Oracle® Retail Customer Engagement

User Guide

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A Calculations

Calculations on Scorecards A-1

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Preface

This guide describes the Customer Engagement Cloud Services. It provides step-by-step instructions to complete most tasks performed through the user interface.

Audience

This User Guide is for users and administrators of Oracle Retail Customer Engagement. This includes merchandisers, buyers, business analysts, and administrative personnel.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at `http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc`.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit `http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info` or visit `http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs` if you are hearing impaired.

Related Documents

For more information, see the following documents in the Oracle Retail Customer Engagement documentation set:

- *Oracle Retail Customer Engagement User Guide*
- *Oracle Retail Customer Engagement Implementation Guide*
- *Oracle Retail Customer Engagement Release Notes*
- *Oracle Retail Customer Engagement Administration Guide*
- Oracle Retail Customer Engagement Batch Processing & Web Services Guide

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

`https://support.oracle.com`

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create

- Exact error message received
- Screen shots of each step you take

Improved Process for Oracle Retail Documentation Corrections

To more quickly address critical corrections to Oracle Retail documentation content, Oracle Retail documentation may be republished whenever a critical correction is needed. For critical corrections, the republication of an Oracle Retail document may at times not be attached to a numbered software release; instead, the Oracle Retail document will simply be replaced on the Oracle Help Center (docs.oracle.com), or, in the case of Data Models, to the applicable My Oracle Support Documentation container where they reside.

This process will prevent delays in making critical corrections available to customers. For the customer, it means that before you begin installation, you must verify that you have the most recent version of the Oracle Retail documentation set. Oracle Retail documentation is available on the Oracle Help Center (docs.oracle.com) at the following URL:

`https://docs.oracle.com/en/industries/retail/index.html`

An updated version of the applicable Oracle Retail document is indicated by Oracle part number, as well as print date (month and year). An updated version uses the same part number, with a higher-numbered suffix. For example, part number E123456-02 is an updated version of a document with part number E123456-01.

If a more recent version of a document is available, that version supersedes all previous versions.

Oracle Retail Documentation on the Oracle Help Center (docs.oracle.com)

Oracle Retail product documentation is available on the following web site:

`https://docs.oracle.com/en/industries/retail/index.html`

(Data Model documents can be obtained through My Oracle Support.)

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the window, or text that you enter.

1

Navigation

This chapter provides a brief description of how to get started using the Customer Engagement Modern View.

About This Guide

This guide contains the following information:

1. Navigation
   - Navigation Icons
   - Task Lists
   - Favorites
   - Notifications
2. Customer Home
   - Search for a Customer
   - Associated Customer List
   - Day Planner
3. Customer Search
   - Customer Search
   - Customers Found
4. Customer Dashboard
   - Customer Household
   - Personal Lists
   - Actions Menu
   - Customer Information
   - Attributes
   - Activity
   - Purchase Profile
   - Stratified Segments
   - Cards and Programs
   - Offers
   - Segments
   - Notes
   - Alternate Keys
   - Associate Assignment
   - Franchisee Assignment

- Merge
- Preference Center
- Tasks

5. Promotions
    - Promotion Search
    - Viewing a Promotion
    - Creating a Coupon Promotion
    - Creating a Product Promotion
    - Creating a Message Promotion
    - Creating a Award Promotion
    - Creating a Points for Purchase Promotion
    - Creating a Points for Marketing Engagement Promotion
    - Promotion Actions
    - Editing a Promotion
    - Duplicating a Promotion
    - Promotion Scorecard
    - Promotion Information - Scorecards
    - Promotion Information - Tabs
6. Offers
    - Offer Types
    - Intended Use
    - Offers Quick Search
    - Offers Advanced Search
    - Creating Offers
    - Editing Offers
    - Duplicating Offers
    - Viewing Offers
    - Offer Scorecard
7. Segments
    - Segment Quick Search
    - Segment Advanced Search
    - Creating a Segment or Personal List
    - Editing Segments / Personal Lists
    - Duplicating Segments / Personal Lists
    - Viewing Segments / Personal Lists
    - Exporting Segments
    - Deleting Segments / Personal Lists
    - Segment Scorecards

8. Registries
   - Looking Up an Item Registry
   - Creating a Registry
   - Viewing a Registry
   - Downloading a Registry Report
   - Editing a Registry
   - Deleting a Registry
9. Programs
   - Program Quick Search
   - Advanced Program Search
   - Creating a Program
   - Editing Programs
   - Viewing Programs
   - Cards
10. Job Management
   - Job Quick Search
   - Job Advanced Search
   - Viewing a Scheduled Job
   - Creating a Scheduled Job
   - Editing a Job
   - Deleting a Job
   - Disabling a Job
   - Enabling a Job
   - Running a Job Immediately
   - Viewing a Job in Process Queue
   - Jobs and Tasks
   - Configure Job Parameters
11. Reports
   - Report Categories and Report Descriptions
   - Displaying Reports
   - Report Generation Options and Contents
12. Administration
   - Associate Role Definition
   - Attribute Management
   - Location Management
   - Preference Types
   - Task Management
   - Creating a Task

- Exchange Rate
- Security Groups

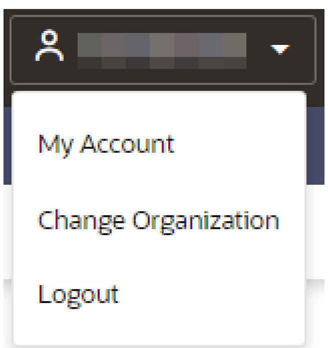
13. Card Administration
    - Overview
    - Card Search
    - Card and Account Details
14. Segment Queries
    - Segment Query Categories
    - Segment Queries
    - Strata Queries
15. Calculations

Getting Started

User Options are accessed by clicking the User Name after a successful login.

They include:

Figure 1-1 User Options

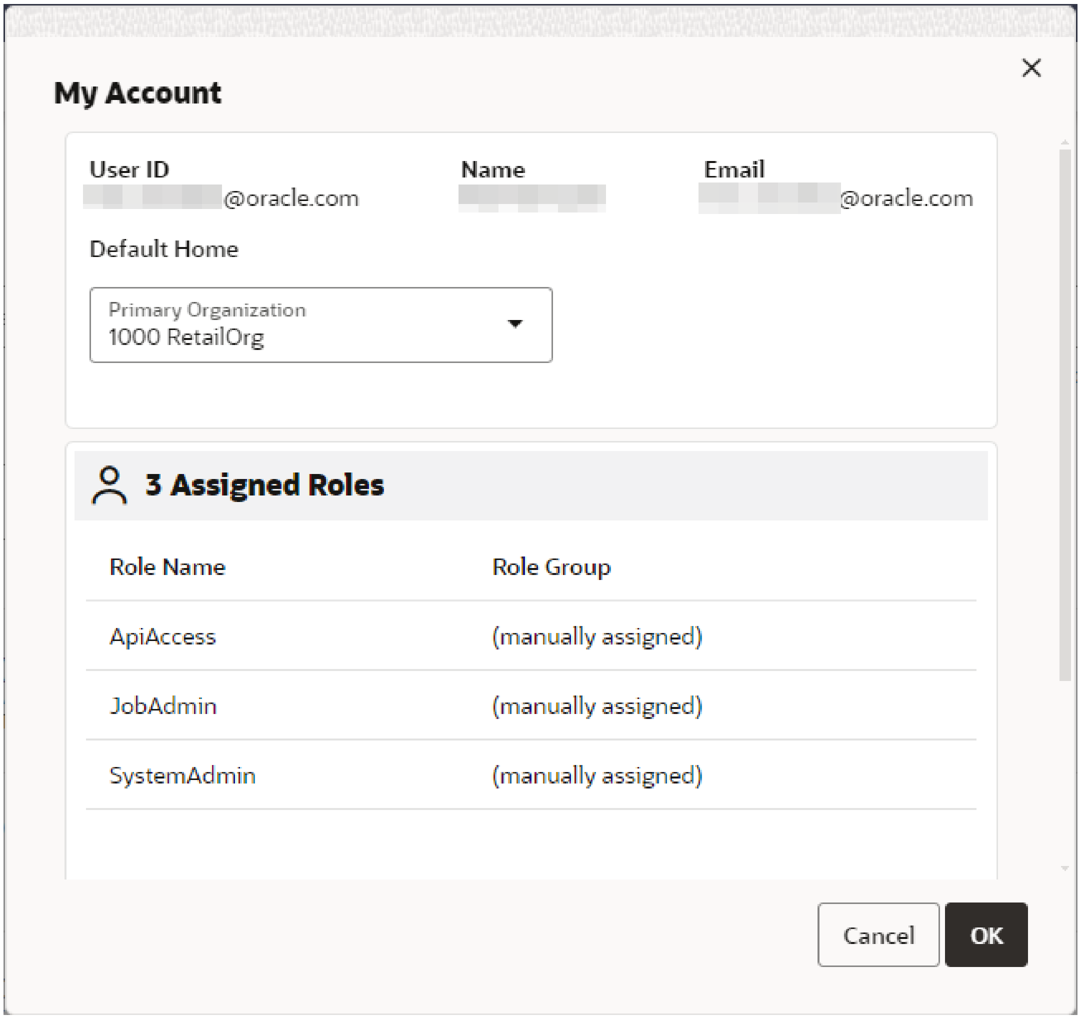


- **My Account** - Displays your profile and the assigned roles. If you are assigned multiple organizations, you can change your primary organization. Depending on your access privileges, you may be able to change your Default Home.

  If available, select the desired Home Page and click **OK** to confirm the selection.

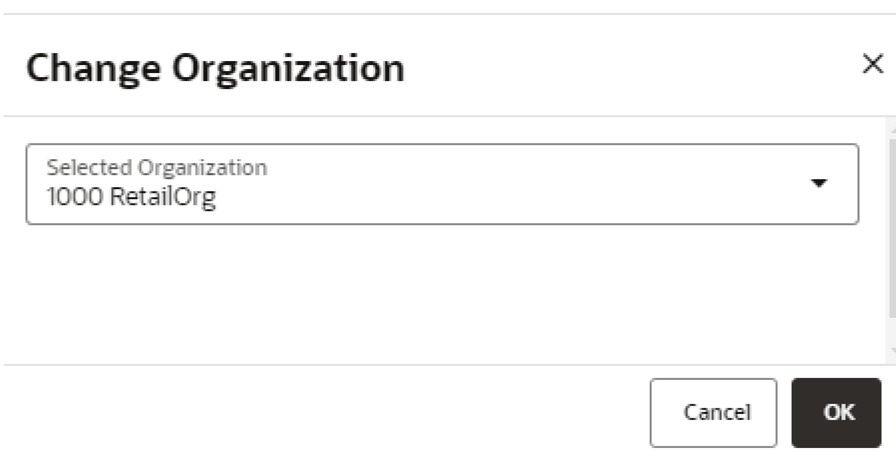
> **Note:**
>
> Organization permissions are controlled by your administrator. You must be assigned to an Organization in order for it to appear in your list.

Figure 1-2 My Account



- **Change Organization -** Displays a drawer with the option to change the Organization. Click the desired Organization and click **OK** to confirm the selection.

Figure 1-3 Change Organization



- **Logout**- Logs you out of the application. Click **Yes** to logout, or **No** to return to the application.

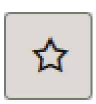
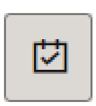
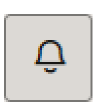
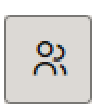
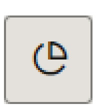
Navigation

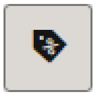
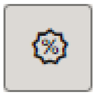
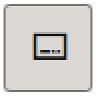
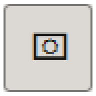
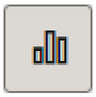
Navigation Icons

When you first log in to the application, it displays a menu and toolbar that you can use to navigate to other areas of the application. Your administrator can assign a roll to determine your start page. Roles include:

- If you have the Customer Home user role, the Customer Home landing page displays.
- If you have the Promotion user role, the Promotion Home landing page displays.
- If you have the Segment user role, the Segment Home landing page displays.
- If you have the Program user role, the Program Home landing page displays.
- If you have the Job Management user role, the Job Management Home landing page displays.

> **Note:**
>
> If a user has multiple "home" roles, this will be the priority of the home window the user lands on after login.
>
> – Customer Home
> – Promotion Home
> – Segment Home
> – Program Home
> – Job Management

Icon	Description
	The **Menu** icon pins/unpins the Menu.
	The **Favorite** icon displays frequently used Tasks and Reports. See Adding or Removing a Favorite for more information.
	The **Tasks** icon displays a Search for a task search box, where you can enter text to search for Task submenu options, along with links to the Home and Customer pages. See Note below for more information.
	The **Notifications** icon alerts you to items needing your attention.. Click the icon to open the Notifications Panel Menu. See Notificationsvaavi for more information.
	The **Customer Search** icon displays the Customer Search page. See Customer Search for more information.
	The **Segment Search** icon displays the Segment search which allows you to select more criteria that are not available in the Segment Quick Search box. You can also Create Segments. See Segments for more information.

	The **Offer Search** icon displays the Offers Advanced search which allows you to select more criteria that are not available in the Offer Quick Search box. You can also Create Offers. See Offers for more information.
	The **Promotion Search** icon displays a Promotion Search which allows you to select criteria to search promotions. You can also Create Promotions. See Promotion Search for more information.
	The **Card Search** icon displays a Card Search which allows you to select criteria to search Cards. See Card Search for more information.
	The **Program Search** icon displays a Program Search which allows you to select criteria to search Programs. See Advanced Program Search for more information.
	The **Reports** icon displays a list of reports that can be run. See Reports for more information.
	The **Overflow Menu** provides additional options including Edit, View, and Delete.

Task Priority

Icons displayed are based on what the user has access to. However, if the user has access to more than 6, there is a priority order for the icons to display. The ones further down the list will then only be accessible from the Main menu or from favorites section if they are marked as a favorite.

The Priority Order is:

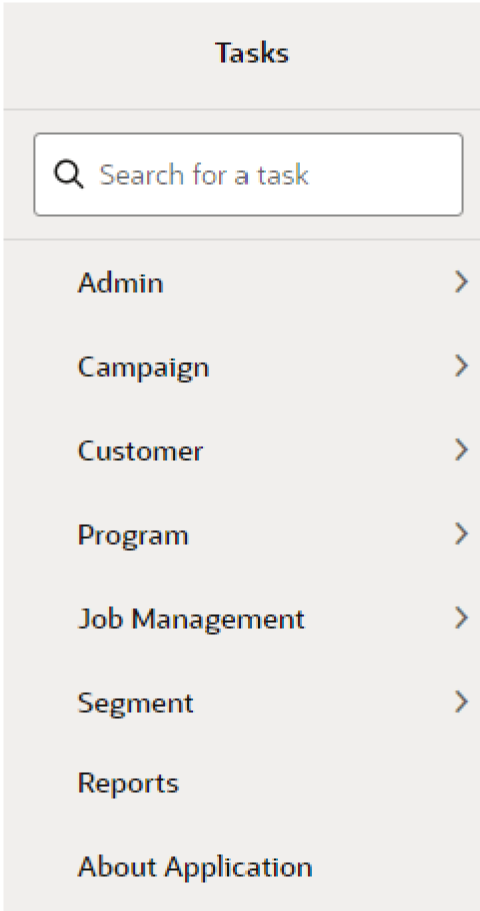
- Customer Search
- Segment Search
- Offer Search
- Promotion Search
- Card Search
- Program Search
- Reports

> **Note:**
>
> Displays only if the user does not have one of the first six features, otherwise it is not a menu option, but can be saved as a favorite

Task Lists

The following tasks are available in the Customer Engagement Modern View.

Figure 1-4 Task List



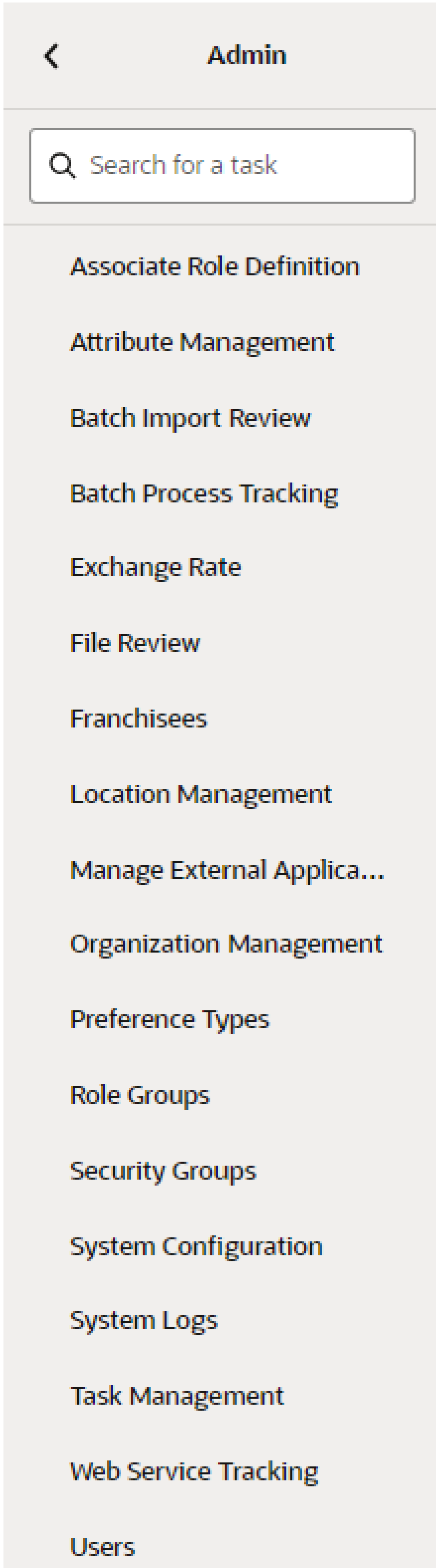
Admin Task List

The Admin Task List contains the following tasks:

- Associate Role Definition
- Attribute Management
- Batch Import Review
- Batch Process Tracking
- Exchange Rate
- File Review
- Franchisees
- Location Management
- Manage External Application Access
- Organization Management
- Preference Types
- Role Groups
- Security Groups

- System Configuration
- System Logs
- Task Management
- Web Service Tracking
- Users

Figure 1-5   Admin Task List

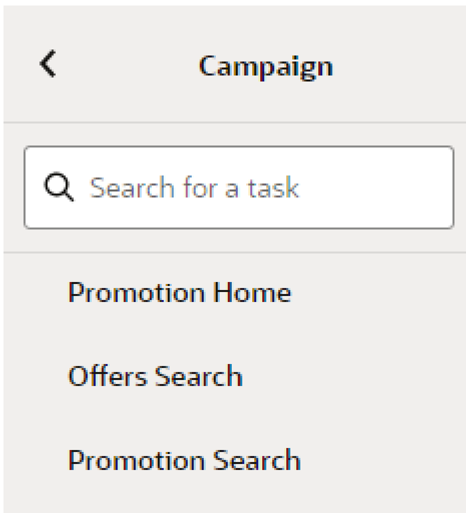


Campaign Task List

The Campaign Task List contains the following tasks:

- Promotion Home
- Offers Search
- Promotion Search

Figure 1-6 Campaign Task List

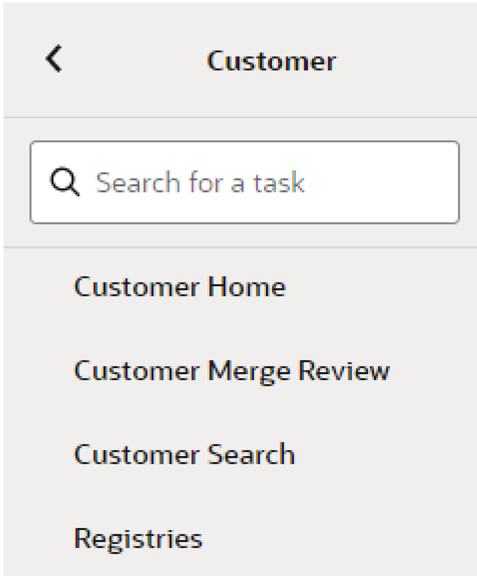


Customer Task List

The Customer Task List contains the following tasks:

- Customer Home (Role Dependent)
- Customer Search
- Registries

Figure 1-7 Customer Task List

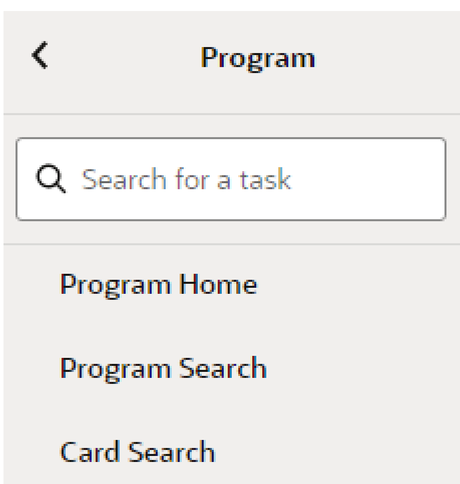


Program Task List

The Program Task List contains the following tasks:

- Program Home
- Program Search
- Card Search

Figure 1-8 Program Task List

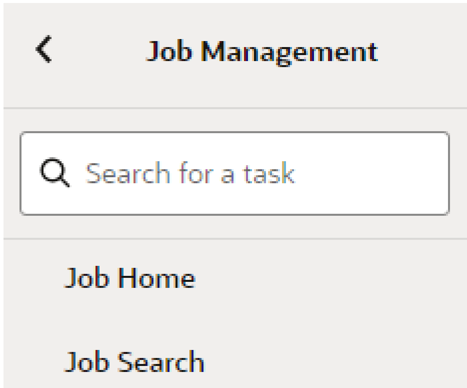


Job Management Task List

The Job Management Task List contains the following tasks:

- Job Home
- Job Search

Figure 1-9   Job Management Task List

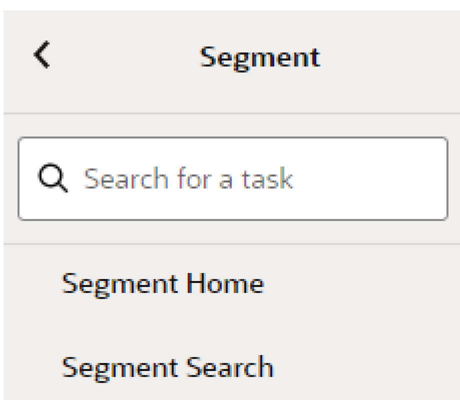


Segment Task List

The Segment Task List contains the following tasks:

- Segment Home
- Segment Search

Figure 1-10   Segment Task List



Additional Tasks

The Reports Task opens the Reports application. The About Application opens a pop up window with the information regarding this version.

Favorites

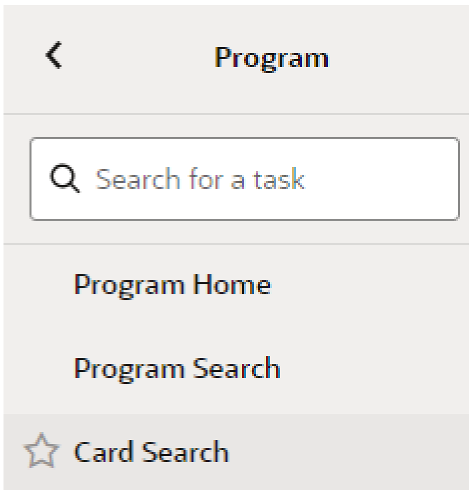
Favorites provide the ability to designate certain Tasks or Reports as Favorites that allow quick and easy access to frequently menu selections. You may also Pin or Unpin favorites to the Main Navigation Menu.

Adding or Removing a Favorite

A full blue star indicates which Task or Report is a Favorite and conversely, an empty blue star indicates which Task or Report is not a Favorite. To add a Favorite do the following:

1. Navigate to the desired **Task** or **Report**.

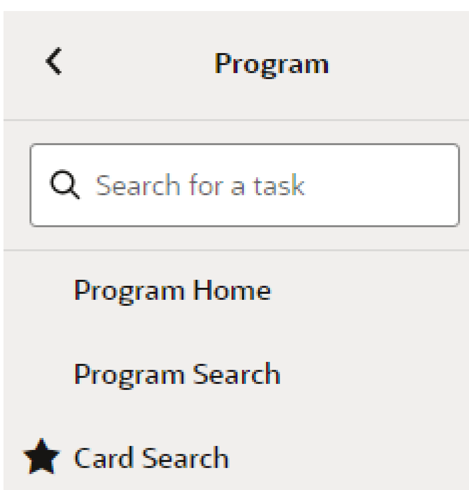
Figure 1-11 Menu Item - Favorites



2. To designate the Task or Report as a Favorite, click the empty star icon to change it to a full blue star icon.

   Result: The specific task or report is designated as a Favorite.

Figure 1-12 Favorite



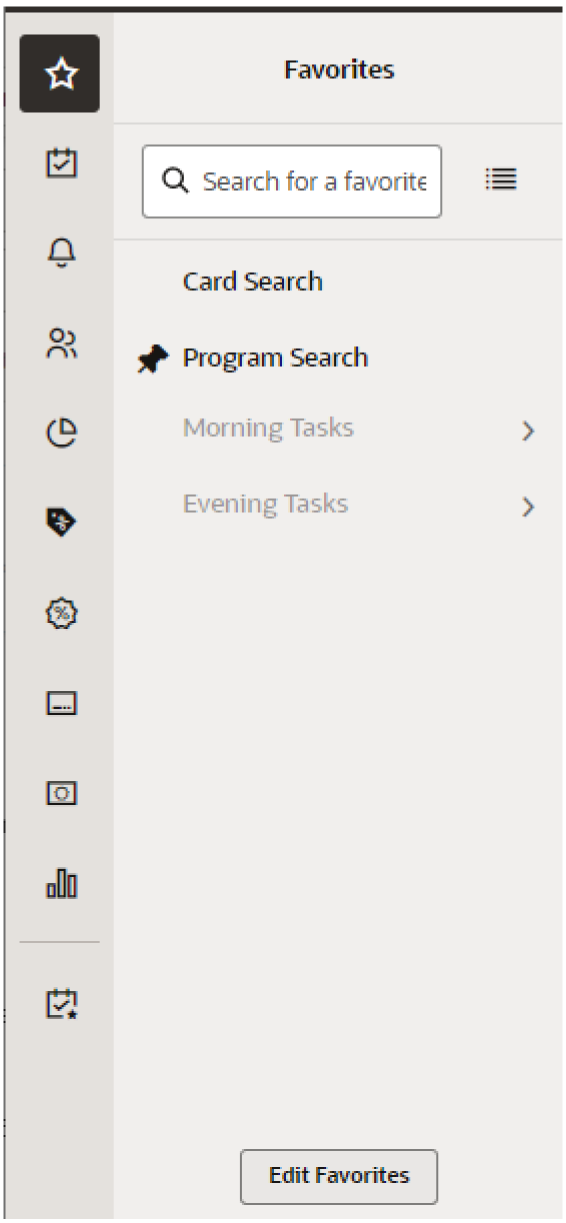
3. To remove the Task or Report as a Favorite, click the full blue star to change it to an empty star icon.

> **Note:**
>
> You can also remove a Favorite that has been designated as a Pin. See Pin or Unpin Favorite Tasks fore more information.

Viewing Favorites

From the Navigation bar, click the Star icon to view all Favorites.

Figure 1-13 Favorites



Group View

By default, nested Favorites are contained inside folders within the Group View. Figure 1-14 displays top level directories containing one or more Favorites. Figure 1-15 displays the Favorites included in that directory. See Organized Favorites for details on how to create folders.

Figure 1-14 Nested Favorites

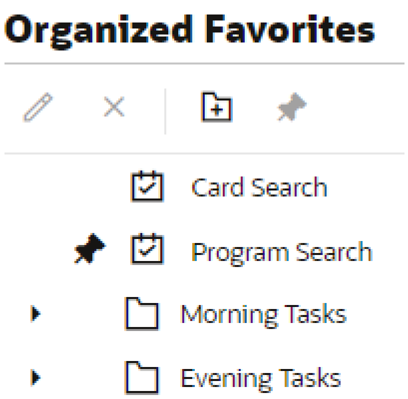
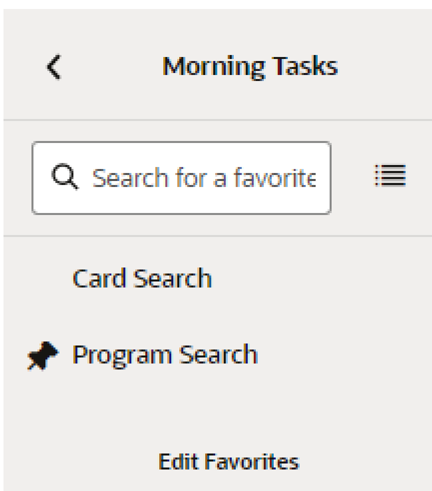


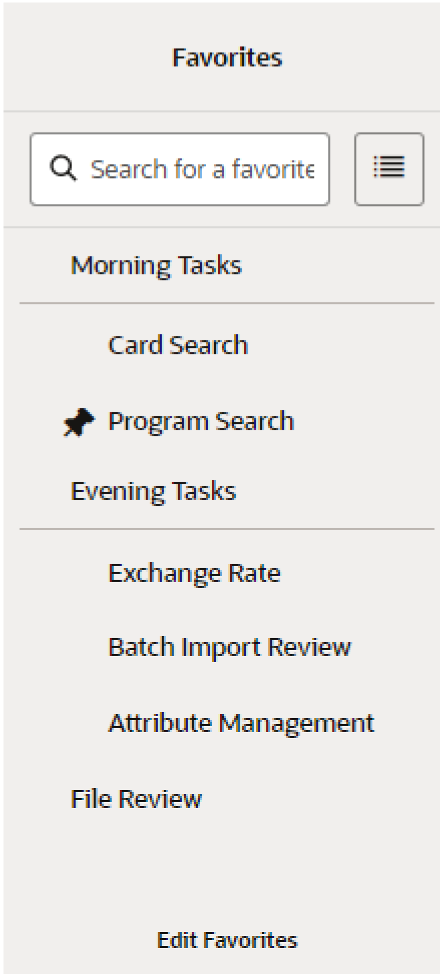
Figure 1-15 Nested Favorites - Drill Down



List View

Folders and their contents display as a flat list in the List View. Click the **Group View or List View** icon to toggle the display options.

Figure 1-16 Nested Favorites - List View

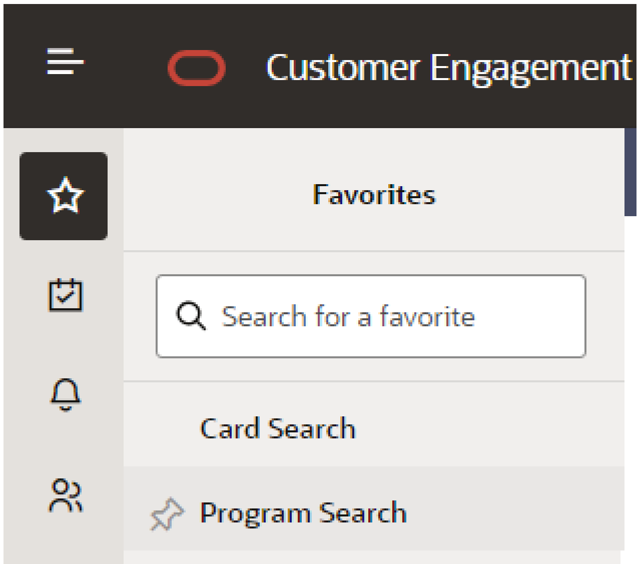


Pin or Unpin Favorite Tasks

Favorite Tasks can pinned or unpinned to the Navigation Bar for quick access. To Pin or Unpin a Task, do the following:

1. Click the **Favorites** icon.
2. Hover over the **Task** to display an empty pin icon.

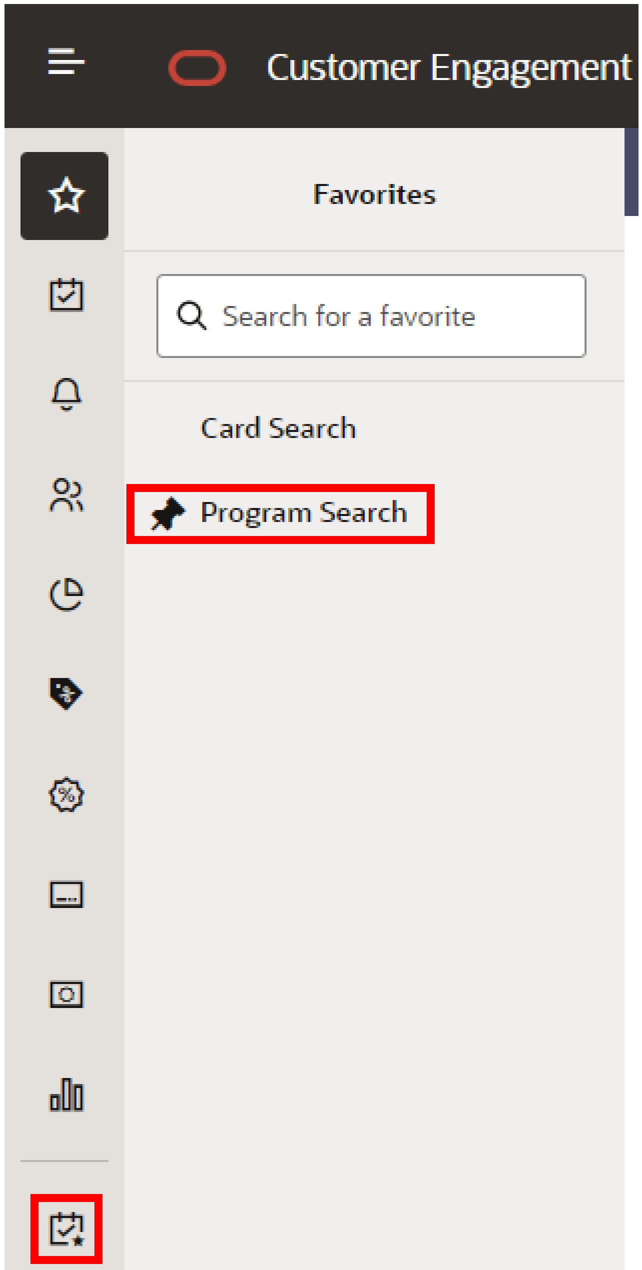
Figure 1-17 Pinning a Favorite



3. Click the **Pin** icon.

   Result: The Pin icon is filled in and a corresponding icon for the Task appears in the Navigation menu as noted in Figure 1-18.

Figure 1-18 Pinned Favorites



4. Click any filled **Pin** icon to unpin.

Editing Pins - Navigation Menu Icons

Favorites that are pinned appear on the Navigation Bar as icons. The following options are available when you right-click a **Pinned Favorite**:

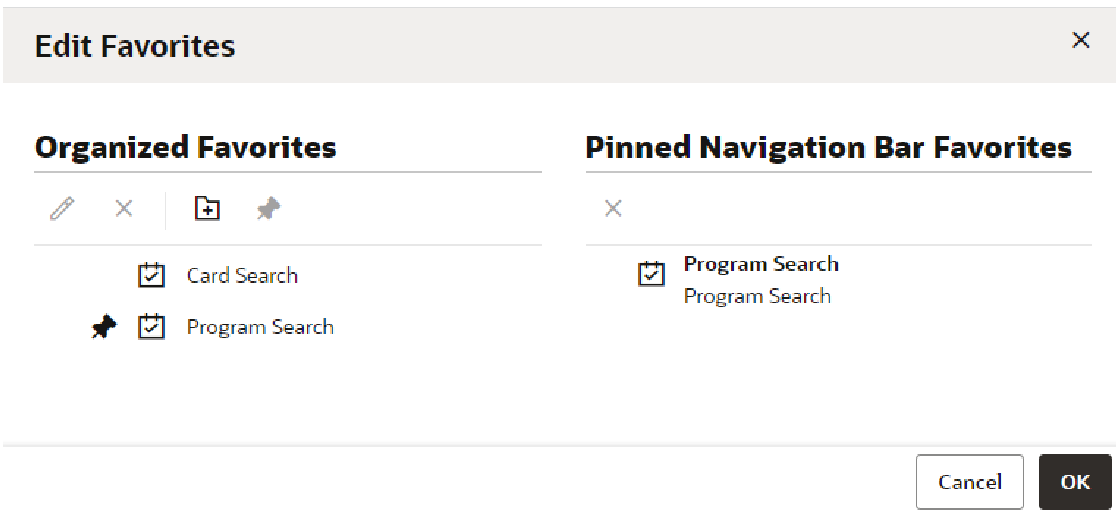
- **Unpin Favorite -** Removes the Task or Report from the Navigation Bar.
- **Unpin and Remove Favorite -** Removes the Task or Report from the Navigation Bar and Favorites List.
- **Edit Favorites -** Opens Edit Favorites. See Editing Favorites for more information.

Editing Favorites

From the **Edit Favorites** window, you can edit, organize, rename, pin, and unpin favorites. In **Edit Favorites**, you can manage which Favorites display and in which order the Favorites display.

- From the Context Menu of the Pinned Navigation Bar Favorites, right-click any pinned favorite icon and then select **Edit Favorites**.
- Click **Edit Favorites** at the bottom of the Favorites Menu.

Figure 1-19 Editing Favorites



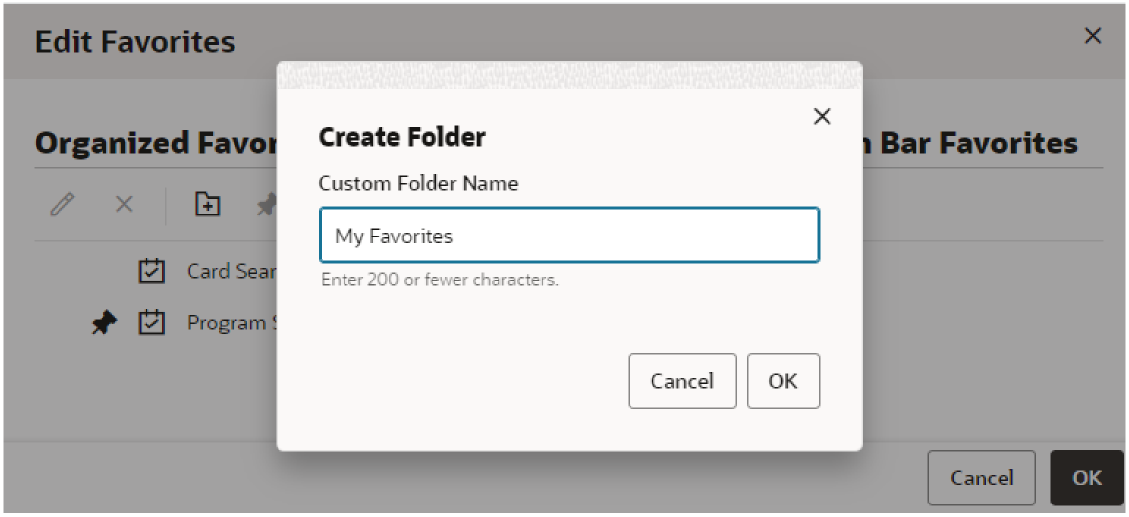
Organized Favorites

The following options are available after highlighting a Favorite:

- **Edit Favorite** - Enter a **Custom Favorite Name** and click **OK** to save the changes or click **Cancel** to close the window without saving any changes.
- **Delete Favorite** - Click the **X** icon to remove (unpin) the task from the Navigation Bar and Favorites task list.
- **Toggle Pin** - Click the **Pin** icon to Add or Remove (Pin or Unpin) Favorite Tasks from the Navigation Bar.

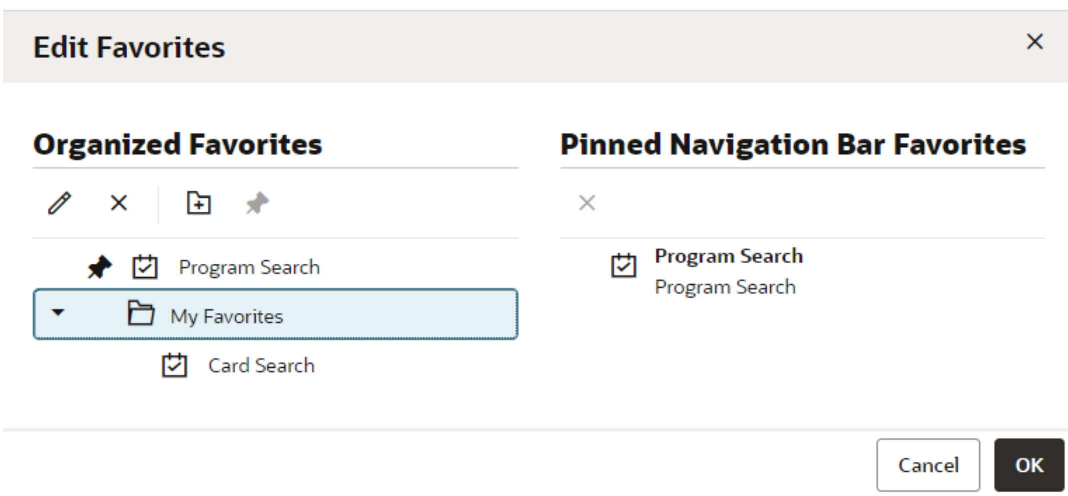
At anytime, you can click **Create Folder** to organize your Favorites into directories. Once created you can drag and drop favorites into these directories. To create a folder do the following:

Figure 1-20 Creating Folders



1. Click the **Create Folder** icon.
2. Enter a **Customer Folder Name**.
3. Click **OK** to create the folder or **Cancel** to close the window without saving changes.
4. Drag and drop the desired **Favorites** into the folders. See Edit Favorites - Working with Folders for more information.

Figure 1-21 Organized Favorites - Folders



Pinned Navigation Bar Favorites

Press **Shift + F10** or right-click a **Pinned Favorite** to display the following options:

- Cut
- Paste Before
- Paste After

> **Note:**
>
> In addition to the cut and paste options, you can reorder the pinned favorites from the Pinned Navigation Bar Favorites section on the Edit Favorites window by clicking a folder or favorite and dragging it to a new position.

- Unpin Favorite

> **Note:**
>
> You can also highlight a Pinned Task and click the **X** icon to unpin a favorite.

Edit Favorites - Working with Folders

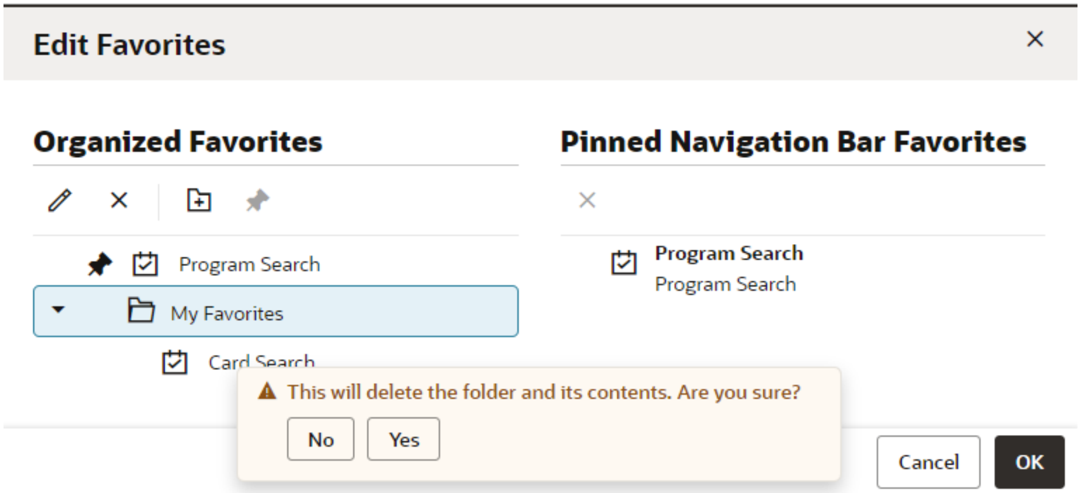
You can edit, organize, rename, pin, and unpin favorites from the **Edit Favorites** window. The favorites displayed and the order in which the favorites are displayed are managed in **Edit Favorites**.

> **Note:**
>
> See Organized Favorites for information on how to create a folder.

Press **Shift + F10** or right-click a folder to display the following options:

- Edit - Enter a **new name** for the previously created folder. Click **Ok** to accept or click **Cancel** to close the window without saving.
- Cut
- Paste Before
- Paste After
- Paste Inside - Use this option on Favorites to move them into a folder.
- Delete - Deletes the folder and the contents. A warning message appears. Click **Yes** to delete the folder and its contents or click **No** to close the warning without deletion.

Figure 1-22   Delete Folder - Warning

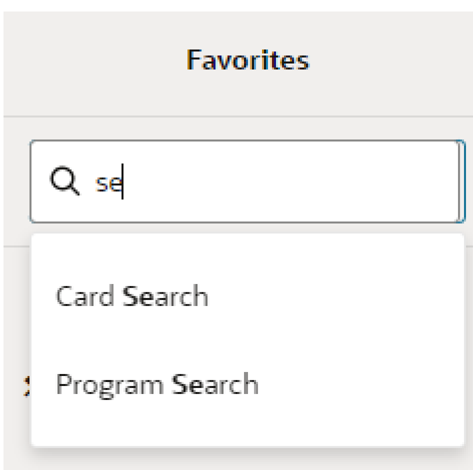


Searching Favorites

The Favorites Menu provides a smart search feature to enable you to quickly find and open a task or report that is marked as a Favorite.

- Enter any part of a task or report name and the list automatically populates with matching results as shown in Figure 1-23.
- Select one of the items in the list to open that task or report.

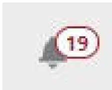
Figure 1-23   Smart Search Feature



Notifications

The Notifications icon serves as a quick access point for all notification activity and provides an initial view of Job Status. The notification icon on the sidebar displays a badge with the total number of unread notifications.

Figure 1-24   Notification Icon

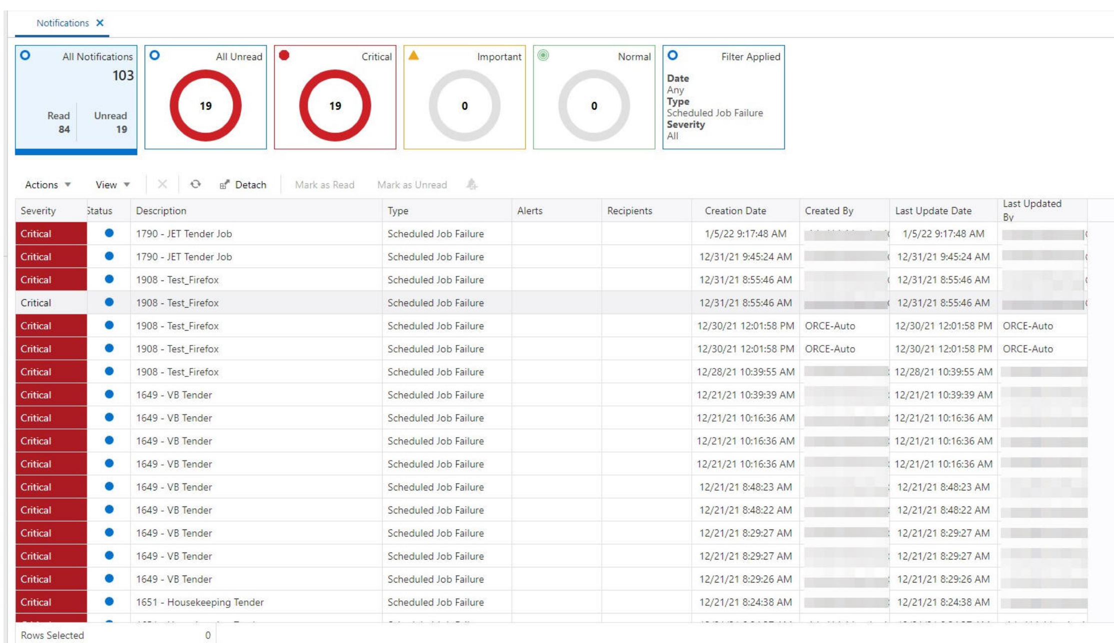


> ✎ **Note:**
>
> ‘In order to view notifications, you will need to be part of the PLATFORM_SERVICES_ADMINISTRATOR_ABSTRACT (IDCS PSRAF) group and added to each group associated with each notification type to view. Currently, the two notification types are ORPE_CLIENT_OFFLINE and ORCE_JOB_FAILURE. Additionally, RAF_JOB_NOTIFICATIONS and RAF_ORPE_NOTIFICATIONS need to be created in the Default domain and the you will need to be added to that. This is managed in IDCS. The JobAdmin and JobListing roles will need to be assigned to view notifications on the UI ORCE and are ORCE roles.

Notifications Page

The Notifications Page provides more details about the notifications.

Figure 1-25   Notifications Page

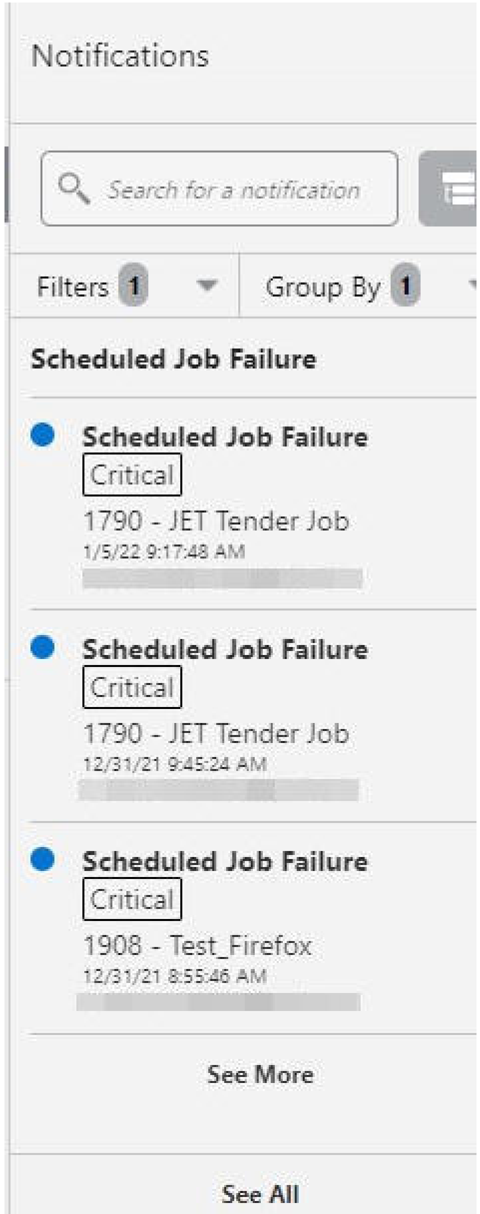


Accessing the Notifications Page

To view the Notifications Page do the following:

1. Click the **Notifications** icon. The Notifications panel appears.

Figure 1-26 Notifications Panel



2. Click **See All**. The Notifications page appears.

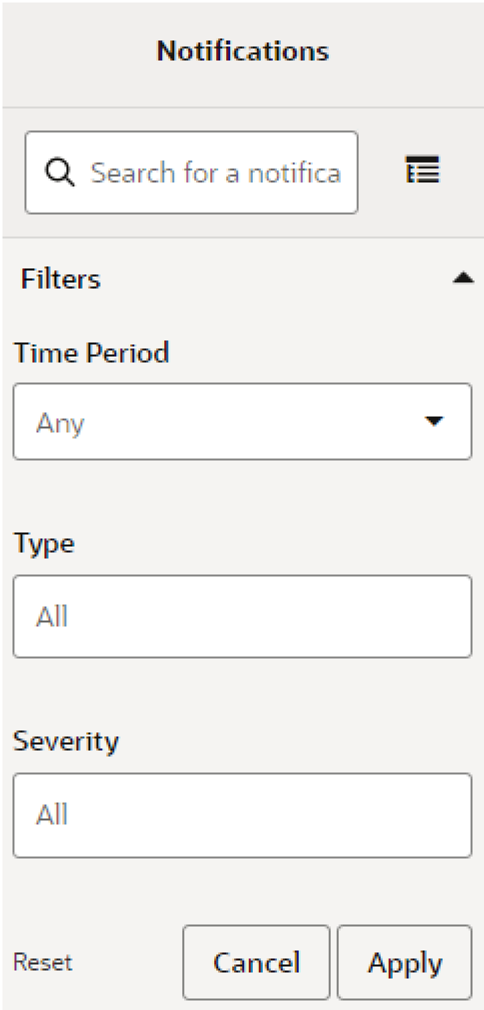
Using the Notifications Panel

The active view in the panel depends on which filters are selected and whether the grouping toggle is activated. The filter view is active when the grouping toggle is off. The grouped view is accessed by turning the grouping toggle on.

Filter View

The Filter view shows each notification individually. Click the **Filters down facing arrow** to expand the filter options.

Figure 1-27 Filter View



The filter view supports three search criteria. The Time Period, Type, and Severity inputs allow filtering on the respective fields of the notification.

Click **Apply** to fetch the Notifications that match the set values. Click **Cancel** to revert to the previously used values, and Click **Reset** to reset to the default values (but does not close the tab or save them).

In this view, individual notifications are listed out in detail. In order, the notifications: Type, Severity, Description, and Last Updated values are displayed.

Clicking a notification with launch able context will mark it as read and open the context. For other notifications, they can be marked as read by clicking the filled blue circle in the upper-left corner; clicking the rest of the notification will have no effect.

Group View

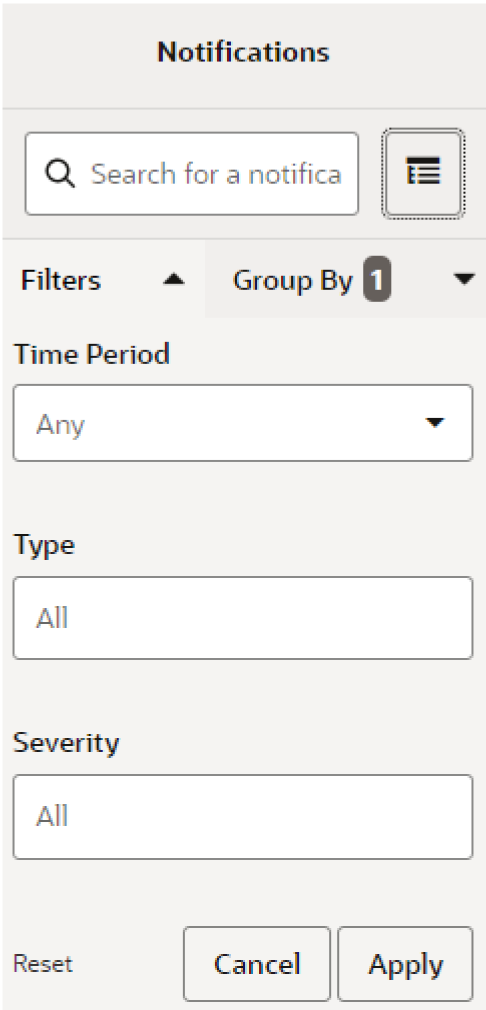


Figure 1-28 Group View

The Group view shows notifications grouped by hierarchy values. The group view is active by clicking the **Grouping Toggle** to on and only **one** grouping option at a time can be selected.

The grouping options allow the selection of up to two hierarchy levels to organize the notifications by. The first selection is required while the toggle is active; the second is not. Also, the group by and then by lists are mutually exclusive - selecting an option in one will remove it from the other. The buttons on the tab work in the same manner as those on the filter tab.

This view is similar to the first, save that the notifications are organized by hierarchy value. Initially, the three most recent notifications for each hierarchy value will be displayed. Click **See More** to load up to twenty five notifications. Clicking a notification in this view behaves the same as in the filter view.

Working with Notifications

The Notifications page provides more details about the notifications. It also displays read notifications and the ability to reassign notifications.

Metric Tile Section

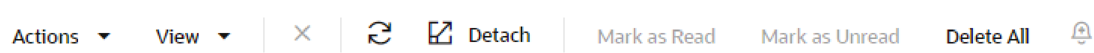
The Notifications Page has the following five tiles in this section. Clicking on any tile will filter the table to the content for that tile (for example, unread critical notifications). The Filter tile only shows up in certain cases: when there are filters set on the sidebar menu.

- All Notifications
- All Unread
- Critical
- Important
- Normal
- Filter Applied - Displays only when Filters are applied.

Data Display Section

The following options will display in the toolbar of the data display section:

Figure 1-29 Toolbar Options



- **Action Menu**
  - Delete
  - Refresh Notifications
  - Mark as Read
  - Mark as Unread
  - Reassign Notification
- **View Menu**
  - Manage Columns
  - Detach
  - Sort
- **Icons**
  - Delete
  - Refresh
  - Detach
  - Mark as Read
  - Mark as Unread
  - Reassign Notification

Click on one or more rows and then select the desired option from the Toolbar options.

2

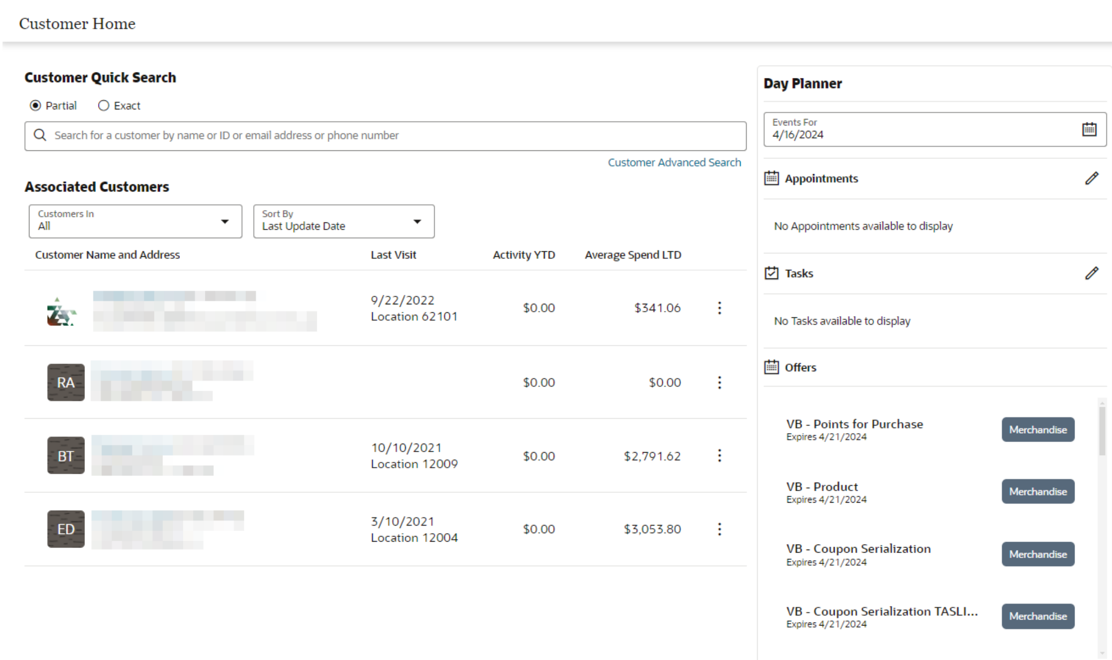
Customer Home

Customer records store basic information about each customer. These records can be associated with a card or an account used to track transactions and provide incentives to customers.

Customer records can be used to track individual customers and their shopping preferences, habits, and tendencies. This allows locations and chains to target promotions to customers most likely to take advantage of purchase incentives given by the location or chain.

When you log in to the application, it first displays the Home page with the Customer Quick Search panel and the Day Planner panel. If you have customers assigned to you, the Home page search panel will also have a list of Associated Customers. See Associate Assignment for more information about associated customers.

Figure 2-1   Customer Home



Search for a Customer

You can search for additional customers by entering the customer name, customer id, alternate key, email address, or phone number in the Search bar. Select **Partial**, if you want to results that match part of what you enter, or select **Exact** if you only want results that are an exact match.

Click the Customer Advanced Search link to do an advanced search. See Customer Search for more information.

Associated Customer List

You can filter for customers by segment and select from a list of sort criteria. There are several actions available on an Action menu in each customer row, including Add to Personal List, Create Appointment, Create Note, Create Registry, and Create To Do.

This information is displayed for each customer in the Associated Customers grid:

- Customer - The customer image, icon or initials and the customer's name and address.
- Last Visit - The date of the customer's last purchase.
- Activity YTD - The total amount of the customer's purchases year-to-date, displayed in the base system currency.
- Average Spend LTD - The average amount of the customer's purchases life-to-date (the total amount of the customer's purchases life-to-date divided by the number of purchases). Displayed in the base system currency.

Filtering by Segment

By default the Associated Customers list includes all customers assigned to the associate regardless of the segments to which they belong. If you do not want to filter by segment, keep the default selection in the Customers In field, as All.

To Filter the Associated Customers list by Segment:

1. Click the drop-down list in the Customers In field.
2. Click a segment from the list to filter for only the customers in that segment.

Sorting Associated Customers

You can sort customers in the Associated Customer list by any of the information contained in the grid by making a selection from the items in the Sort by list. These include:

- Average Spend LTD
- Activity YTD
- Last Visit
- Last Name
- First Name
- Address
- City
- State
- Last Update Date

Linking to the Customer Dashboard

You can click a customer name or image icon in the Associated Customers list to view them in the Customer Dashboard.

Associated Customer Actions

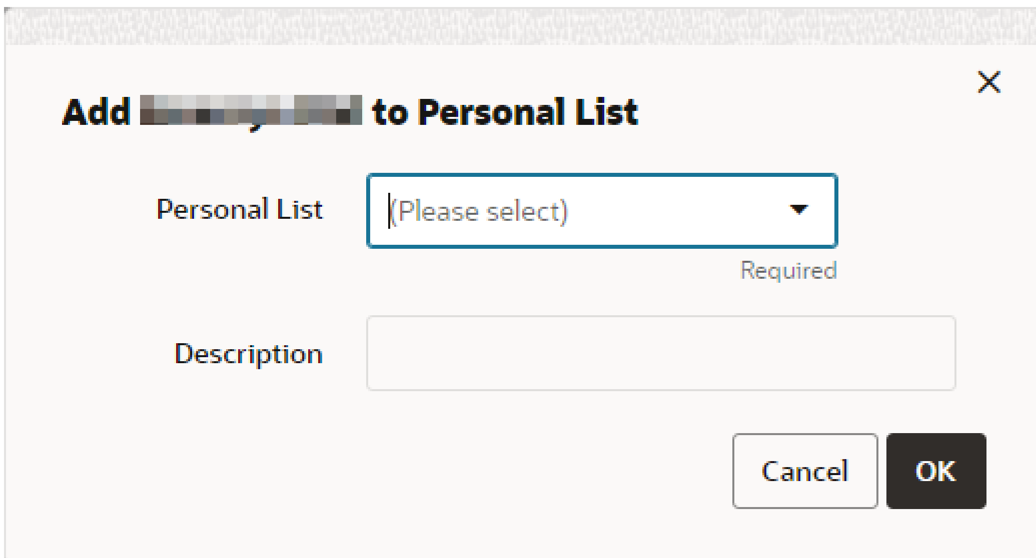
The Actions menu in each row, in the Associated Customers list, provides access to the actions described below:

Add to Personal List

To add a customer to your personal list:

1. In the row of the customer that you want to add, click the Actions menu and choose Add to Personal List. This displays the following prompt:

   Figure 2-2   Add Customer to Personal List

2. Select a list from the Personal List drop-down. A description of the selected list is displayed in the Description field.
3. Click **OK**. This adds the customer to the list.

Create Appointment

To create an appointment for a customer:

1. In the row of the customer for whom you want to create an appointment, click the **Actions** menu and choose **Create Appointment**. This displays the Create Task window for the customer with the Task Type, Appointment selected.
2. Enter the rest of the details for the appointment and click **OK** when you are done. This creates the task and returns you to the Associated Customers list.

   For more information, see: Tasks

Create Note

To create a note for a customer:

1. a. In the row of the customer for whom you want to create a note, click the Actions menu and choose Create Note. This displays the Create Note dialog for the customer.
   b. Select the Note Type and enter the note in the Note field. If you do not want the note to be seen by others select the Mark as Private check box.
   c. Click **OK** when you are done. This creates the note and returns you to the Associated Customers list.

      For more information, see: Notes

Create Registry

To create a registry for a customer:

1. In the row of the customer for whom you want to create a registry, click the **Actions** menu and choose **Create Registry**. This displays the Create Registry window for the customer.
2. Enter the registry details and click **OK** when you are done. This creates the registry and returns you to the Associated Customers list.

For more information, see: Registries

Create To Do

To create a To Do task for a customer:

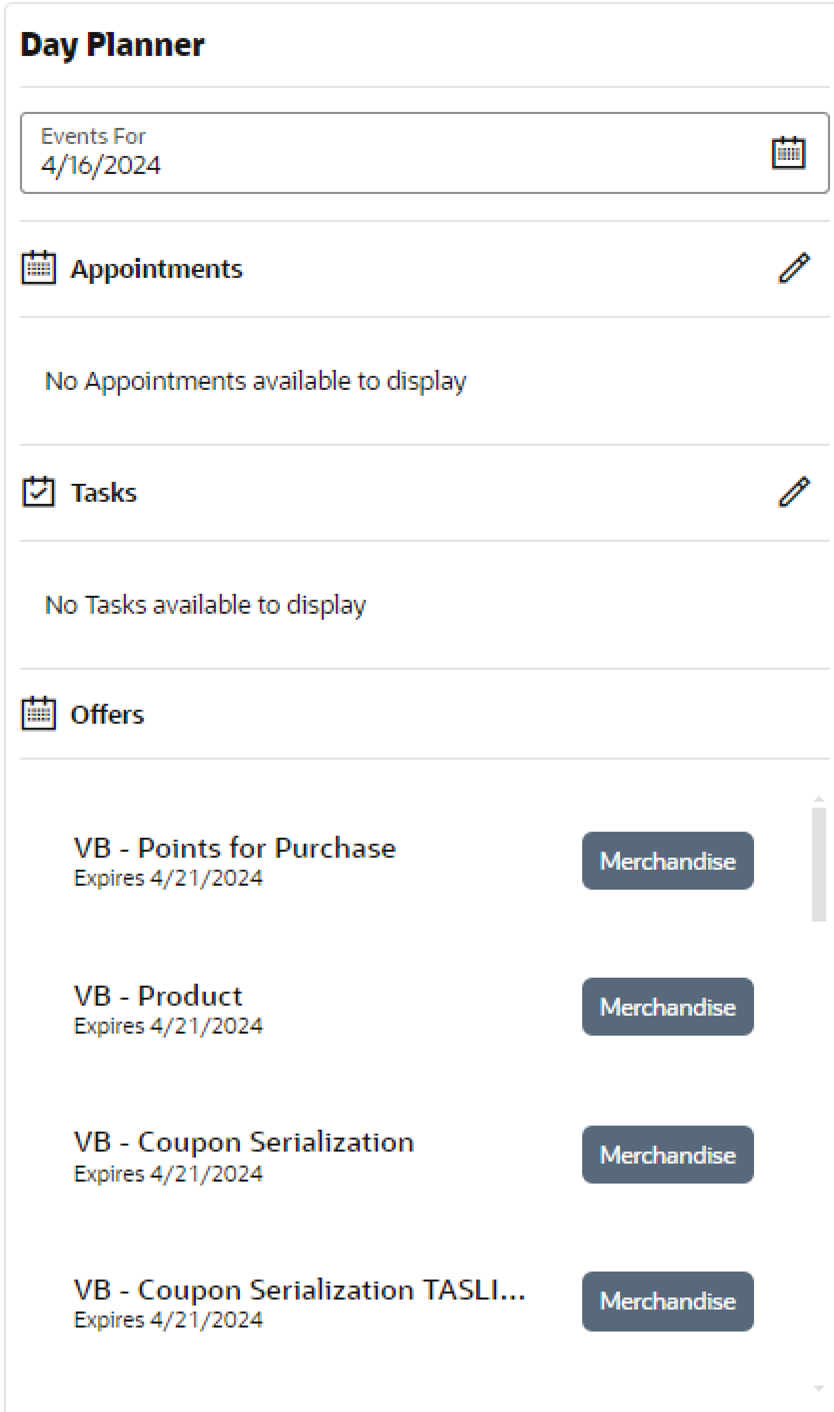
1. In the row of the customer for whom you want to create a To Do task, click the **Actions** menu and choose **Create To Do**. This displays the Create Task window for the customer with the Task Type, To Do selected.
2. Enter the rest of the details for the task and click **OK** when you are done. This creates the task and returns you to the Associated Customers list.

For more information, see: Tasks

Day Planner

The Day Planner shows a list of appointments and tasks assigned to the associate as well as offers for a given day.

Figure 2-3 Day Planner



Click the **Calendar** icon in the Events field to select a different date.

The following information is displayed for the selected date:

- **Appointments** - Shows the appointments for the selected date. No expired appointments are shown. The maximum number of appointments displayed is 25. If there are no appointments, the message `No appointments available to display` is shown.

- **Tasks** - Shows the tasks assigned on the selected date. No expired tasks are shown. The maximum number of tasks displayed is 25. If there are no tasks, the message `No tasks available to display` is shown.
- **Offers** - Shows all active offers based on the selected date. The offers are shown for the default location of the associate. If there is no default location identified, all offers for the chain are shown. No expired offers are shown. The maximum number of offers displayed is 25. If there are no offers, the message `No offers available to display` is shown.

3

Customer Merge Review

The Customer Merge Review process allows you to search for and view duplicates prior to approving a merge.

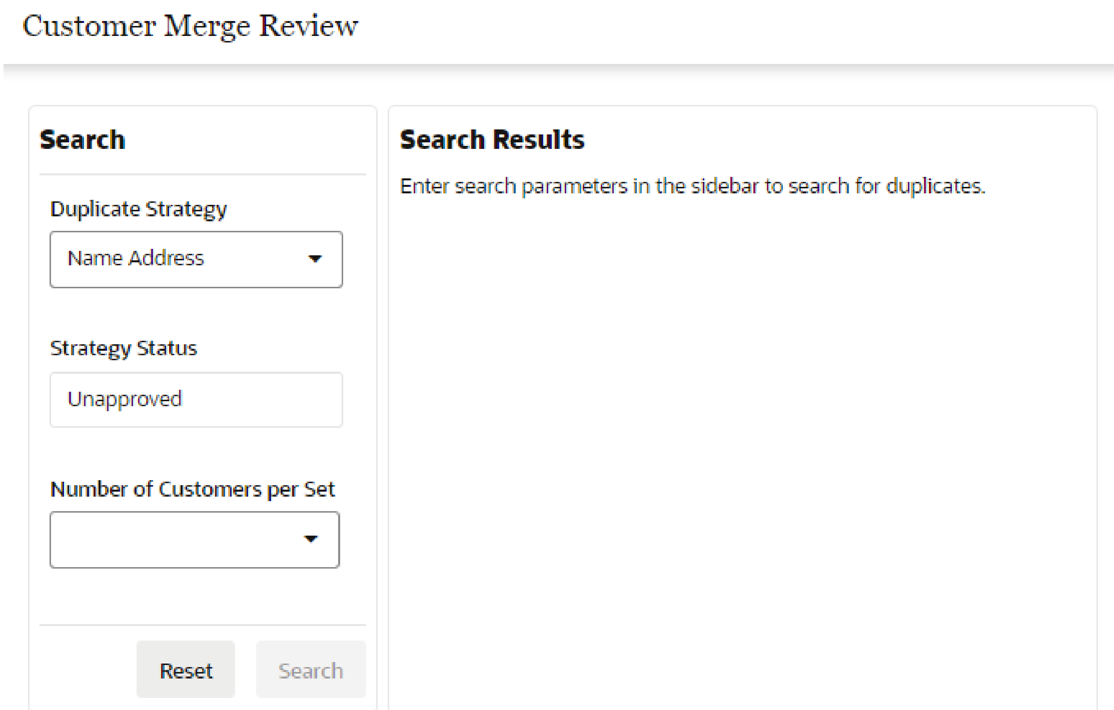
The merge will combine multiple customer records into one, new customer record. This new customer record includes the transaction, card and account information from all the merged customer records based on how the system is configured. Other customer data: addresses, e-mail addresses, phone numbers, and so on, are taken from a single source record determined by Customer Engagement. The Customer Merge Review is displayed by accessing the Customer Merge Review option from the Customer Tasks menu.

> **Note:**
>
> The customer merge will be blocked if there are payment card tokens on any one of the customers being merged. The payment card tokens can be deleted from the Payment Card Tokens screen or via web service. When payment card tokens are deleted, the payment service provider will provide new tokens when a payment is initiated.

Customer Duplicate Set Search

To search for a duplicate set:

Figure 3-1 Customer Merge Review Search Panel



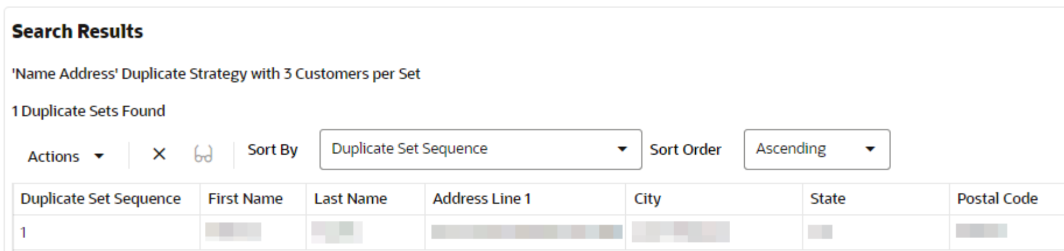
1. In the Duplicate Strategy selection menu, select the **strategy** of the search to view. This field is required for the search. It is used to select the duplicate strategy results to review. The duplicate strategy is how the duplicates were found, such as matching by name and address or name and phone, and includes the following combinations.
   - Name Address
   - Name Phone
   - Name Email
   - Name Address Phone Email

   > **Note:**
   >
   > **Strategy Status -** This identifies whether the duplicate strategy selected is Approved or Unapproved. This is for informational purposes only.

2. In the Number of Customers per Set Menu, select the **number** of customers per set. It is used to select the number of customers in each set to display. This field is required for the search and is based on the duplicate strategy selected.
3. Click **Search**. The Duplicate Sets Found results appear.

> **Note:**
>
> Customer eligibility for merging is based on how the system is configured. See the Implementation Guide for more information.

Figure 3-2 Search Results - Duplicate Sets Found



The duplicate list displays the following information for each duplicate. Note that the address information displayed is from the source record. Fields include:

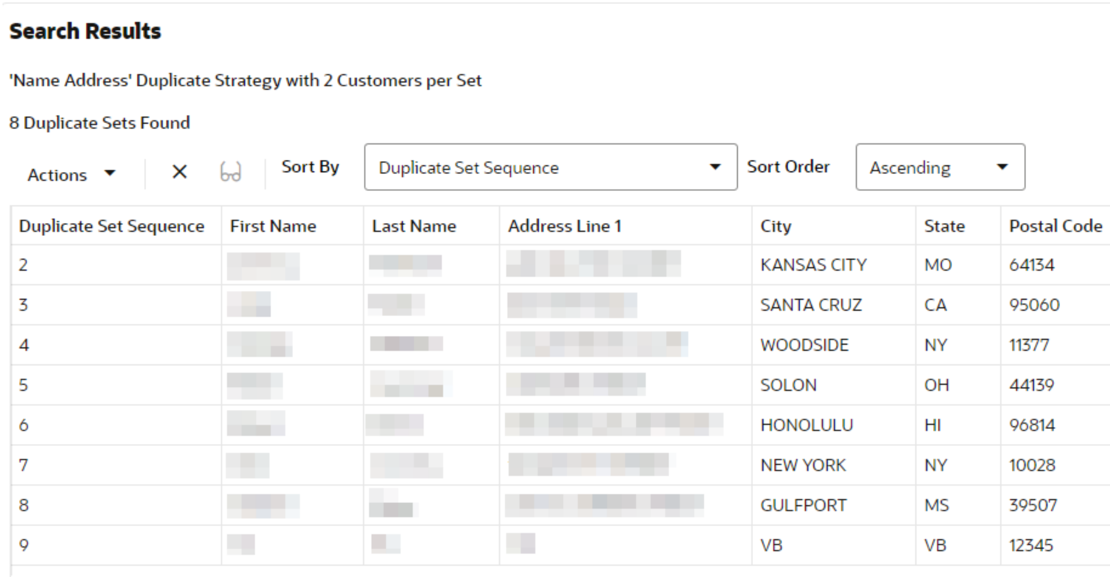
- Duplicate Set Sequence - The order in which the duplicate was found during the duplicate search.
- First Name - First name of the customer.
- Last Name - Last name of the customer.
- Address Line 1 - Line 1 of the customer's primary street address.
- City - City of the customer' primary address.
- State - State or province of the customer's primary address.
- Postal Code - Postal code or zip code of the customer's primary address.

Duplicate Sets Found

The customer records matching the search criteria are displayed under Duplicate Sets Found.

Sorting Duplicates

Figure 3-3 Duplicate Sets Found



Duplicate Set Sequence	First Name	Last Name	Address Line 1	City	State	Postal Code
2				KANSAS CITY	MO	64134
3				SANTA CRUZ	CA	95060
4				WOODSIDE	NY	11377
5				SOLON	OH	44139
6				HONOLULU	HI	96814
7				NEW YORK	NY	10028
8				GULFPORT	MS	39507
9				VB	VB	12345

You can use the Sort By drop-down list to sort the list of duplicate sets found by the following options:

- **Duplicate Set Sequence** - The order in which the duplicate was found during the duplicate search.
- **First Name** - First name of the customer.
- **Last Name** - Last name of the customer.
- **Address Line 1** - Line 1 of the customer's primary street address.
- **City** - City of the customer' primary address.
- **State** - State or province of the customer's primary address.
- **Postal Code** - Postal code or zip code of the customer's primary address.

Results can be sorted ascending or descending from the list.

Action Menu

The Actions menu for the Customer Merge Review screen has the following options:

- **Approve** – Indicates to the system the duplicates found by the currently selected strategy should be merged. See Approve Duplicate Sets for more information.
- **Unapprove** – Indicates to the system the duplicates found by the currently selected strategy should not be merged. See Unapprove Duplicate Sets for more information.
- **Delete** – Delete all the found duplicates from the currently selected strategy. See Delete Duplicate Sets for more information.

- **View** – When selected, the View Duplicate Customer Set screen will display. See View Duplicate Sets for more information

> **Note:**
>
> An individual duplicate set cannot be selected for approval, unapproving, or deletion. When selecting the action menu option, the action will apply to all duplicate sets that are currently displayed.

Approve Duplicate Sets

To indicate the duplicates found by the selected Duplicate Strategy should be merged:

1. Select **Approve** from the Customer Merge Review Actions menu.

   Result: A confirmation window appears.

2. Click **OK** to approve merging the displayed duplicate sets.

> **Note:**
>
> The duplicates found by the currently selected duplicate strategy are approved for merging. The duplicates will be merged during the next run of the Duplicate Merge job.

Unapprove Duplicate Sets

To indicate the duplicates found by the selected Duplicate Strategy should not be merged:

1. Select **Unapprove** from the Customer Merge Review Actions menu.

   Result: A confirmation window appears.

2. Click **OK** to unapprove merging of the duplicate sets.

> **Note:**
>
> The duplicates found by the currently selected duplicate strategy will not be merged during the next run of the Duplicate Merge job.

Delete Duplicate Sets

To empty the list of duplicates found by the selected strategy:

1. Select **Delete** from the Customer Merge Review Actions menu.

   Result: A confirmation window appears.

2. Click **OK** to empty the list of duplicate sets.

> **Note:**
>
> The duplicates previously found by the currently selected duplicate strategy will be deleted from the system. These duplicates must be found again by another duplicate search job before they can be reviewed and approved for merge.

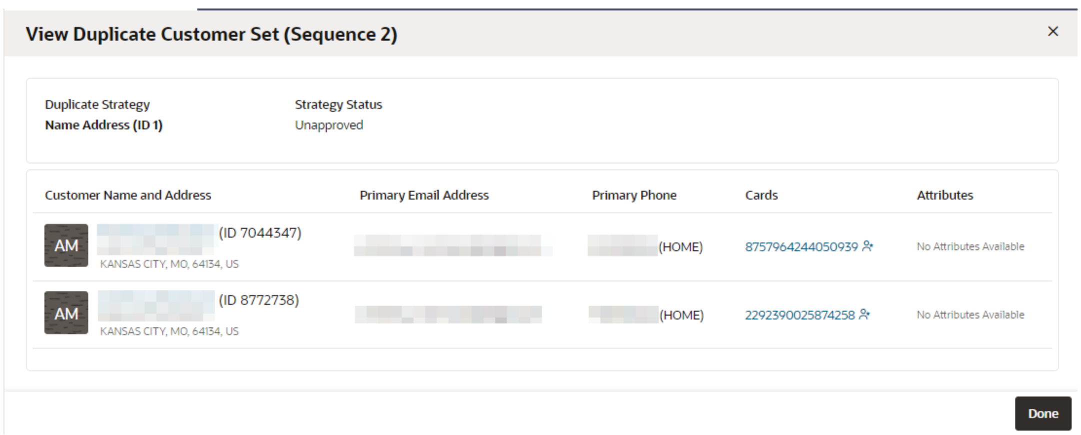
View Duplicate Sets

To view the customer records for a selected duplicate set, so that you can evaluate whether they should be merged.:

1. Select **View** from the Customer Merge Review Actions menu.

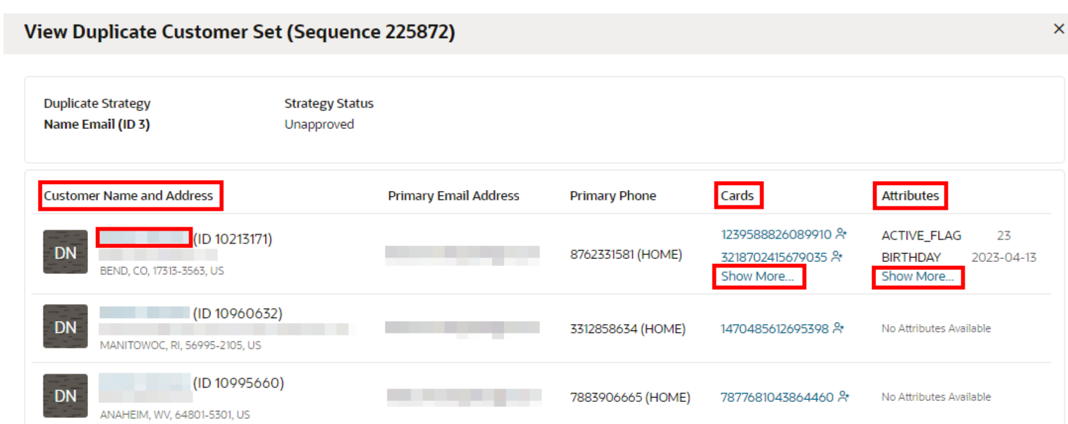
   Result: The View Duplicate Customer Set window appears

   Figure 3-4 View Duplicate Customer Set



2. You can click the following links from this window:

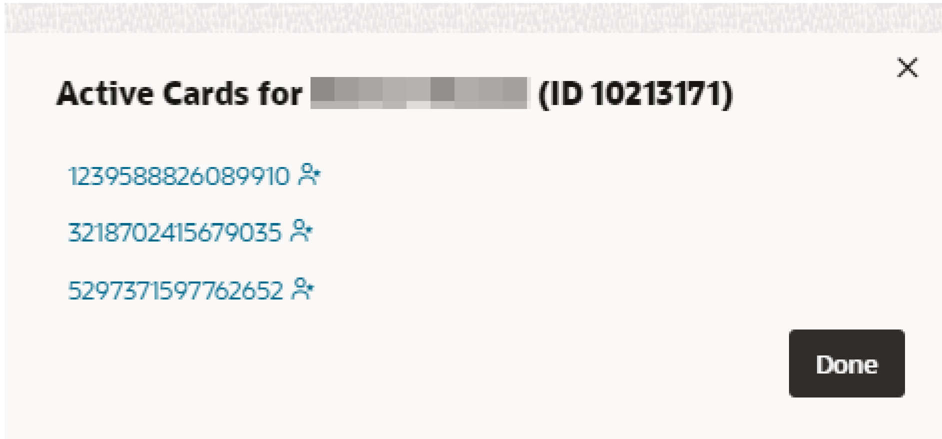
   Figure 3-5 View Options



   a. To view the Customer Dashboard, click the Customer Name from the Customer Name and Address column.

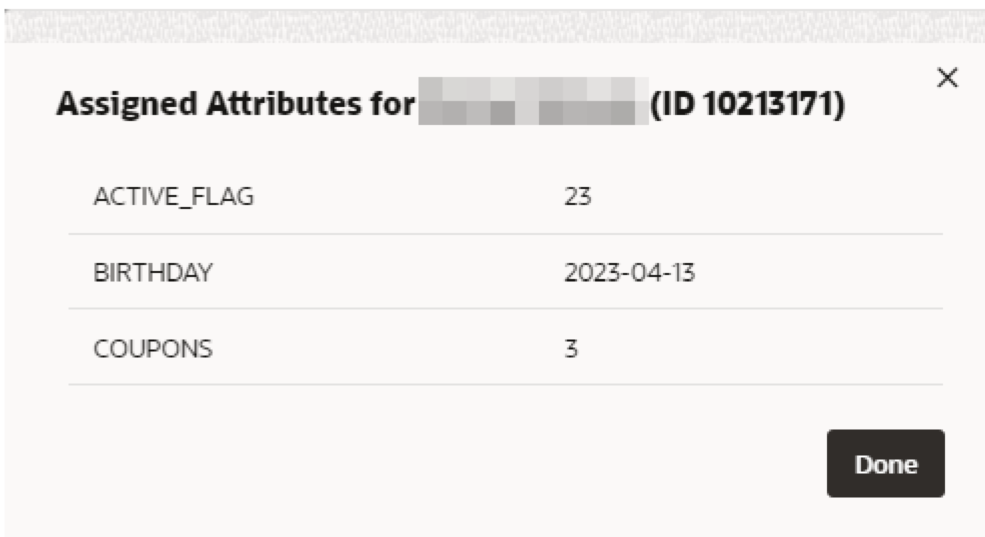
b. To view the Active Cards available when there are more that two assigned, click the Show More... link from the Cards column.

Figure 3-6 Active Cards



c. To view the Attributes when there are more than two assigned, click the Show More... link from the Attributes Column.

Figure 3-7 Assigned Attributes



3. Click **Done** to close the list of duplicate customer records.

4

Customer Search

Use the Customer Search page to find an existing customer to work with.

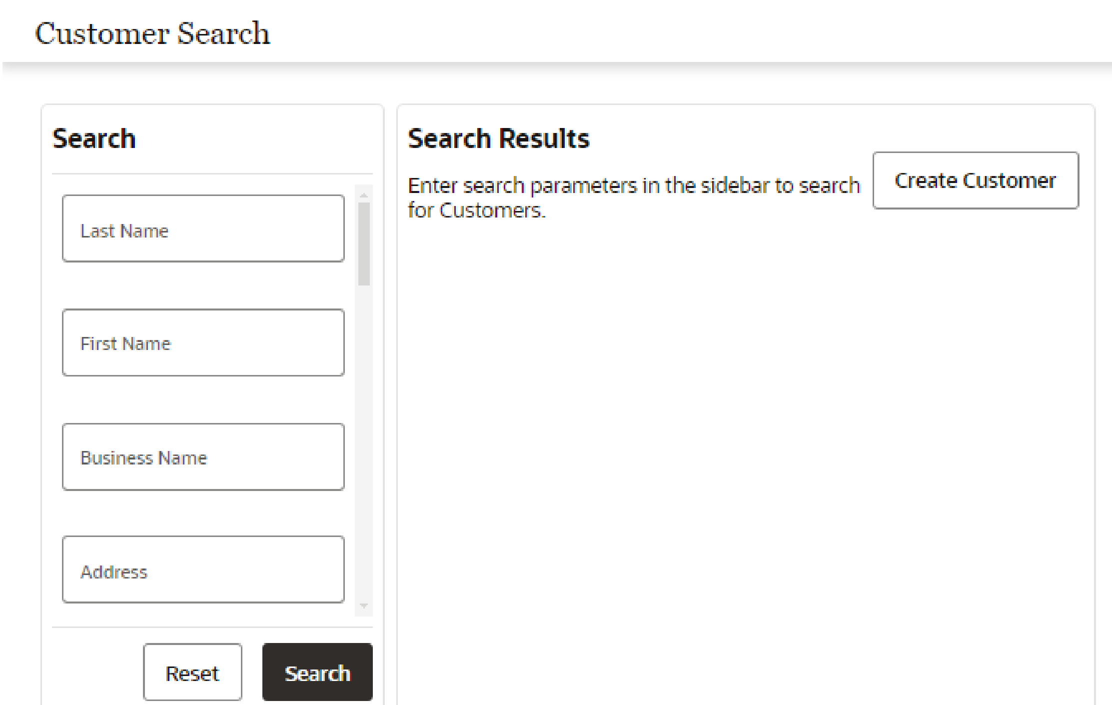
How to display this page:

- Select the **Customer Search** icon.
- Customer Search - You can search for customers using a number of criteria such as Name, Address, and Customer ID.
- Customers Found - Shows a list of customers retrieved based on the search criteria.

Customer Search

To search for a customer, enter any combination of the following search criteria and select Search. Optionally, select Reset to clear the entered search criteria.

Figure 4-1 Customer Search



Rules for Searching

- Matching: Unless otherwise indicated, the results are restricted to customer records that begin with your entry or match it exactly. For example, if you enter a postal code of 2050, the results include customers whose postal codes are 20501 or 20502.

- Case: Searching is **case-insensitive**.
- Searches for primary records only: In cases where the customer can have a primary record and additional records, such as address, email or phone number, the customer is included in search results only if the primary record matches. For example, if the postal code for the customer's primary address is 01602, but the customer also has an additional address in postal code 01609, the customer is not included in the search results if you search on postal code 01609.

> **Note:**
>
> Be as specific as possible when entering search information. The more specific the information, the fewer customer records are returned

Search Criteria

- **Last Name** - Customer last name.
- **First Name** - Customer first name.
- **Business Name** - Name of the customer's business.
- **Address** - Address line for the customer. Searches address line 1 in the customer's primary address.s
- **City** - City of the customer's primary address.
- **State** - State or province of the customer's primary address.
- **Postal Code** - Postal Code or ZIP Code of the customer's primary address.
- **Email Address** - Customer's primary email address.
- **Phone Number** - Customer's primary telephone number.
- **Second First Name** - Customer's second first name.

> **Note:**
>
> This field appears only if the system is configured to display additional customer names. See the Implementation Guide for more information.

- **Second Last Name** - Customer's second last name.

> **Note:**
>
> This field appears only if the system is configured to display additional customer names. See the Implementation Guide for more information.

- **Customer ID** - A unique identifier assigned by Customer Engagement. Searching on customer ID requires an exact match.

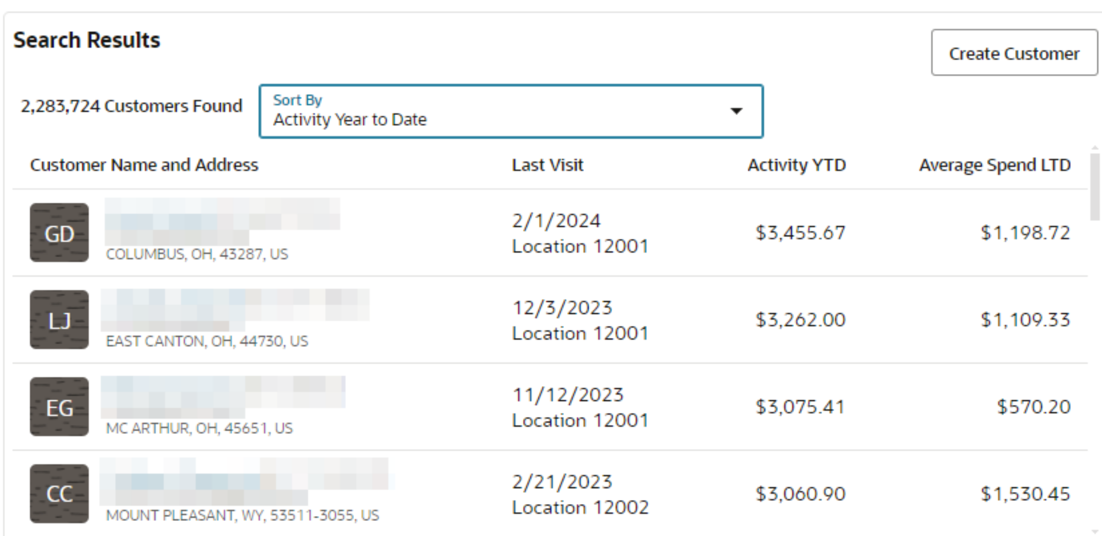
- **Alternate Key** - Customer Alternate Key. A unique identifier assigned to identify the customer in an integrating system. Searching on Alternate Key requires an exact match.
- **Card Number -** Card Number associated with the customer. Searching on card number requires an exact match.
- **Card Serial Number -** Serial Number of the card associated with the customer. Searching on card serial number requires an exact match.
- **Associate ID** - ID of an Associate assigned to the customer. Searching on associate ID requires an exact match.
- **Segment** - Name and ID of a customer segment. Segments are listed alphabetically by Segment Name in ascending order with All segments at the top. Optionally, select an existing segment from the list to restrict results to customers in the segment, or leave this field set to All.
- **Franchisee** - Name of the Franchisee. Franchisees are listed alphanumerically by franchisee name. Optionally, select a franchisee from the list to restrict results to customers associated with the franchisee, or leave this field set to All.

> **Note:**
>
> This field appears only if the Franchisee Support is enabled. See the Implementation Guide for more information.

Customers Found

The customer records matching the search criteria are displayed under Customers Found.

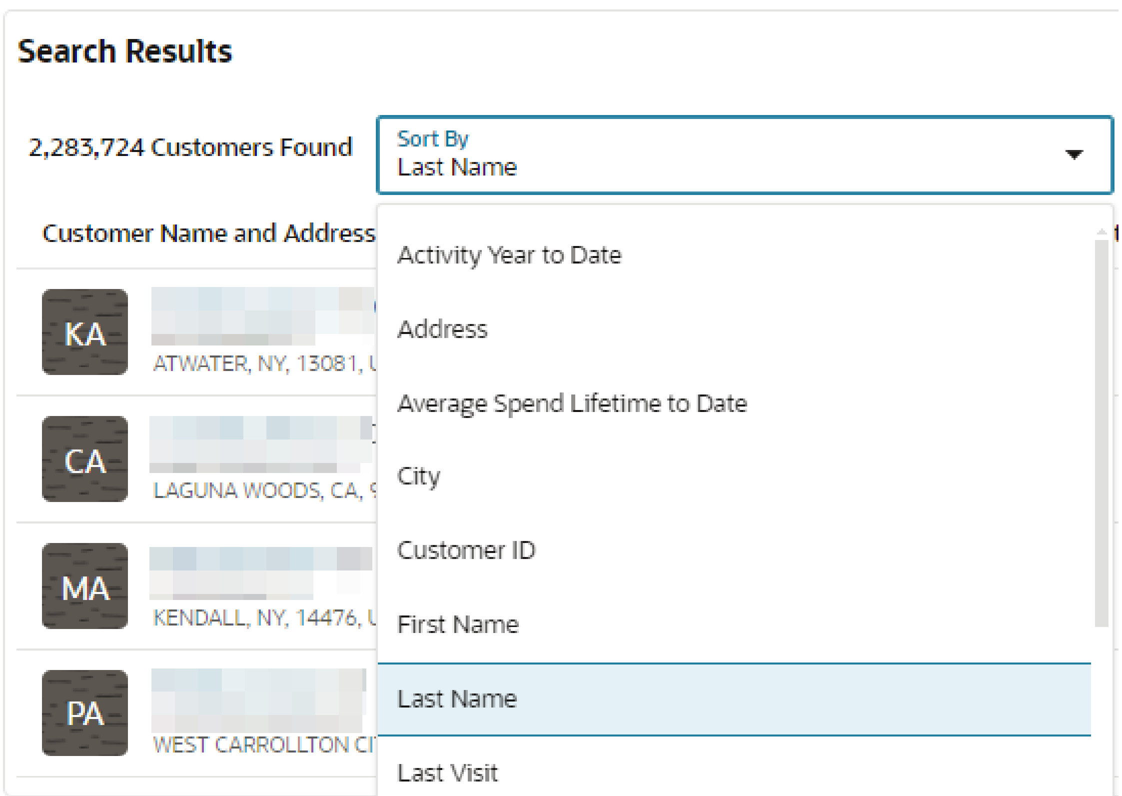
Figure 4-2 Customers Found List



- Customer image or initials - Displays:
  - The image of the customer, if it has been identified. Otherwise,

- The customer's initial(s), if the customer's first or last name, or both, are known. Otherwise,
- A customer icon if the customer record has no first or last name (for example, a business).
- The customer image or initials provides a link to the Customer Dashboard.
- Customer name - The customer first and last name, if any.
- The customer name provides a link to the Customer Dashboard. This option is not available if the customer record has no first or last name (for example, a business).
- Customer address - Values include, Address 1, Address 2, City, State/Province, Postal Code, and country, if they exist. If the customer does not have a primary address, the message `No Address Available` is displayed.
- Last Visit - The date of the customer's last purchase.
- Activity YTD - The total amount of the customer's purchases year-to-date, displayed in the base system currency.
- Average Spend LTD - The average amount of the customer's purchases life-to-date (the total amount of the customer's purchases life-to-date divided by the number of purchases). Displayed in the base system currency.

Figure 4-3 Sort-by Options



Sorting Customers

You can use the Sort by drop-down list to sort the list of Customers found by the following options:

- **Average Spend LTD** - Select this option to list customers in descending order by average spend life-to-date (the total amount of the customer's purchases life-to-date divided by the number of purchases).
- **Activity YTD** - The total amount of the customer's purchases year-to-date, displayed in the base system currency.
- **Last Visit** - Select this option to list customers in descending order by the date of last visit (purchase).
- **Last Name** [default] - Leave this option selected to list customers alphabetically by last name.
- **First Name** - Select this option to list customers alphabetically by first name.
- **Address** - Select this option to list customers alphanumerically by street address.
- **City** - Select this option to list customers alphabetically by city name. Customers in the same city are listed alphabetically by last name.
- **State** - Select this option to list customers alphabetically by state or province. Customers in the same state or province are listed alphabetically by last name.

Displaying a Customer in the Customer Dashboard

There are two ways to access the Customer Dashboard. In Task Management, use the Search panel to list tasks. The customer names appear as a link that you can click. You can also click a customer name or image icon in the Customers found list to view more information about them in the Customer Dashboard.

Creating a New Customer

Click the Create Customer button to create a new customer. This displays a blank Customer Details page for the new customer. See Customer Information for details about the information that can be entered on this page.

Customer Validation

Whenever a new Customer is added or updated, the Customer information (first name, last name, prefix, suffix, gender, address, postal code, email address and phone number) is validated. If any of the information provided does not meet the criteria of the Customer Engagement application, the Customer, address, phone, or email address is marked as invalid and a validation error is recorded. This does not affect how the information is saved or used; it just means the information did not meet the criteria.

> **Note:**
>
> The Customer validation process is determined by configuration, including whether or not validation is performed. Refer to the `Customer Engagement Cloud Services Implementation Guide` for more information, or contact your Project Manager.

Rules for Entering Customer Information

Follow these rules to ensure that the customer information entered is valid:

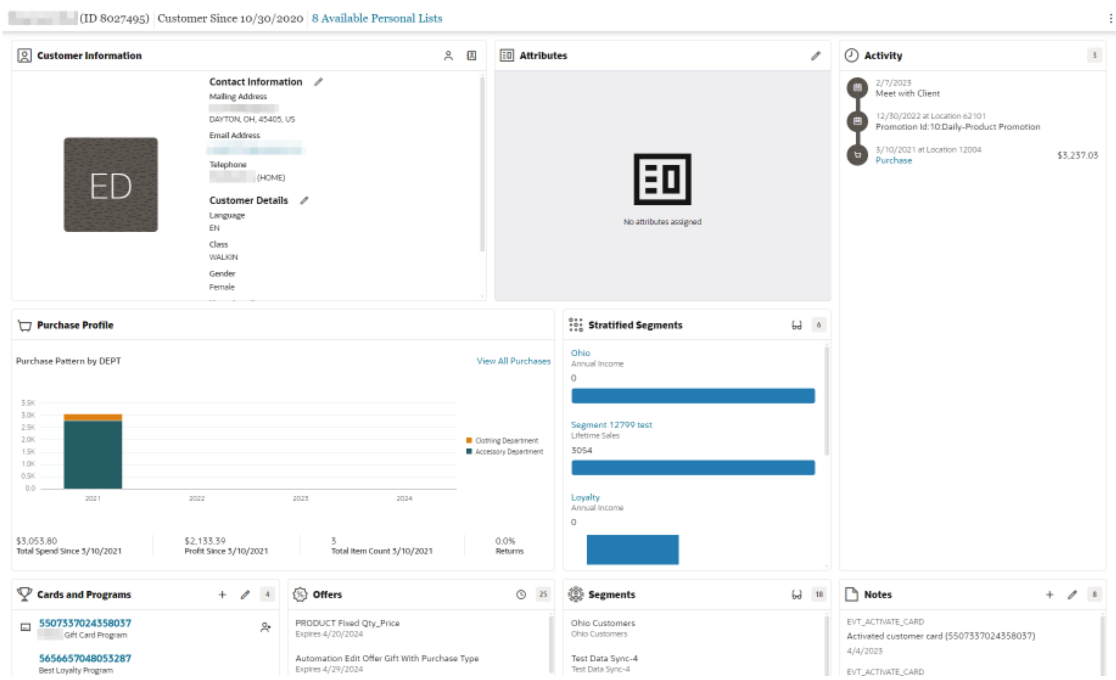
- **Names** - The first letter of each name, if applicable, is capitalized.
- **Prefix** (Salutation) - The user can enter anything for a prefix.
- **Suffix** - The user can enter anything for a suffix.
- **Gender** - When adding a new customer, select Male or Female from the list.
- **Address** - Address lines can be left blank.
- **Postal Code** - The user can enter anything for a postal code.
- **Email Address** - The system looks for an @ symbol in the email address. If found, the system verifies that the email address is in the proper format: accountname@sub-domain.domain. If the email address is in the wrong format, the email address is marked as invalid and a validation error is generated.
- **Phone** - The application looks for and removes any non-numeric character except for E, e, X, x, T, or t. Any leading 1 (one) characters are removed.

5 Customer Dashboard

Use the Customer Dashboard to look up the information available for a customer and to edit customer information.

The Customer Dashboard is displayed when you look up a customer. See Customer Search. You can also link from the customer name or image icon in the Customer List on the Home page.

Figure 5-1 Customer Dashboard



Information on the Customer Dashboard is divided into these sections:

- The header bar displays the Customer Name and ID, Sign Up Date, Personal Lists, Number in Customer Household and Actions menu.
- **Customer Information** - Basic information about the customer, such as mailing addresses, email addresses and phone numbers. See Customer Information.
- **Attributes** - Information that helps to characterize the customer, such as birth month and marital status. See Attributes.
- **Activity** - Shows current and upcoming customer tasks. See Activity.
- **Purchase Profile** - Shows purchase pattern of the customer by revenue center over a year. See Purchase Profile.
- **Stratified Segments** - Shows the stratified segments in which the customer is grouped. See Stratified Segments.

- **Cards and Programs** - Includes information for each program where the customer has an account. See Cards and Programs.
- **Offers** - Shows current offers for the customer. See Offers.
- **Segments** - Segments define groups of customers. This section shows the segments to which the customer belongs. See Segments.
- **Notes** - Provides information about all of the notes written about the Customer. See Notes.

Customer Household

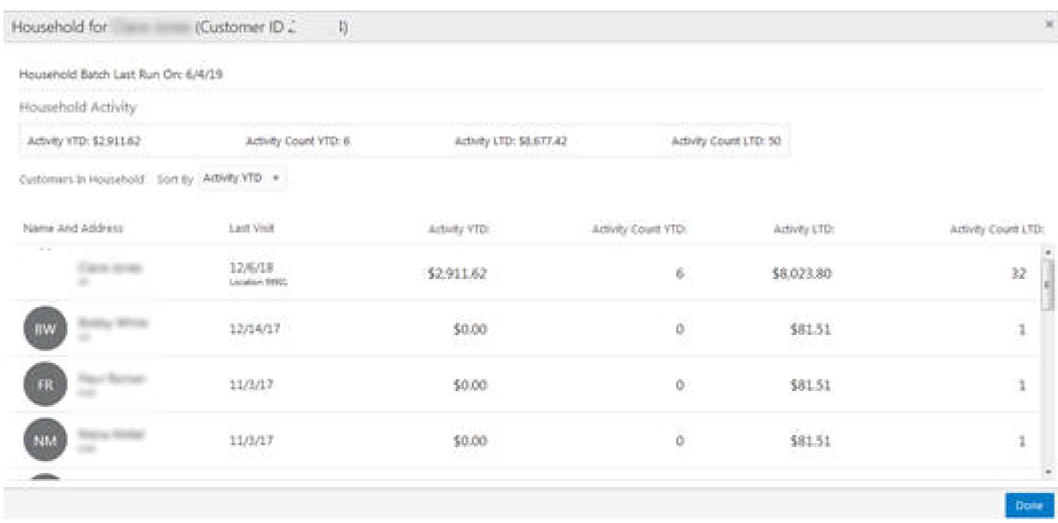
The Customer Household includes members of a household that a customer is a part of, so that it is possible to direct marketing efforts to a household, rather than each individual member. Household members can be included in this list if they share the same last name and address, or if they only share the same address.

Viewing the Customer Household List

To display the Customer Household list:

1. Display the customer in the Customer Dashboard, for example by clicking on the customer name or image in the Customer List.
2. In the header of the Customer Dashboard, look for the (Number) in Household link. This link will only display if there is more than one household member.
3. Click the (Number) in Household link. This displays the Customer Household list:

Figure 5-2 Customer Household



The Household list displays the following view-only information:

- Household Activity - Summarizes the transaction activity of the household by these metrics:
  - Activity YTD – The amount of the total year-to-date transaction activity for the whole household.
  - Activity Count YTD – The number of transactions for the whole household for the year to date.

  - Activity LTD – The amount of the total life-to-date transaction activity for the whole household.
  - Activity Count LTD – The number of life-to-date transactions for the whole household.
- You can sort by the above Household Activity metrics by selecting from these items on the Sort By drop-down list.
  - Activity YTD
  - Activity Count YTD
  - Activity LTD
  - Activity Count LTD
- Name and Address – The name and address of the household member, and the customer image, if available.
- Last Visit – The last date the customer made a purchase.
- Activity YTD – The amount of the total year-to-date transaction activity for the household member.
- Activity Count YTD – The household member's number of transactions for the year to date.
- Activity Count LTD – The household member's number of life-to-date transactions.

4. Use the scroll bars to display hidden information. Click **Done** when you are done viewing the list. This returns you to the Customer Dashboard.

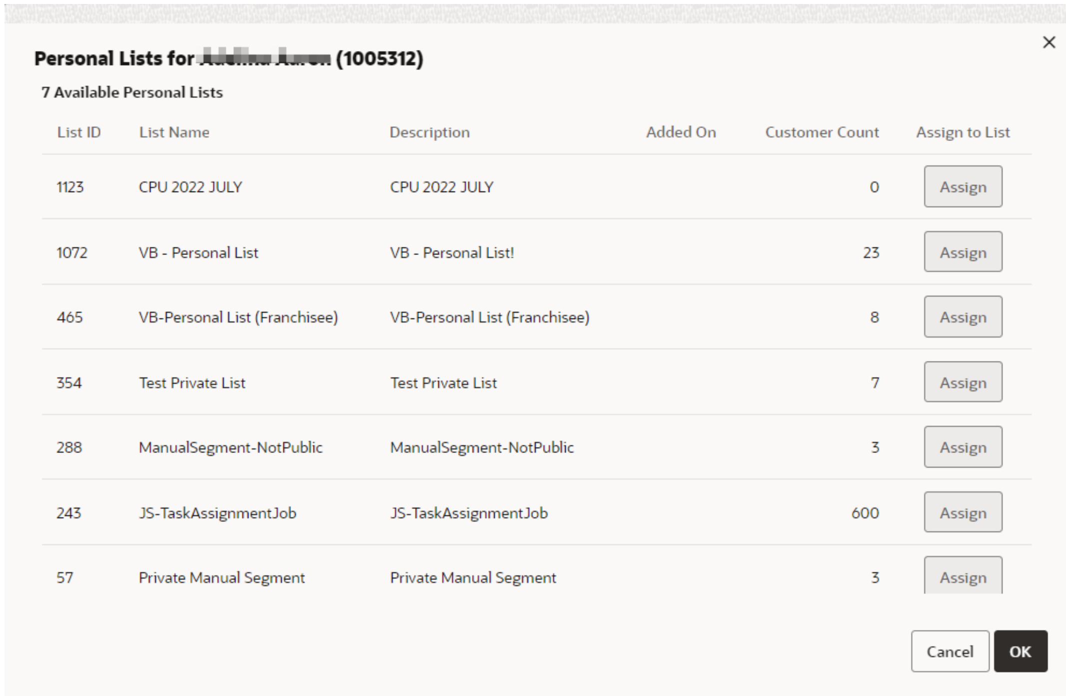
Personal Lists

The Personal List provides information about all the user-created personal lists (previously known as manual segments) to which the user can associate customers. The Personal Lists link at the top of the Customer Dashboard displays all the private lists created by the associate to which the customer may be assigned.

To Assign and Unassign Personal Lists:

1. Click the (#) Available Personal Lists link at the top of the Customer Dashboard. This displays the associate's available Personal Lists, with the ones that include the customer listed first.

Figure 5-3 Personal Lists for Customer



The Personal Lists for Customer pop-up window displays this information:

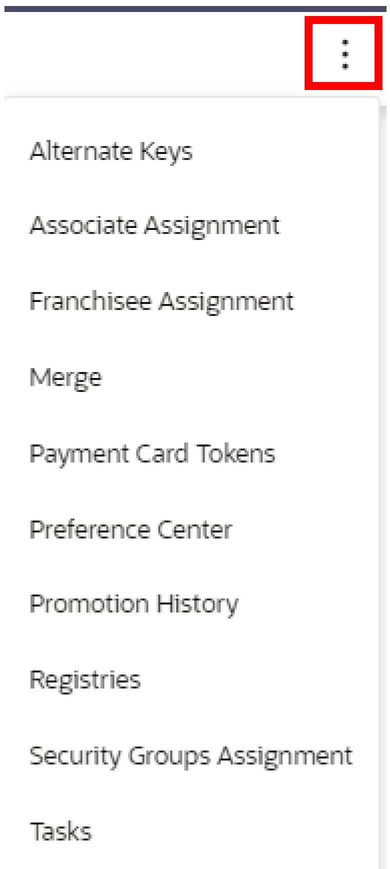
- Sorted by Customer Added On date and then by List ID, in descending order
- Customer Bar
  - The number of Available Personal Lists for the customer
  - Customer Name and ID
- Available Personal Lists Grid
  - List ID – ID of the list
  - List Name – Name of the List
  - Description – Description of the list
  - Added On – The date on which the customer was added to the list
  - Customer Count – The number of customers on that list.
  - Assign to List – Buttons for assigning (Assign) and removing (Unassign)
- Scroll bars are available if there are more lists than will fit on the window.

2. Add or remove the customer from a list:
   - Click **Assign** to assign a customer to a list
   - Click **Unassign** to remove a customer from a list.
3. Click **OK** when you are done. This returns you to the Customer Dashboard.

Actions Menu

The actions menu at the top of the Customer Dashboard provides access to several tasks associated with customer management.

Figure 5-4   Actions Menu



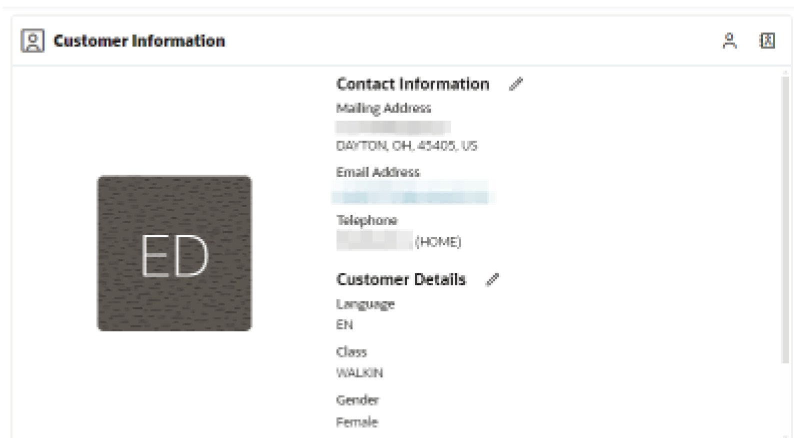
- Alternate Keys - Displays the Alternate Keys window for the customer displayed in the Customer Dashboard. See: Alternate Keys
- Associate Assignment - Displays the Associate Assignment window for the customer displayed in the Customer Dashboard. See: Associate Assignment
- Franchisee Assignment - Displays the Franchisee Assignment window for the customer displayed in the Customer Dashboard. This option is only displayed if the associate has access to at least one franchisee. See: Franchisee Assignment
- Merge - Displays the Customer Merge window for the customer displayed in the Customer Dashboard. See: Merge
- Payment Card Tokens - Displays the payment card tokens window for the customer displayed in the Customer Dashboard. See Payment Card Tokens.
- Preference Center - Displays the Preference Center window for the customer displayed in the Customer Dashboard. See: Preference Center
- Promotion History - Displays the Promotion History window for the customer displayed in the Customer Dashboard. See: Promotion History

- Registries - Displays the Registries window for the customer displayed in the Customer Dashboard. See: Registries
- Security Groups Assignment - Provides the ability to assign or unassign a Security Group to a customer, so that customer details will be protected based on the privileges for the assigned security group. See: Security Groups Assignment
- Tasks - Displays the Customer Tasks window for the customer displayed in the Customer Dashboard. See: Tasks

Customer Information

The Customer Information area of the Customer Dashboard includes contact information and other details about the customer.

Figure 5-5 Customer Information



- Use the scroll bar or up and down arrow keys to move through the information.
- If the user has read-only access, the View icon is displayed instead of the Edit icon.

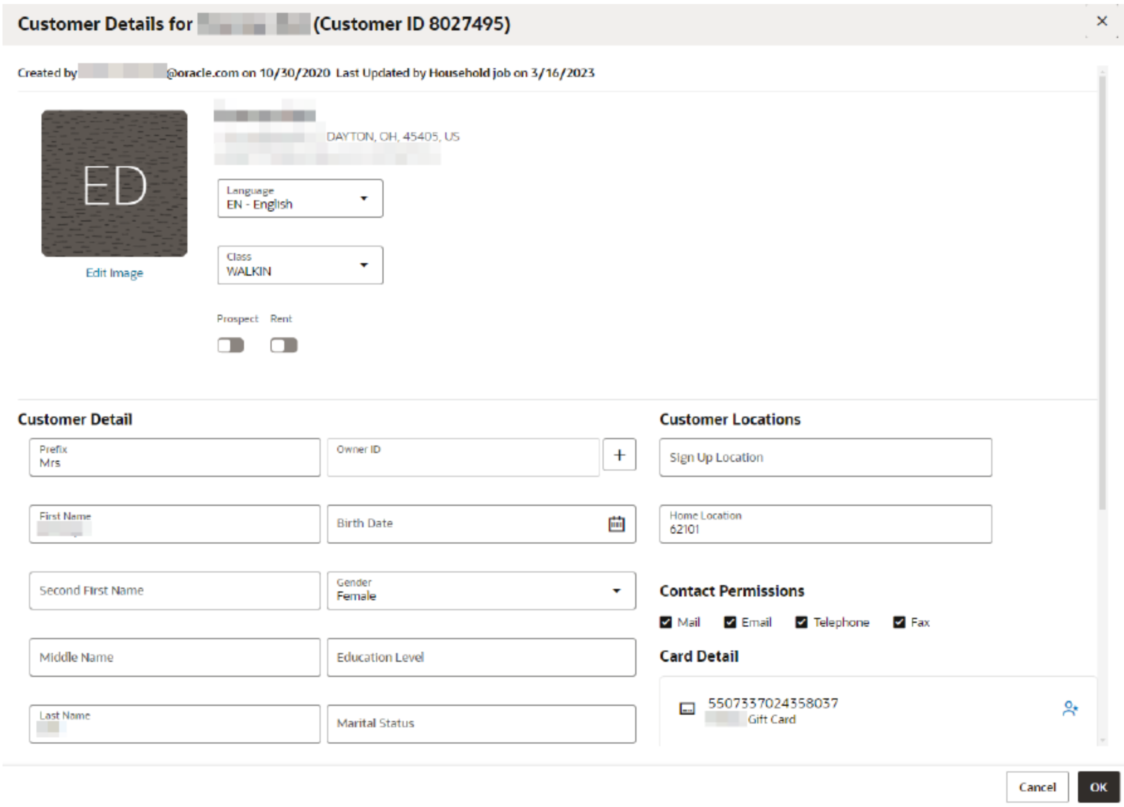
Emailing a Customer

Click the Email Address link in the customer information panel to send a message to a customer. This link uses the client email server. After you send the message, you are returned to the Customer Information panel.

Editing Customer Details

To edit Customer Details, click the Customer Details icon at the top of the panel next to Customer Information, or the Pencil icon next to Customer Details. This opens an editable Customer Details panel.

Figure 5-6 Customer Details Editing

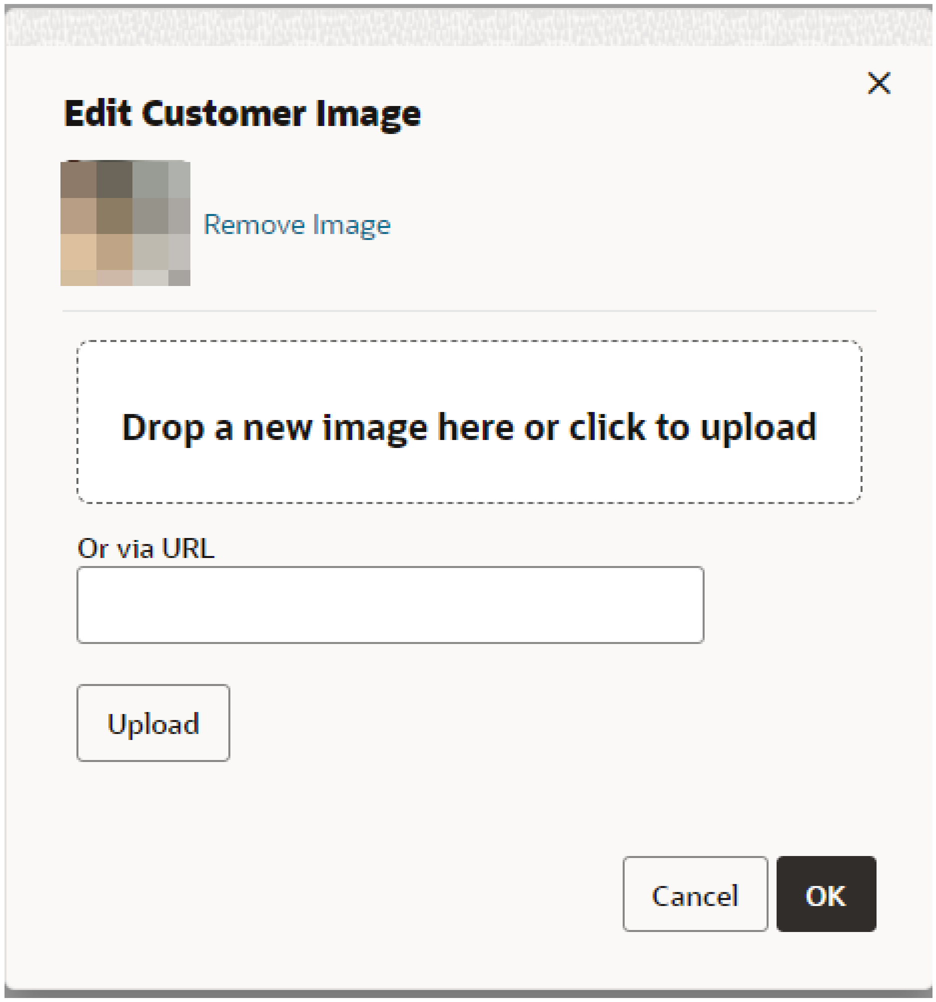


A customer image, if provided, is displayed in the top left of this panel.

To edit the customer image:

1. Under the customer image, click **Edit Image**. This displays a dialog for uploading an image.

Figure 5-7 Edit Customer Image



2. Select an image and drag it into the top box. Alternatively, you can enter a URL for the image file in the or via URL field, and click **Upload**.
3. When you have selected the new image file, click OK.
4. For all other items, enter the information in the fields that need updating and click **OK**.

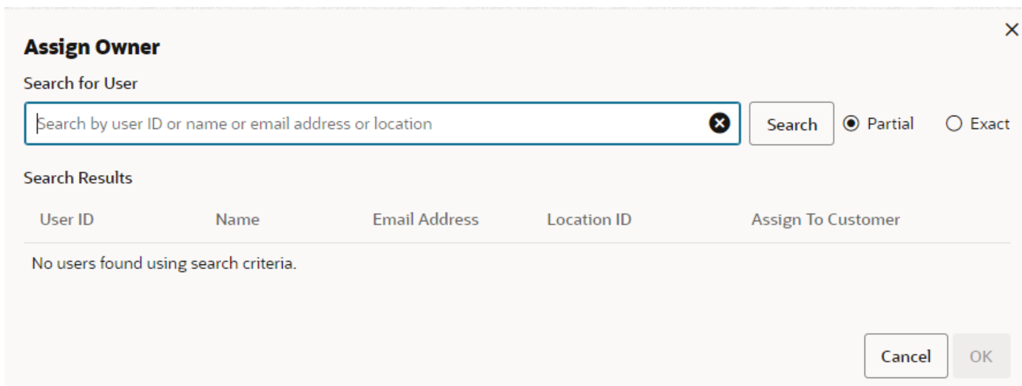
Customer Detail information includes the following:

Customer Details

- **Language** – The customer's preferred language (required).
- **Class** – The class to which the customer belongs (required).
- **Prospect** – Indicates whether the customer is a prospect.
- **Rent** – Indicates whether the customer name can be rented to other companies for prospecting efforts.
- **Prefix** – Prefix to the customer name.
- **First Name** – First name for the customer.
- **Second First Name** – A second first name for the customer, if provided.
- **Middle Name** – Middle name or middle initial for the customer.

- **Last Name** – Last name for the customer.
- **Second Last Name** – A second last name for the customer, if provided.
- **Suffix** – Suffix to the customer name.
- **Business Name** – Name of the business associated with the customer.
- **Organization Name** – Name of the organization associated with the customer.
- **Organization Type** – Type of organization associated with the customer.
- **Owner ID** - Used to control the associate able to assign one or more security groups to a customer. Do the following to add an Owner ID:
  1. Click the Owner ID **Assign Owner Add** icon. Result: The Assign Owner window appears.

     Figure 5-8 Assign Owner

  2. In the Search for User field, enter the **User ID**, **Name**, **Email Address**, or **Location** of the user you want to search for. Click **Partial** to search for users that partially match the search text, or click **Exact**, to search for an exact match.
  3. Click **Assign** for the user you wish to assign to the customer.
  4. When you are finished assigning a user, you can either click **OK** to close the window and save the changes or click **Cancel** to close the window without saving the changes.

> **Note:**
>
> Click **Unassign** to remove an existing user assigned to a customer. This enables you to assign a new user. Each customer can only have one user assigned as an owner.

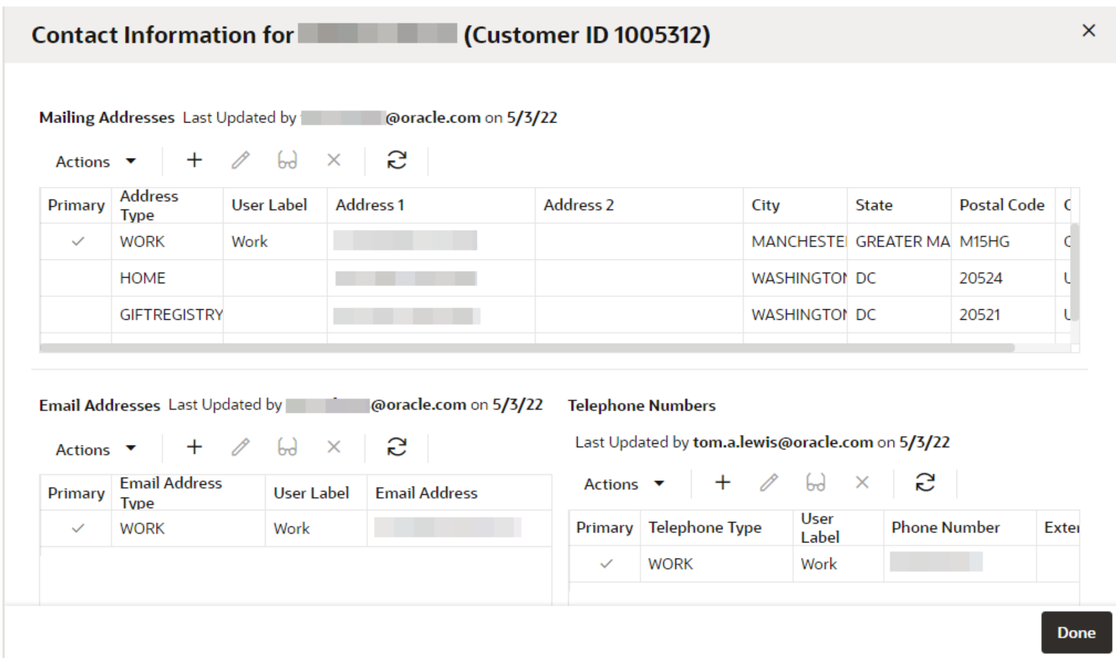
- **Birth Date** – Date of birth of the customer.
- **Gender** – Customer gender.
- **Education Level** – Highest level of education completed by the customer.
- **Marital Status** – Current marital status of the customer.
- **Anniversary** – Customer anniversary date.
- **Ethnicity** – Customer ethnicity.
- **Annual Income** – Customer's annual income.

- **Net Worth** – Net worth of the customer.
- **Signup Location** – Location where the customer signed up.
- **Home Location** – Home location for the customer.
- **Contact Permissions** – The methods by which the customer has given permission to be contacted. Check the box next to each allowed method.
- **Card Detail** – Details on card associated with the customer

Editing Customer Contact Information

To edit the customer's contact information, click the Edit icon next to Contact Information. This opens an editable Contact Information panel.

Figure 5-9 Edit Customer Contact Information



Customer Contact information includes the following:

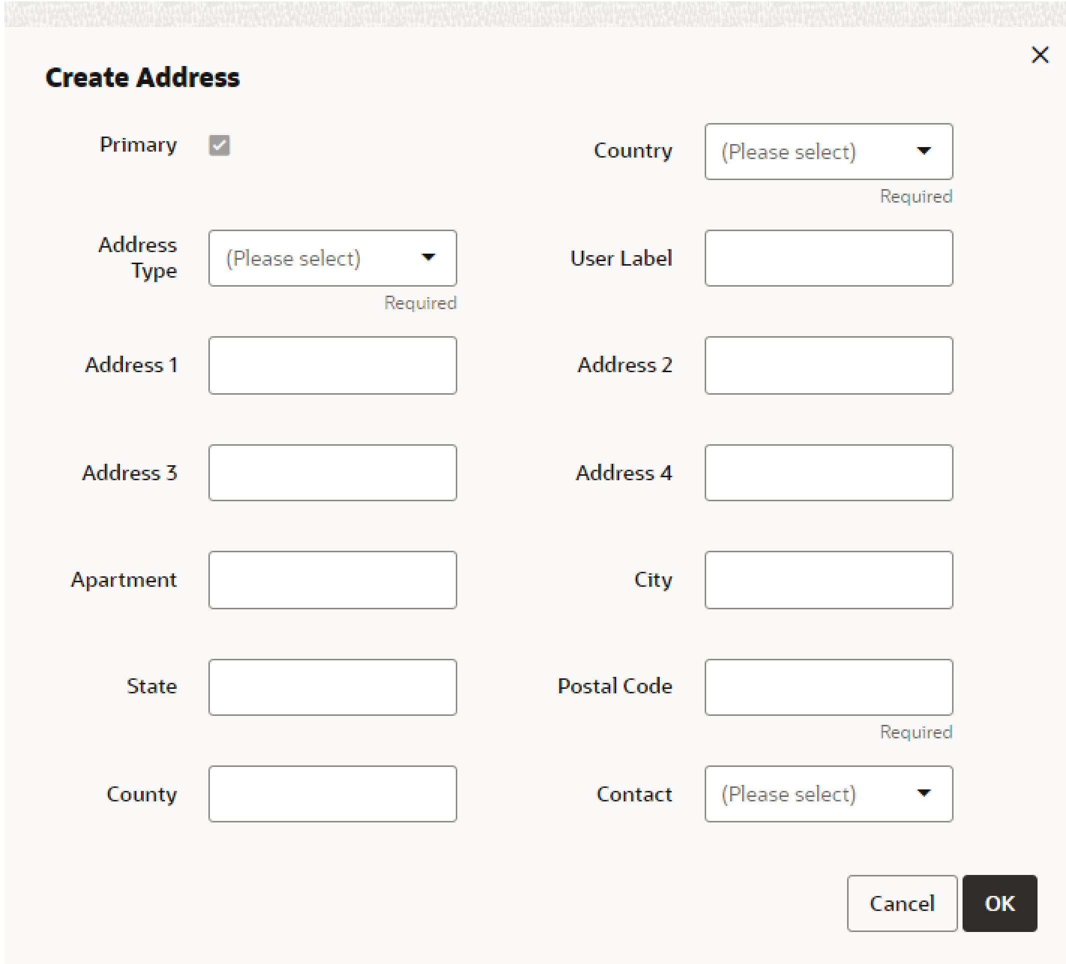
- **Mailing Addresses** - All mailing addresses of the customer.
- **Email Addresses** - All email addresses of the customer.
- **Telephone Numbers** - All telephone numbers of the customer.

Add, Edit, or Delete a Mailing Address:

To create a new mailing address:

1. In the Contact Information editing panel under Mailing Addresses, choose **Create Address** from the Actions menu, or click the **Add (+)** icon. This opens a Create Address dialog.

Figure 5-10 Create Address Dialog



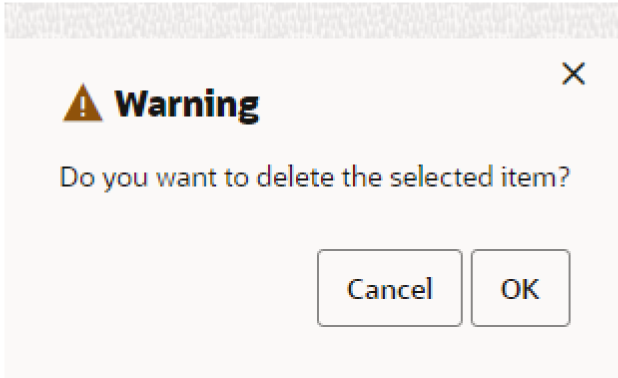
2. Enter the information for the new address (see Step 2 in Editing a Mailing Address) and click **OK**. The new address is displayed at the top of the Mailing Address list, because the Primary flag is automatically defaulted when adding a new mailing address.

   The Primary field for any address that was previously the primary address is de-selected.

To delete a mailing address:

1. In the Contact Information editing panel under Mailing Addresses, select the address you want to delete.
2. Choose **Delete Address** from the Actions menu, or click the **Delete** icon. This displays a Warning message:

Figure 5-11 Warning

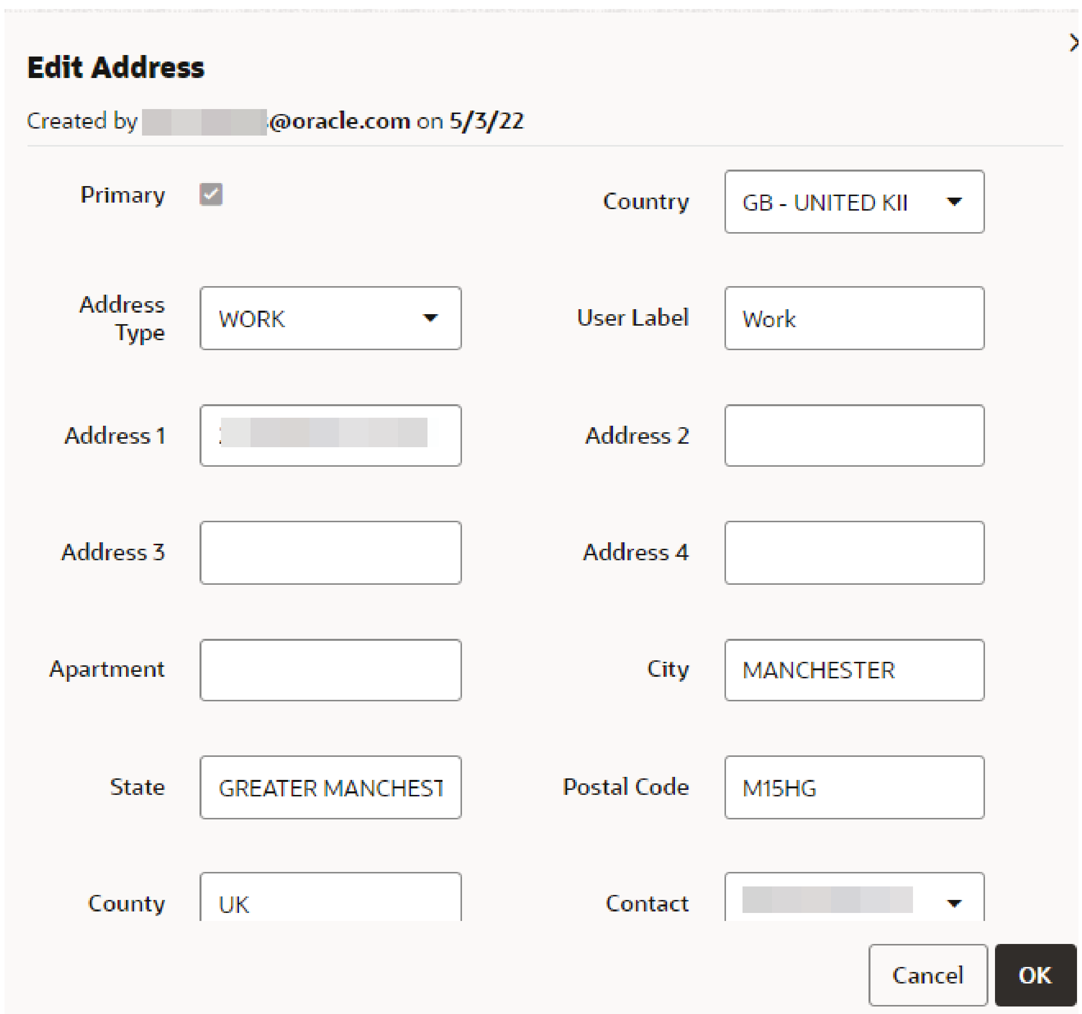


3. In the Warning message, click **OK**. The address is deleted from the Mailing Addresses list.

To edit a mailing address:

1. In the Contact Information editing panel under Mailing Addresses, choose **Edit Address** from the Actions menu, or click the **Edit** icon. This opens an Edit Address dialog:

Figure 5-12 Edit Address Dialog



2. Edit the information for the address (see Step 2 in Editing a Mailing Address) and click **OK**. The edited information is displayed in the Mailing Addresses list.

   If the Primary check box for the address that you are editing was selected, the Primary check box is disabled in the Edit Address dialog. If the Primary check box for the address that you are editing was not selected, the Primary check box is enabled in the Edit Address dialog. To set an address as the new Primary address, select the Primary check box when editing.

   The Create and Edit Mailing Address dialogs display the following information:

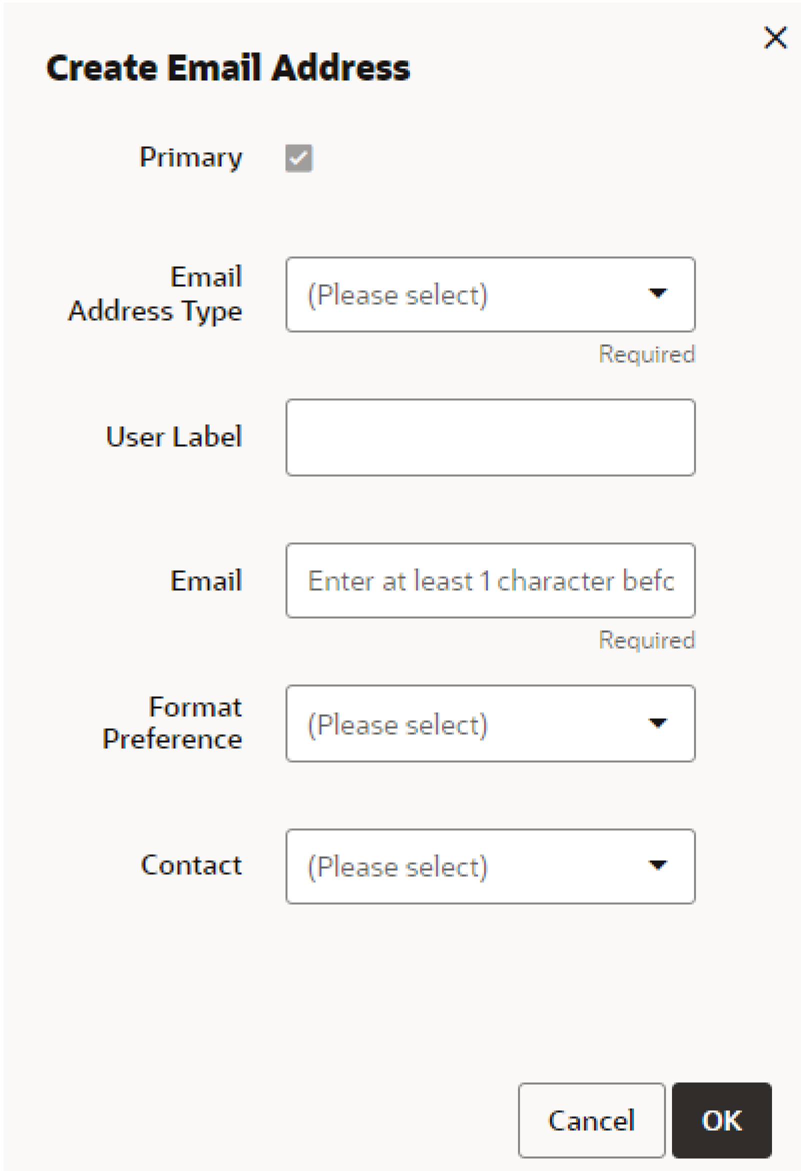
   - **Primary** – Indicates whether this is the primary address for the customer.
   - **Country** – The country for the customer address. Select a country from the drop-down list (required).
   - **Address Type** – Indicates the type of address, such as Home or Business. Select a type from the drop-down list (required).
   - **User Label** – User label for the address.
   - **Address 1-4** – The street number in the address. You can enter up to four addresses, for example, suite or office number.
   - **Apartment** – The apartment number, if applicable.
   - **City** – The city for the customer address.
   - **State** – The state for the customer address.
   - **Postal Code** – The postal code for the customer address (required).
   - **County** – The County for the customer address.
   - **Contact** – The contact rule for the address. Select a contact preference from the drop-down list.

Add, Edit, or Delete an Email Address:

To create a new email address

1. In the Contact Information editing panel under Email Addresses, choose **Create Email Address** from the Actions menu, or click the **Add** icon. This displays a Create Email Address dialog:

Figure 5-13 Create Email Address Dialog



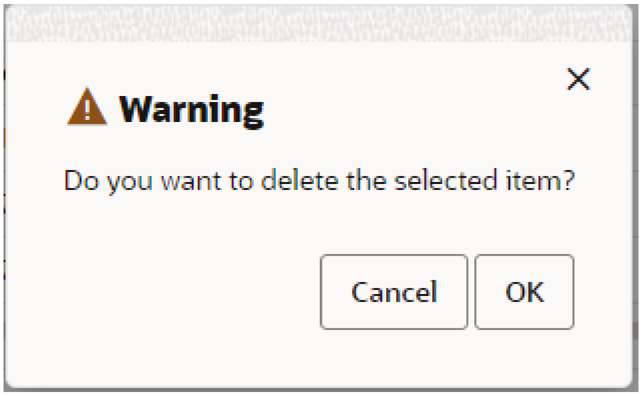
2. Enter the information for the new email address (see Step 2 in Editing an Email Address) and click **OK**. The Primary flag is automatically defaulted when adding a new email address, so the new email is displayed at the top of the Email Addresses list.

   The Primary field for any email that was previously the primary email is de-selected.

To delete an email address:

1. In the Contact Information editing panel under Email Addresses, select the email you want to delete.
2. Choose **Delete Email Address** from the Actions menu, or click the **Delete** icon. This displays a Warning message:

Figure 5-14   Warning

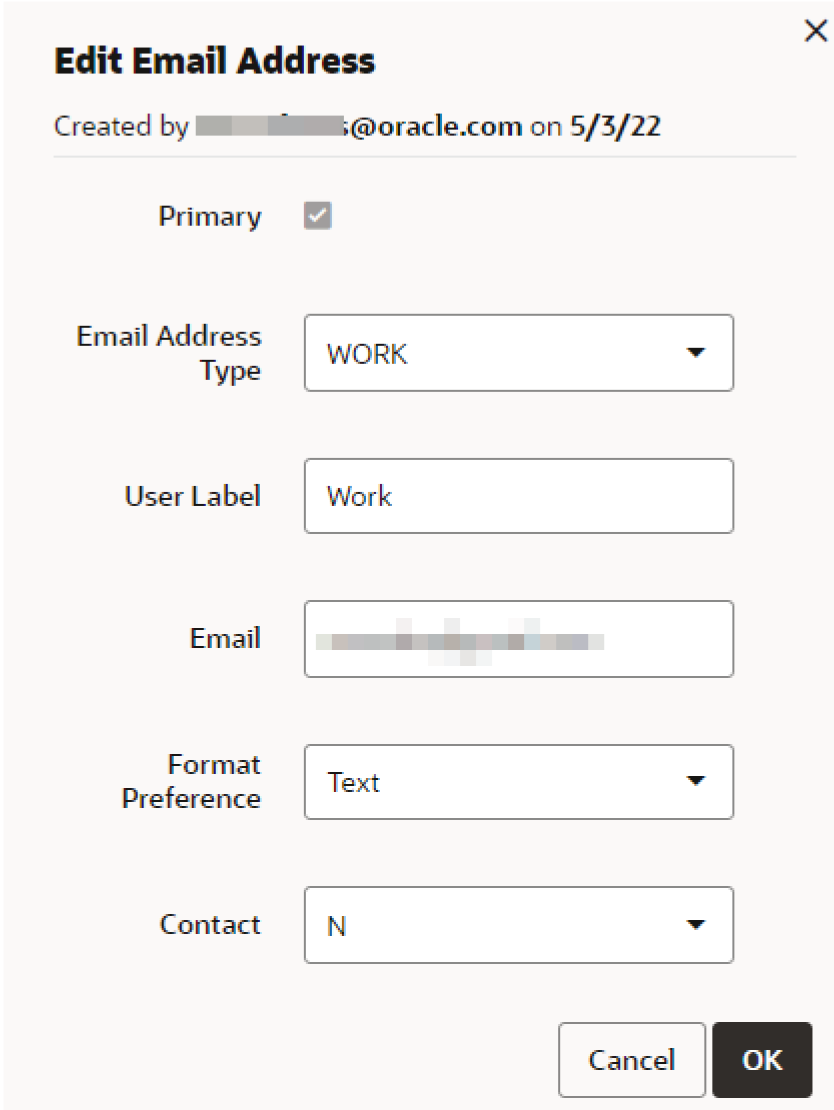


3. In the Warning message, click **OK**. The email is deleted from the Email Addresses list.

To edit an email address:

1. In the Contact Information editing panel under Email Addresses, select the email address you want to edit, and choose **Edit Email Address** from the Actions menu, or click the **Edit** icon. This opens an Edit Email dialog.

Figure 5-15   Edit Email Address Dialog



2. Edit the information for the email address (see Step 2 in Editing an Email Address)) and click **OK**. The edited information is displayed in the Email Addresses list.

   If the Primary check box is selected for the email address being edited, the Primary check box is disabled in the Edit Email Address dialog. If the Primary check box is not selected for the email address being edited, the Primary check box is enabled in the Edit Email Address dialog. To set an email address as the new primary email address, select the Primary check box when editing.

The Create and Edit Email Address dialogs display the following information:

- **Primary** – Indicates whether this is the primary email address for the customer.
- **Email Address Type** – The type of email address, for example, Home or Business. Select a type from the drop-down list (required).
- **User Label** – User label for the email address (required).
- **Email** – The email address (required).
- **Format Preference** – The preferred file format for receiving email messages. Select a format from the drop-down list.

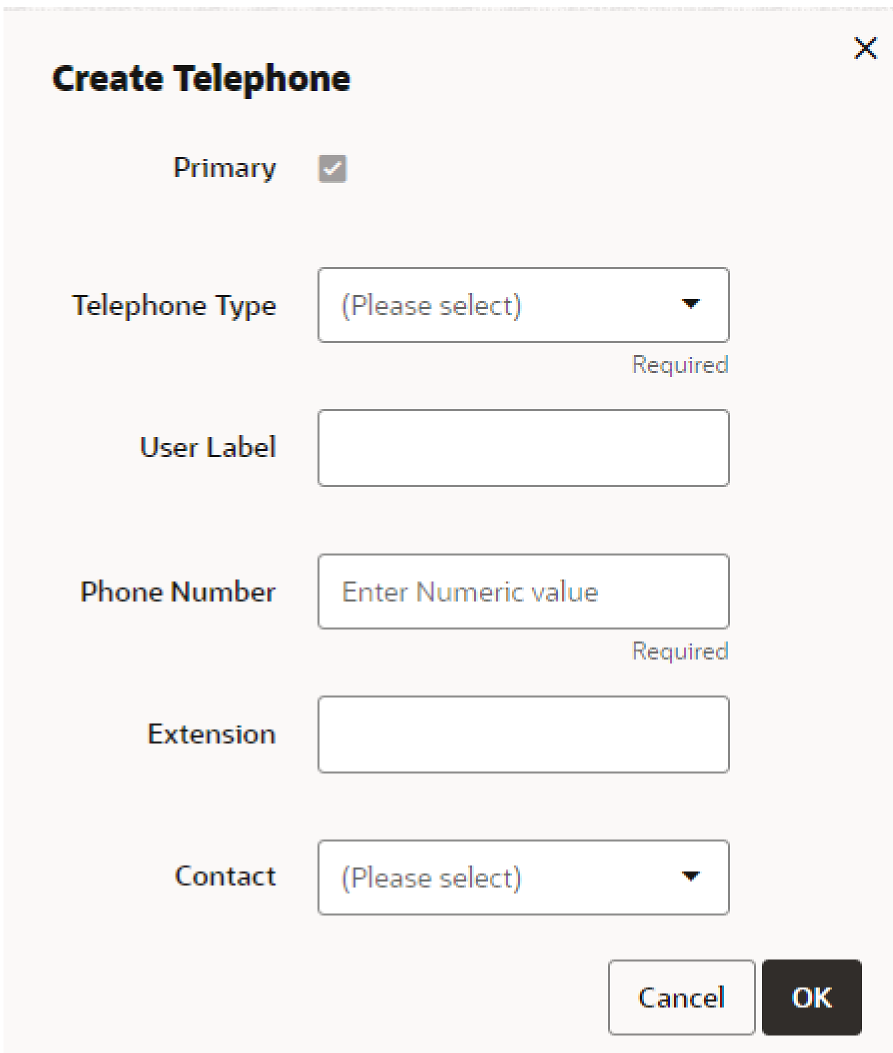
- **Contact** – The contact rule for the email address. Select a contact preference from the drop-down list.

Add, Edit, or Delete a Telephone Number

To create a new telephone number:

1. In the Contact Information editing panel under Telephone Numbers, choose **Create Telephone** from the Actions menu, or click the **Add** icon. This opens a Create Telephone dialog.

Figure 5-16 Create Telephone Dialog



2. Enter the information for the new number (see Step 2 in Editing a Telephone Number) and click **OK**. The Primary flag is automatically defaulted when adding a new telephone number, so the new number is displayed at the top of the Telephone Numbers list.

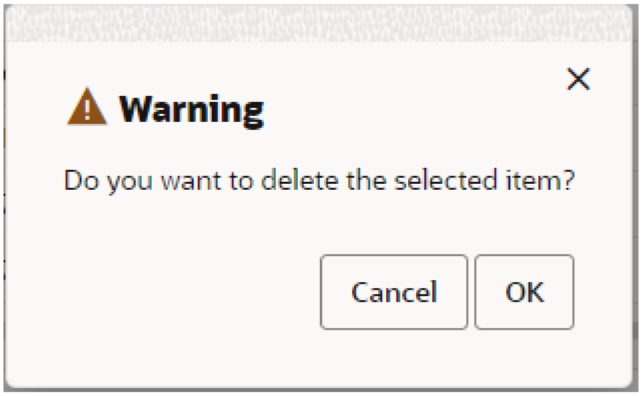
   The Primary field for any number that was previously the primary number is de-selected.

To delete a telephone number:

1. In the Contact Information editing panel under Telephone Numbers, select the number you want to delete.

2. Choose **Delete Telephone** from the Actions menu, or click the **Delete** icon. This displays a Warning message.

Figure 5-17 Warning

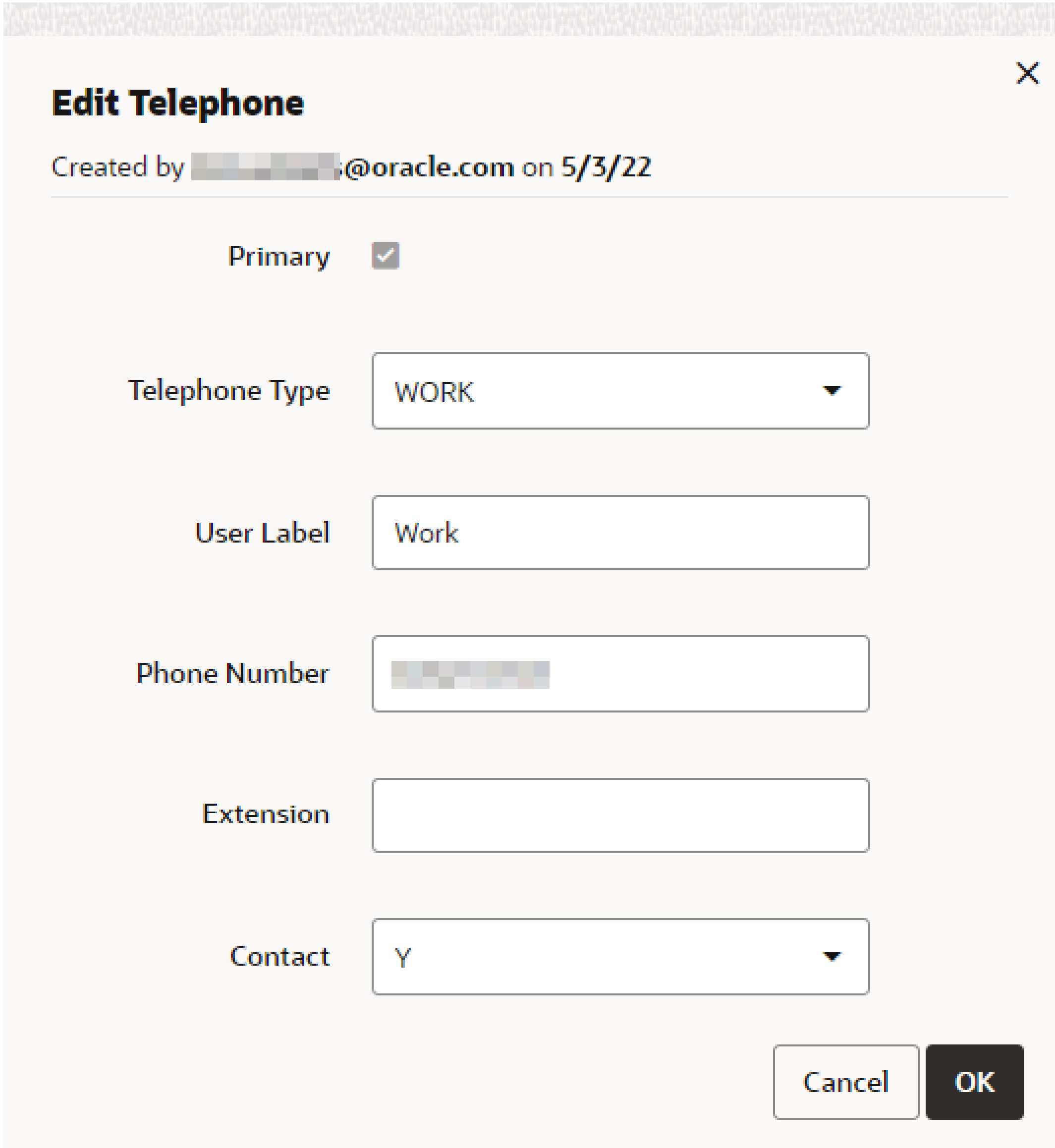


3. In the Warning message, click **OK**. The number is deleted from the Telephone Numbers list.

To edit a telephone number:

1. In the Contact Information editing panel under Telephone Number, select the telephone number you want to edit, and choose **Edit Telephone** from the Actions menu, or click the **Edit** icon. This opens an Edit Telephone dialog.

Figure 5-18 Edit Telephone Dialog



2. Edit the information for the number (see Step 2 in Editing a Telephone Number) and click **OK**. The edited information is displayed in the Telephone Numbers list.

   If the Primary check box is selected for the telephone number being edited, the Primary check box is disabled in the Edit Telephone dialog. If the Primary check box is not selected for the telephone number being edited, the Primary check box is enabled in the Edit Telephone dialog. To set a telephone number as the new Primary telephone number, select the Primary check box when editing.

   The Create and Edit Telephone dialogs display the following information:

   - **Primary** – Indicates whether this is the primary telephone number for the customer.
   - **Telephone Type** – The type of telephone number, for example, Home or Business. Select a type from the drop-down list (required).
   - **User Label** – User label for the telephone number.
   - **Phone Number** – The telephone number, including area code (required).

- **Extension** – The telephone number extension, if applicable.
- **Contact** – The contact rule for the telephone number. Select a contact preference from the drop-down list.

Viewing Customer Details and Contact Information

If you have read-only access, you will see the **View** icon in the Customer Information panel instead of the **Edit** icon.

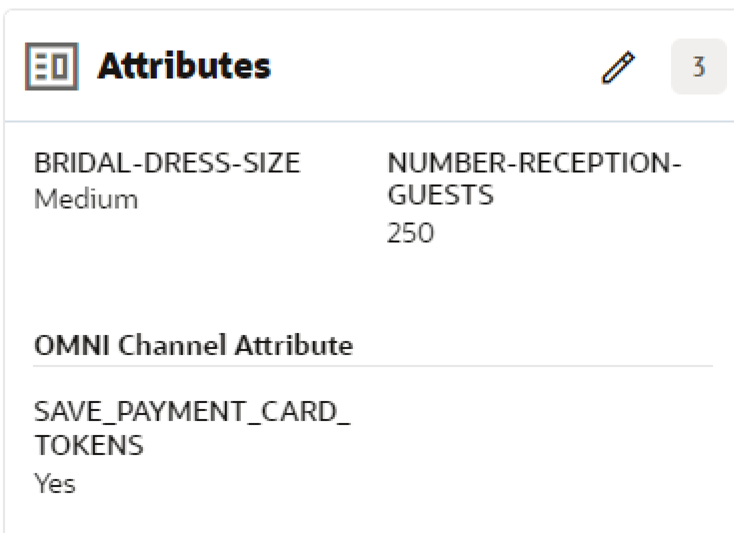
- To view both customer details and contact information, click the View icon at the top of the Customer Information panel.
- To view just customer contact information, click the View icon at the top of the Contact Information section.
- To view just customer details, click the View icon at the top of the Customer Details section.

  See the previous sections for more information on the fields displayed in View mode.

Attributes

The Attributes panel of the Customer Dashboard displays all the attributes and attribute values associated with the customer:

Figure 5-19 Customer Attributes



- A badge with the total number of attributes assigned to the customer is displayed on the right side of the title bar, as in the figure above.
- An Edit icon is displayed next to the badge as in as in the figure above. This lets you access controls for editing, creating and deleting attributes.
- The Customer Attribute section contains the following information for each customer attribute:
  - Group - The group associated with the attribute.

- Name - The name of the attribute.
- Value - The value set for the attribute.
- Description - Description of the information provided by the attribute.

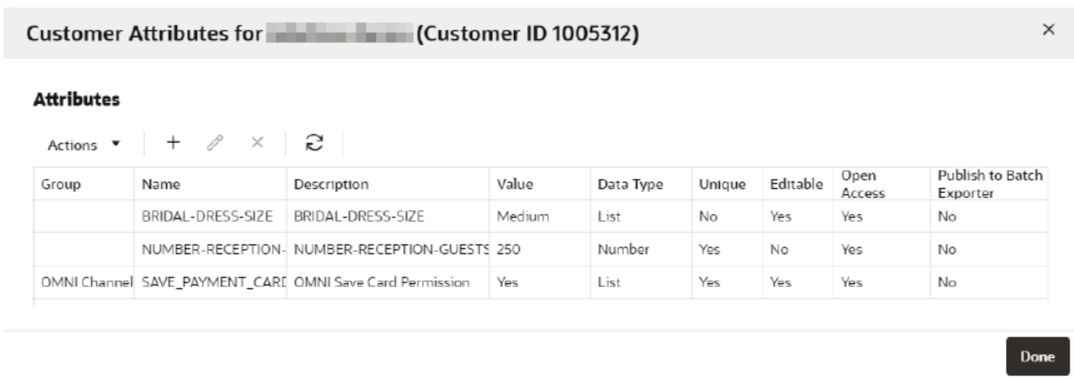
- The name of the attribute appears above the attribute value.
- If attributes are assigned to a group, those attributes are sorted by group, and the group name is displayed above the attributes.
- Scroll bars are available if the number of attributes do not fit in the display area of the panel.
- If there are no attributes assigned to the customer, a pop-up appears indicating `No Attributes assigned`.

Creating an Attribute

1. Click the **Edit** icon at the top of the Attributes panel.

   This displays a window with details of the customer's attributes:

   Figure 5-20 Customer Attributes Details



   The following controls are available in the toolbar:

   - **Actions menu** – The Actions menu has options that correspond to the Add, Edit, and Delete icons.
   - **Add icon** - Displays a dialog that lets you create a new customer attribute
   - **Edit icon** - Displays a dialog that lets you edit a selected customer attribute.
   - **Delete icon** - Deletes a selected customer attribute.

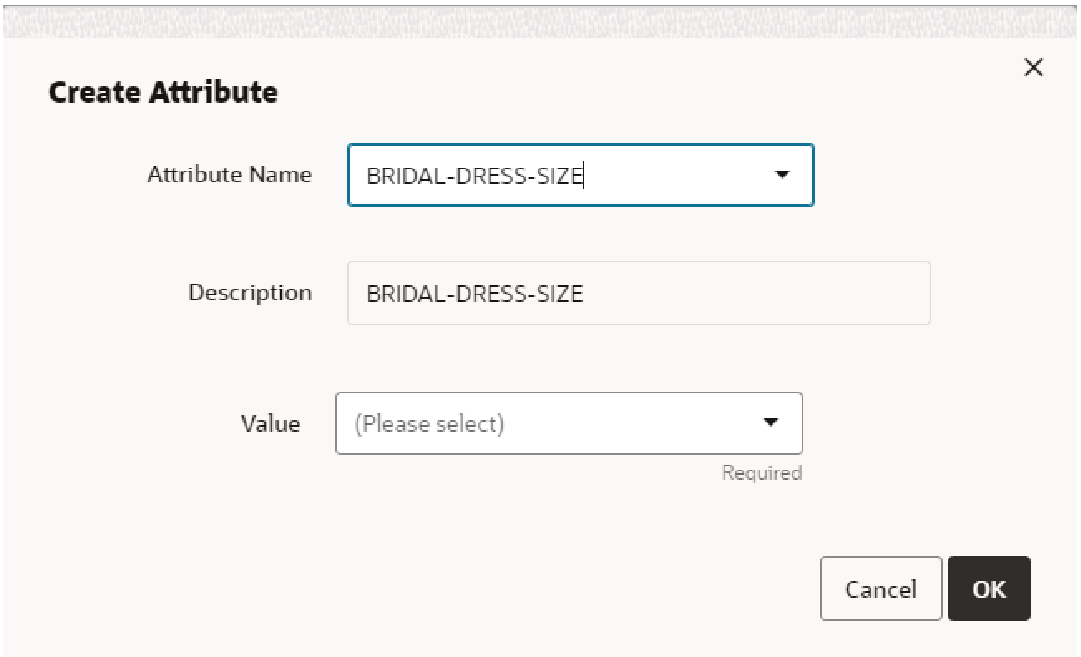
     The following information is displayed for each attribute:

     - Group – The group associated with the attribute.
     - Name – The name of the attribute.
     - Description – Description of the information provided by the attribute.
     - Value – The value set for the attribute.
     - Data Type – The type of data contained in the attribute value.
     - Unique - Only one value can be added to the attribute when it is identified as unique.

- Editable - Identifies whether the associate is allowed to edit the value for the attribute once it is added.
- Open Access – Indicates whether there is open access to this attribute.
- Publish to Batch Folder – Indicates whether the attribute has been made available for export to a marketing system such as Responsys.

2. Click **Add**, or click the **Actions Menu** and select **Add**. This displays the Create Attribute dialog:

Figure 5-21 Create Attributes Dialog



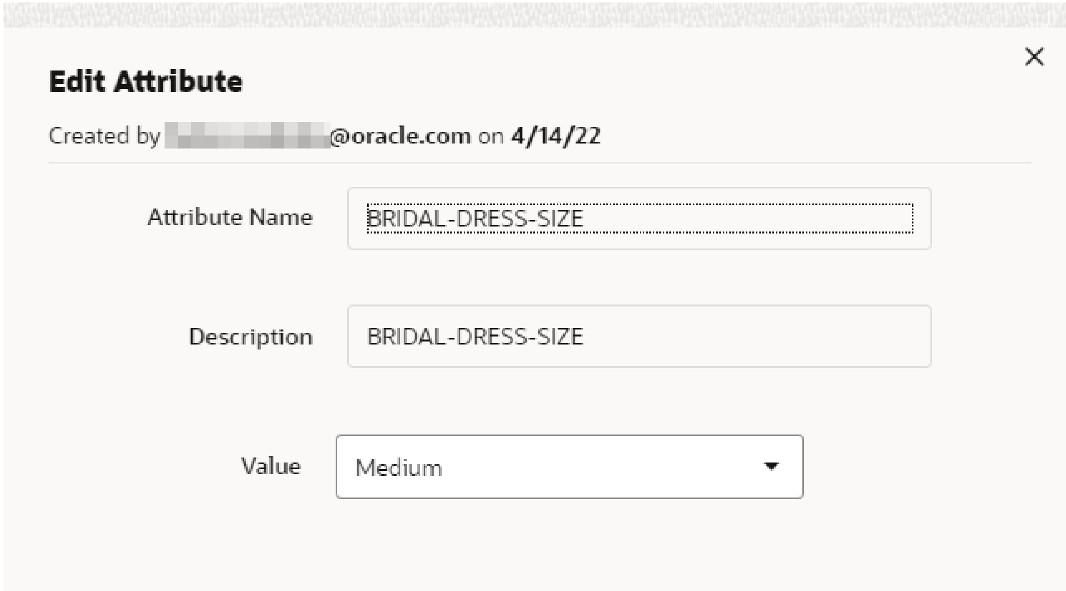
3. Select a **name** from the Attribute Name list.
4. Select a **value** from the Value list.
5. Click **OK**. This adds the new attribute to the list of attributes for the customer

Editing an Attribute

1. Click **Edit** at the top of the Attributes panel.
2. Select the **attribute** that you want to edit.
3. Click **Edit** at the top of the detail window, or choose **Edit** from the **Actions** menu.

   This displays an Edit Attribute dialog with details of that attribute:

Figure 5-22 Edit Attribute Dialog



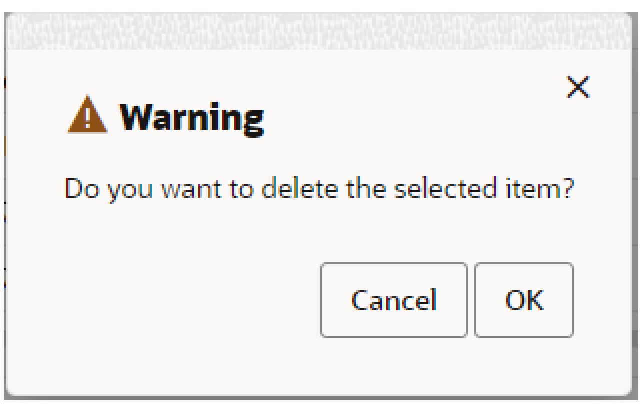
4. Select a new **Value** for the Attribute form the list in the Value field.
5. Click **OK** to accept the value. The attribute is displayed with the new value.

Deleting an Attribute

1. Click **Edit** at the top of the Attributes panel.

   This displays a window with details of the customer's attributes:
2. Select the **attribute** that you want to delete.
3. Click **Delete**, or click the **Actions Menu** and select **Delete**. This displays a Warning message:

Figure 5-23 Warning



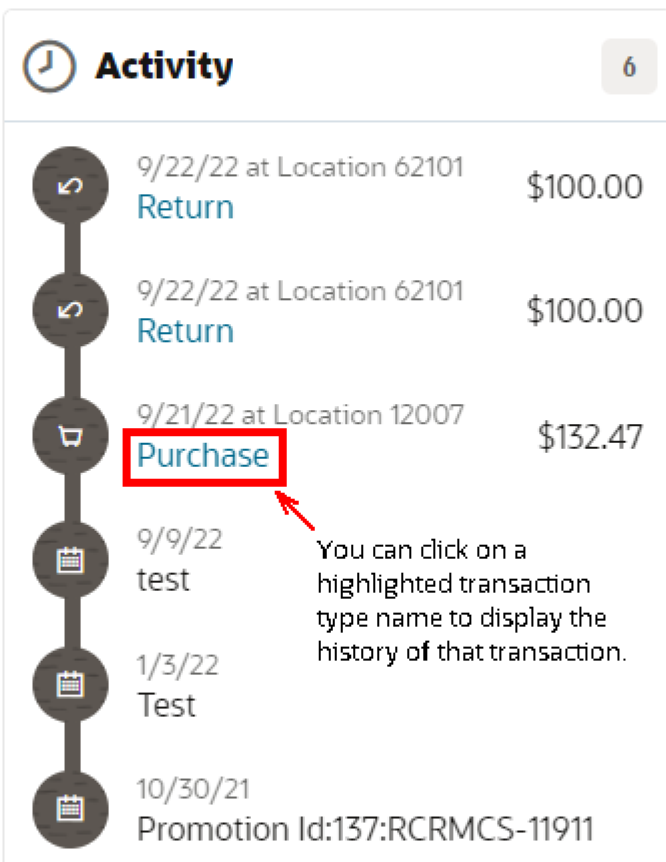
4. Click **OK** to verify that you want to delete the message.
5. When you are finished adding, editing or deleting customer attributes, click **Done**, to return to the Customer Dashboard.

Activity

The Activity panel of the Customer Dashboard provides quick access to transactions and other activities pertaining to a customer.

- This panel displays current and future tasks, and after those, the past 25 activities, which include tasks and retail transactions.
- The user can view the tasks associated with the customer only if they have the appropriate user roles for task access.
- The activity stream is sorted by the most recent first.
- Scroll bars are available if the number of activities do not fit in the display area of the panel.
- If there are no activities to show for the customer, an image with No Activity available to display displays.

Figure 5-24 Customer Activity



The Activity panel can display the following information, depending on the type of activity:

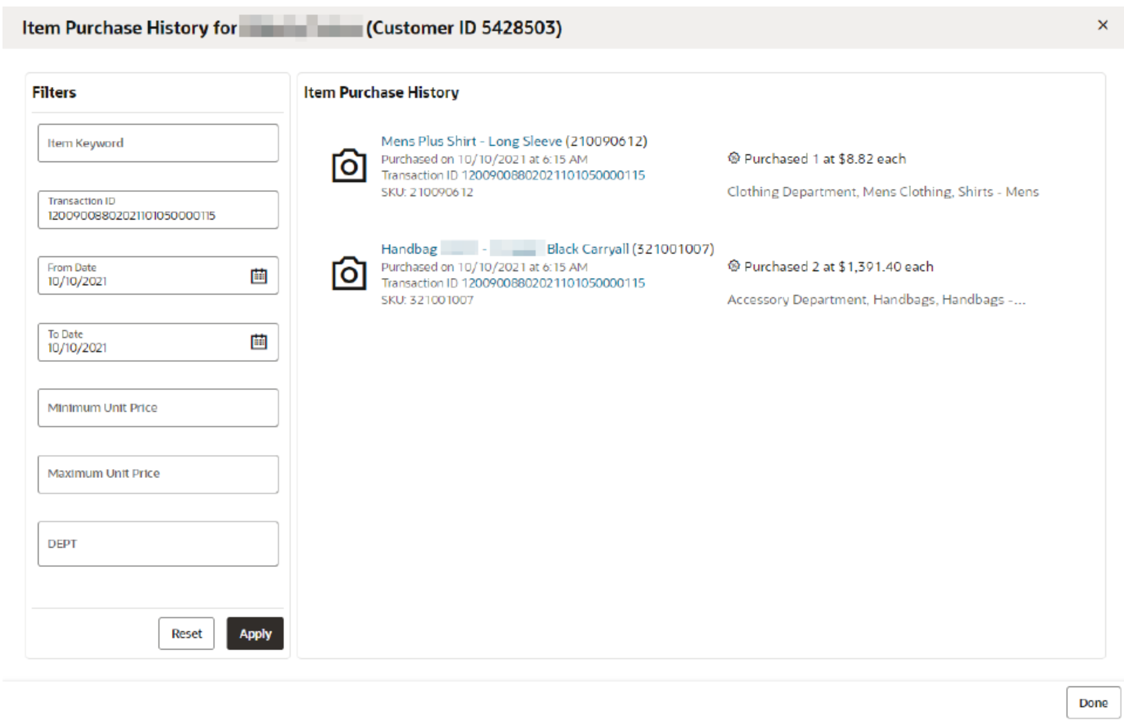
- The date of the activity.
- The name of the activity.

- The location where the activity occurred, if available.
- The total amount of a transaction, such as a purchase.

Item Purchase History

In the Activity panel as shown in Figure 5-24, if the activity is a transaction such as a purchase, return, or void, you can link to the item purchase history details by clicking the highlighted transaction type name.

Figure 5-25 Item Purchase History Details



> **Note:**
>
> You can also link to the Item Purchase History from the Purchase Profile by clicking a colored area in the bar chart, or by clicking the View All Purchases link. See **Purchase Profile**.

Filters

You can use the fields in the Filters panel to search for specific items by the following criteria:

- **Item Keyword** – Enter a keyword in the item description to filter for items having that keyword.
- **Transaction ID** – Enter an exact Transaction ID to filter for that transaction.
- **Date Range** – Specify a date range using the calendars to search for items in that date range.

- **Unit Price** – Use the up and down arrows to specify a minimum and maximum unit price to filter for items in that price range.
- **Department** – The store department where the item was purchased. Select a department from the list to filter on items from that department.

> **Note:**
>
> This is a client-specific hierarchy field and the name (for example, Department) will depend on the client system configuration.

- **Reset** – Click **Reset** to clear all filters. This displays all of the items purchased by the customer.

  Apply – Click **Apply** to display items filtered by the specified criteria.
- When there are more fields than can fit in the filter box, a scroll bar is provided to navigate to the hidden items.

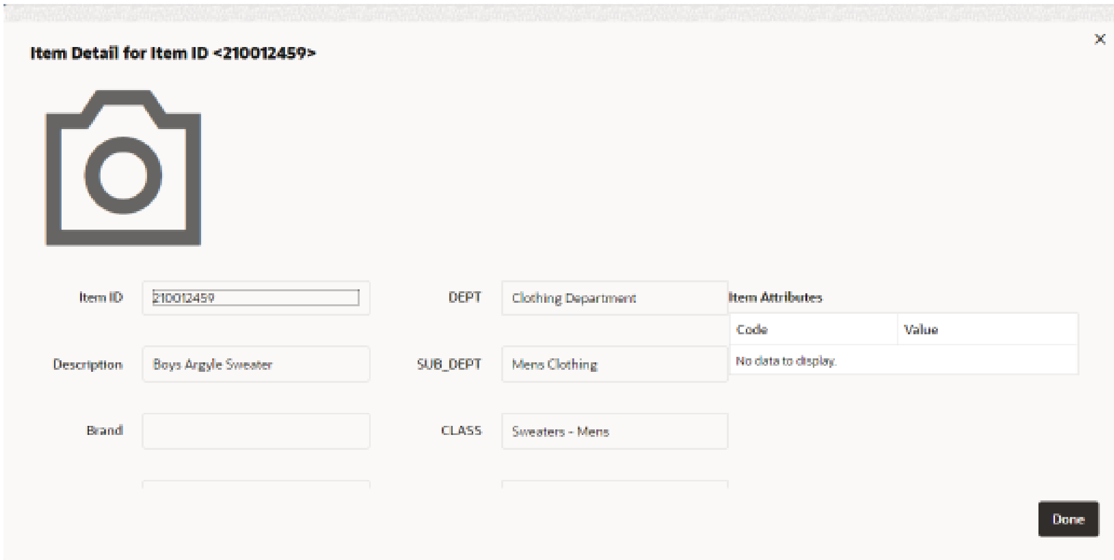
The following information is displayed for each item in the list, if available:

- Item name and number
- Purchase date and time
- Transaction ID
- SKU
- Quantity – the number of items purchased or returned
- Price – the price paid for the item
- Points –the loyalty points earned or reduced for the item purchased or returned
- Item Hierarchies for the item

Item Details

When you click a specific item in the Item Purchase History panel, the Item Detail opens:

Figure 5-26 Item Detail



These details for the item are displayed, if available:

- Item ID
- Description
- Brand
- Season
- Color
- Hierarchy 1-5 - These vary according to the way the customer is configured, for example, Department, SUB_DEPT, CLASS, SUB_CLASS, STYLE_ID. Only configured levels are displayed.
- Item Attributes:
  - Code
  - Value
  - If more attributes are available than can fit in the Item Attributes box, scroll bars are provided for navigation to hidden information.

Click **Done** to close the Item Detail.

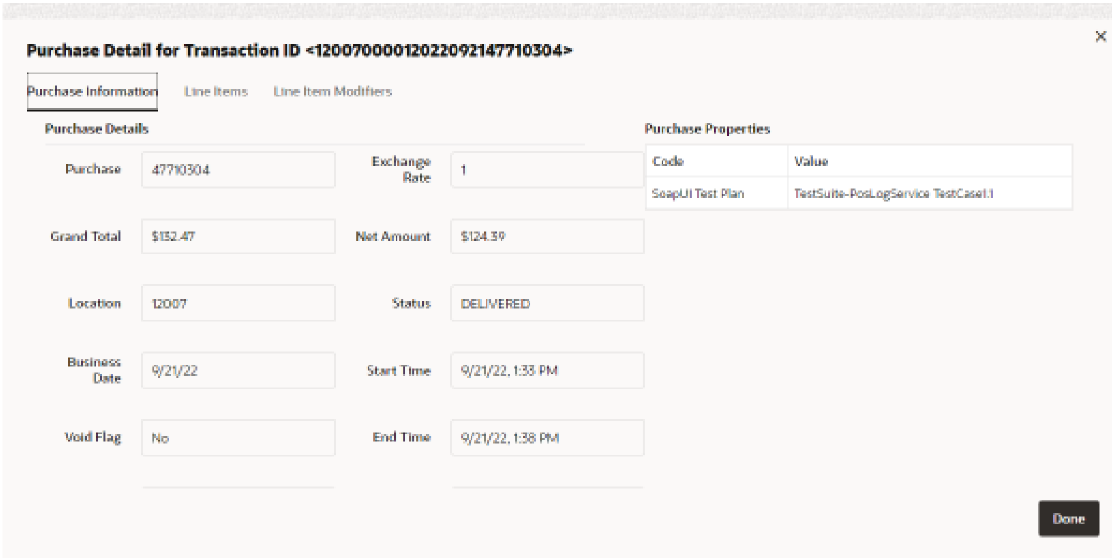
Transaction Details

When clicking a specific transaction ID in the Item Purchase History panel, a Purchase Details window displays for that transaction ID.

- The popup has three tabs.
- The information is read-only.
- It displays both purchases and returns, in all three tabs, based on the selected transaction.
- All currency fields are populated based on the system base currency.

- If there is more information than can fit in the tab, scroll bars are provided for navigation to hidden information.

Figure 5-27   Purchase Detail - Purchase Information

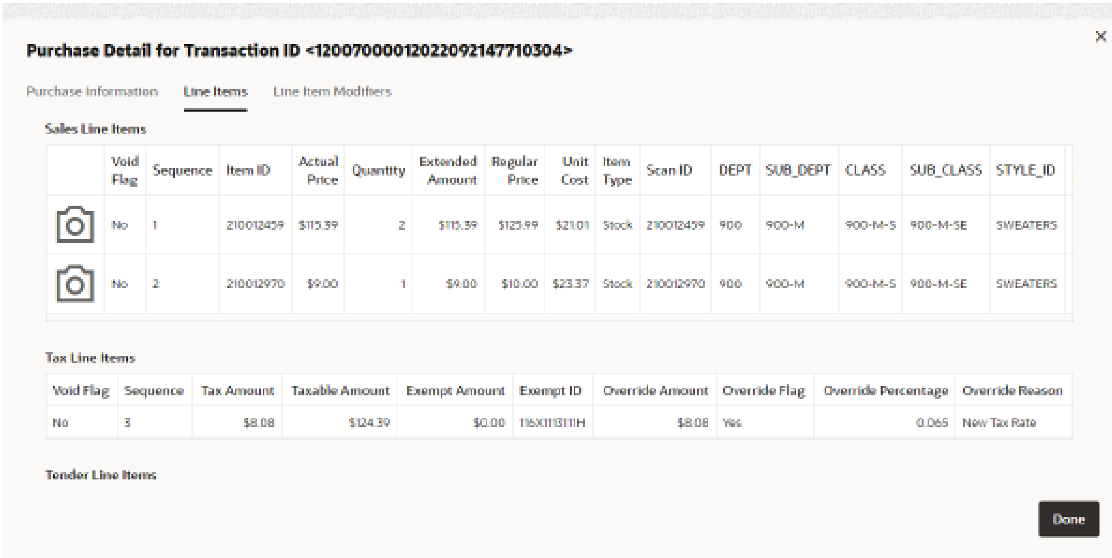


The first panel, Purchase Information, is displayed by default when you click the transaction ID, or when you click the Purchase Information tab. It displays the following details about the transaction, if available:

- Purchase
- Grand Total
- Location
- Business Date
- Void Flag
- Register
- Cashier
- Currency
- Original Currency
- Exchange Rate
- Net Amount
- Status
- Start Time
- End Time
- Tax Amount
- Points Earned
- Linked Purchase
- Code

- Value

Figure 5-28 Purchase Details - Line Items



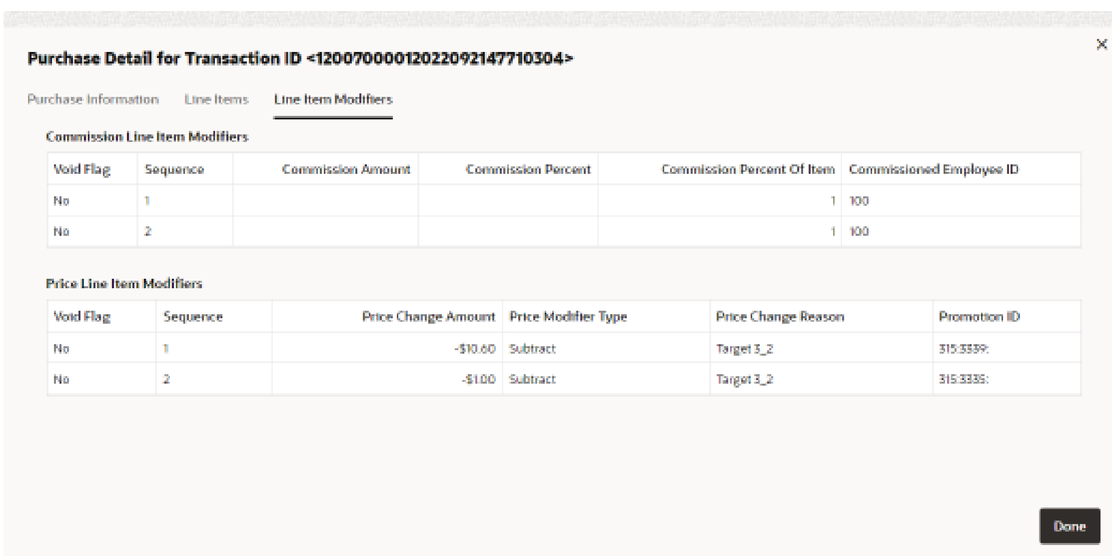
Line items are displayed when you click the Line Items tab. The following information is displayed, if available:

- Sales Line Items
  - Void Flag
  - Sequence
  - Item ID
  - Actual Price
  - Quantity
  - Extended Amount
  - Regular Price
  - Unit Cost
  - Item Type
  - Scan ID
  - Department
  - Hierarchy 1-5 - These vary according to the way the customer is configured, for example, Department, SUB_DEPT, CLASS, SUB_CLASS, STYLE_ID. Only configured levels are displayed.
  - Points Earned
- Tax Line Items
  - Void Flag
  - Sequence
  - Tax Amount

- Taxable Amount
- Exempt Amount
- Exempt ID
- Override Amount
- Override Flag
- Override Percentage
- Override Reason

- Tender Line Items
  - Void Flag
  - Sequence
  - Tender ID
  - Tender Amount
  - Authorization Code
  - Account Number
  - Activity
  - Adjudication Code
  - Expiration Date
  - Face Value
  - Issue Date
  - Issue Type
  - Serial Number
  - Remaining Amount

Figure 5-29 Purchase Detail - Line Item Modifiers



When clicking the Line Item Modifiers tab, the line item modifiers are displayed. The following information is displayed, if available:

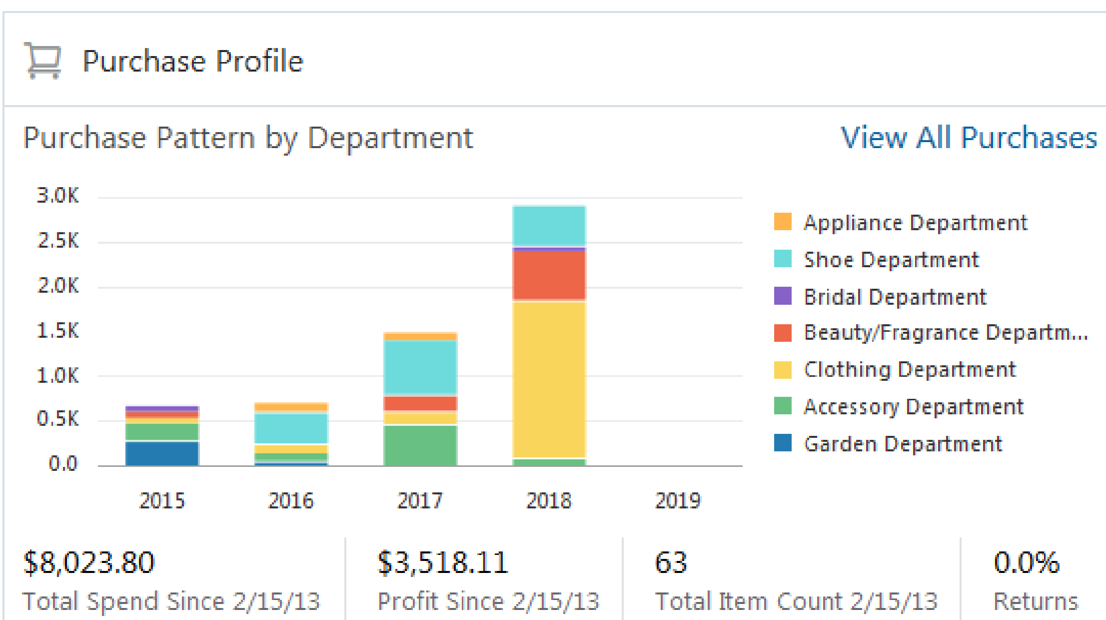
- Commission Line Item Modifiers:
  - Void Flag
  - Sequence
  - Commission Amount
  - Commission Percent
  - Commission Percent of Item
  - Commissioned Employee ID
- Price Line Item Modifiers:
  - Void Flag
  - Sequence
  - Price Change Amount
  - Price Modifier Type
  - Price Change Reason
  - Promotion ID

Click **Done** when you are finished viewing the transaction details.

Purchase Profile

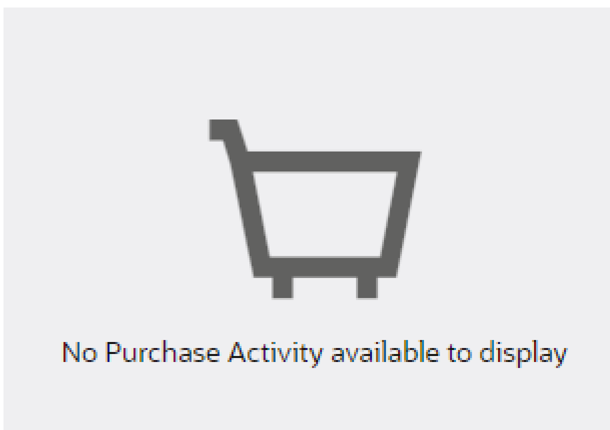
The Purchase Profile panel shows the purchase pattern of the customer. Each bar in the graph represents a year. The colored bands correspond to the revenue department* (*or other entity named by the client) in which the customer purchased products during that year, measured by the amount of spending. Each year in the graph displays the top five revenue departments (or other entities named by the client).

Figure 5-30 Customer Purchase Profile



- Other revenue metrics include:
  - **Total Spend** - Shows how much the customer has spent since their first purchase to date.
  - **Profit Since** - Shows the total profit the store or chain has made since the customer's first purchase to date.
  - **Total Item Count** - Shows the total transaction (purchases minus returns) count for the lifetime of the customer. This includes all transactions, not just the ones represented in the five departments and five years displayed in the graph.
  - **Returns** - Shows the percentage of the amount of Returns to the amount of Total Spending.
- If there are no Purchase Profiles to show for the customer, an image with `No Purchase Activity available to display` appears:

Figure 5-31 No Purchase Activity Available Message



Viewing Purchase Pattern Details

Hover over a colored area in a graph to see detail information in a tool tip. This information includes:

- **Category** – The category of the purchase, such as Clothing Department.
- **Category Spend** – How much the customer spent on items in this category.
- **Classes** – The name of the classes (or client-specific hierarchy level) within the selected category.

Viewing Purchase History

Click a colored area in a bar chart to go the Item Purchase History for all the items represented in that area.

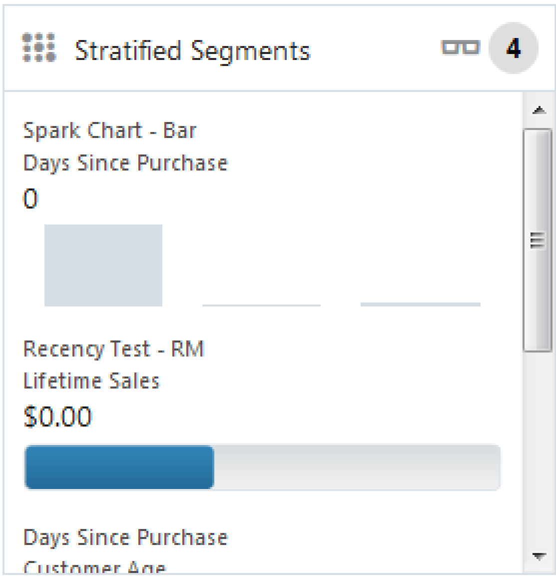
You can also click the **View All Purchases** link to go to the Item Purchase History for all items.

See **Item Purchase History** for more information.

Stratified Segments

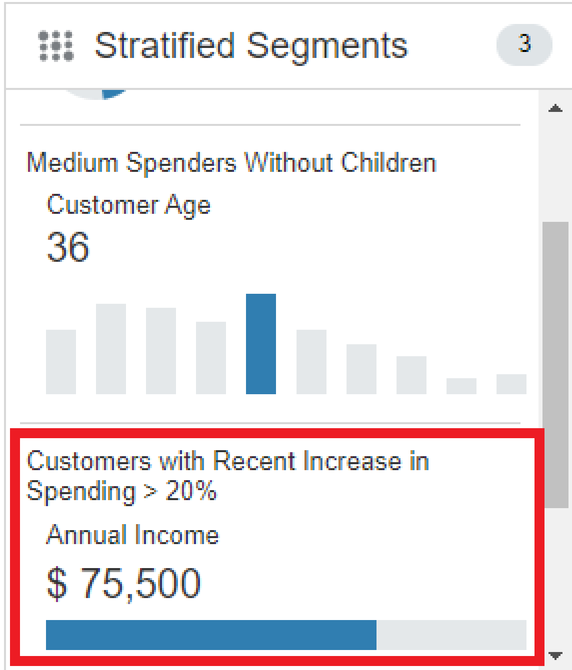
Stratified Segments define groups of Customers. The Customers within a Stratified Segment are divided into levels within the Segment. The stratified segments to which the customer belongs are shown in the Stratified Segments panel of the Customer Dashboard.

Figure 5-32 Stratified Segments Panel



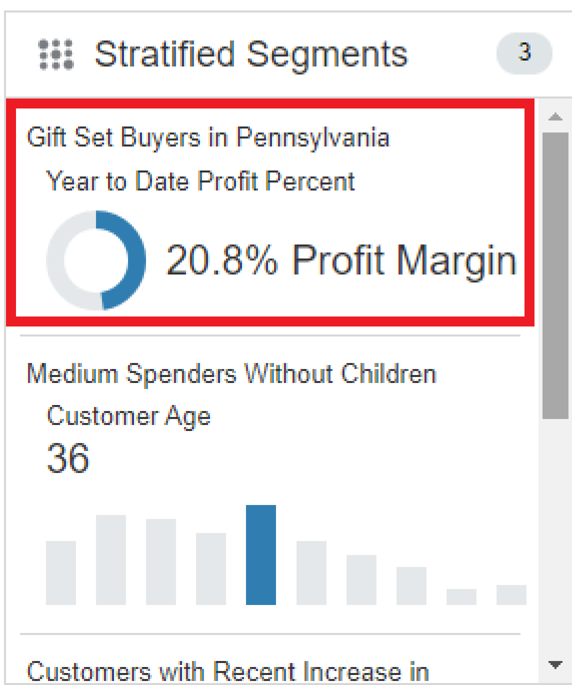
- Stratified segments classified as public are shown. If a stratified segment is classified as private, it will only be shown to the associate who created the stratified segment.
- Three types of graphs are used to represent statistics:
  - Status Meter Gauge – Horizontal, uses horizontal orientation to indicate thresholds at specific values:

Figure 5-33 Stratified Segments - Horizontal



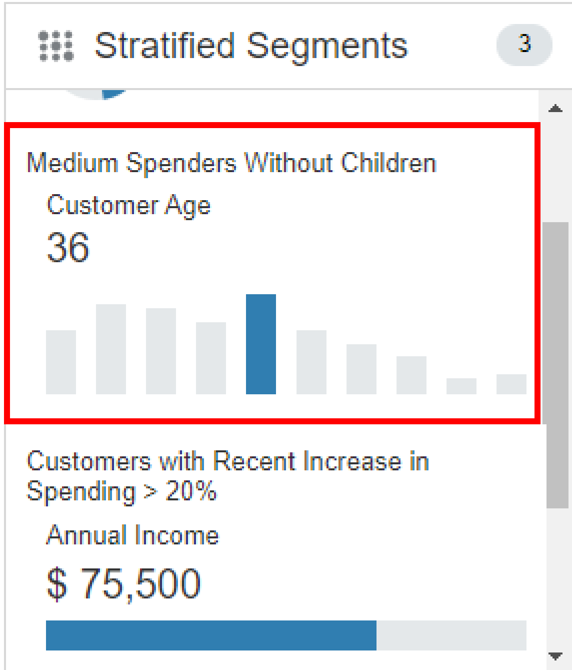
– - Status Meter Gauge - Circular, uses circular orientation to indicate thresholds at specific values:

Figure 5-34 Stratified Segments - Circular



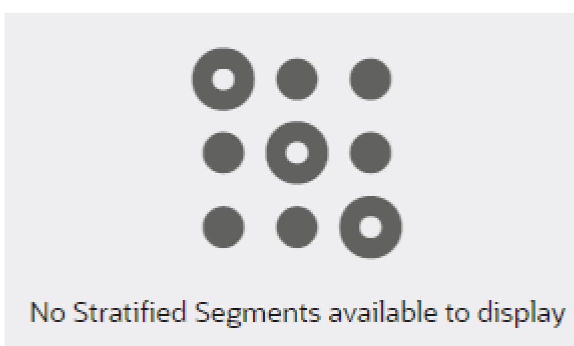
– - Spark Chart - Bar, used to view trends over time and generally paired with additional context in a table:

Figure 5-35 Stratified Segments - Spark Chart (Bar)



- A badge with the total number of stratified segments to which the customer belongs displays on the right side of the title bar.
- An eyeglass icon lets you view details about all the Stratified Segments to which the customer belongs. See **Viewing Customer Stratified Segments List**.
- Scroll bars are available if the number of stratified segments do not fit in the display area of the panel.
- If there are no stratified segments assigned to the customer, the following image is displayed:

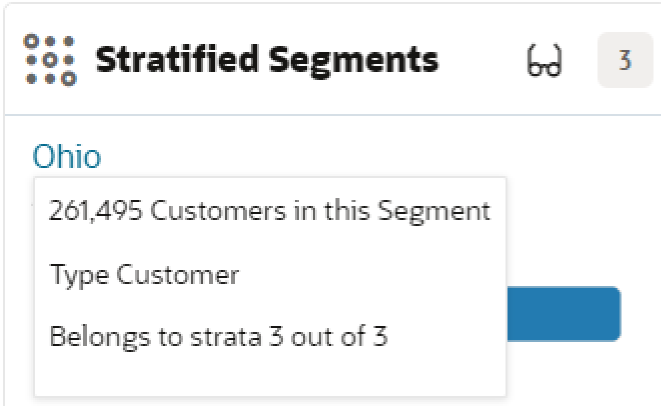
Figure 5-36 No Stratified Segments Assigned Message



Viewing Stratified Segment Details

If you hover over a segment name in the Stratified Segments panel a tool tip is displayed:

Figure 5-37 Stratified Segments Tool Tip



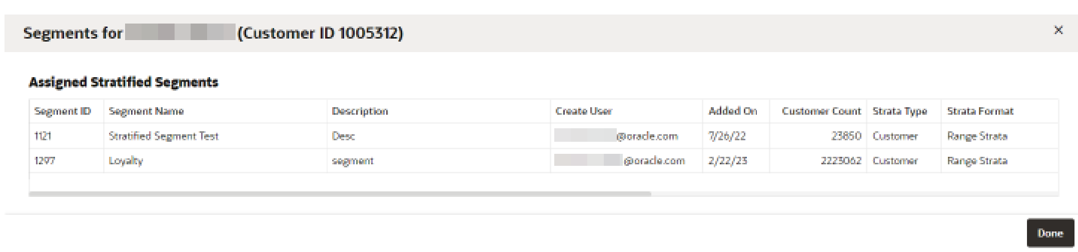
The following information is provided:

- Segment Description.
- Customer Count – Total number of customers in this segment.
- Strata Type and Based on Value:
  - Strata Type values (Customer, Loyalty, Transaction).
  - Based on Value (Header, Detail, Customer, Loyalty Summary, Loyalty Detail).
  - Type = <strata type> based on <based on value>.
- Customer Strata membership - The strata the customer falls into.

Viewing Customer Stratified Segments List

1. Click the **eyeglass** icon in the title bar. This displays the Stratified Segments for (Customer) window:

   Figure 5-38 Stratified Segments for Customer

   This window displays the following view-only information about the stratified segments associated with the customer:

   - The Customer Name and ID Number are displayed in the Segments for title bar. If there are no segments assigned, the table displays No Segments Assigned.
   - Assigned Stratified Segments Grid

- Segment ID – ID of the segment
- Segment Name – Name of the segment
- Description – Description of the segment
- Create User – the user who created the segment
- Added On – the date on which the customer was added to the segment.
- Customer Count – the number of customers in that segment.
- Strata Type – (Customer, Loyalty, Transaction)
- Strata Format – the format used to create the strata. Possible values are:

  - Range Strata – Strata are determined by configured ranges

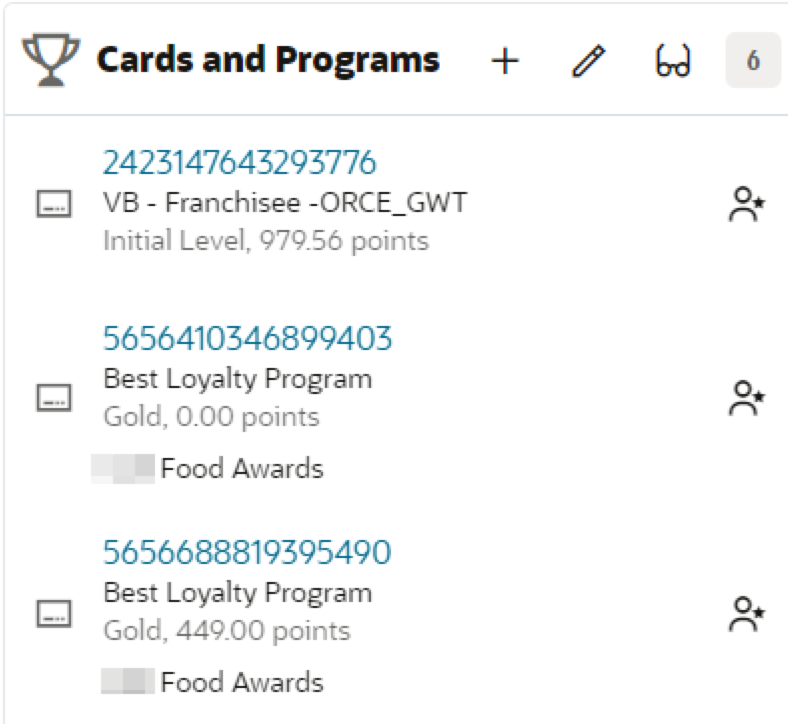
  - Ntile Strata – Strata are formed by equally sized groups of customers
- Based on Value – the basis used for determining the Strata field (Header, Detail, Customer, Loyalty Summary, Loyalty Detail)
- Strata Field – the field used to create the Strata
- Average Strata Value
- Number of Strata – the number of strata in the segment
- Customer Strata – the strata the customer falls into
- Customer Value

2. Click **Done**. This returns you to the Customer Dashboard.

Cards and Programs

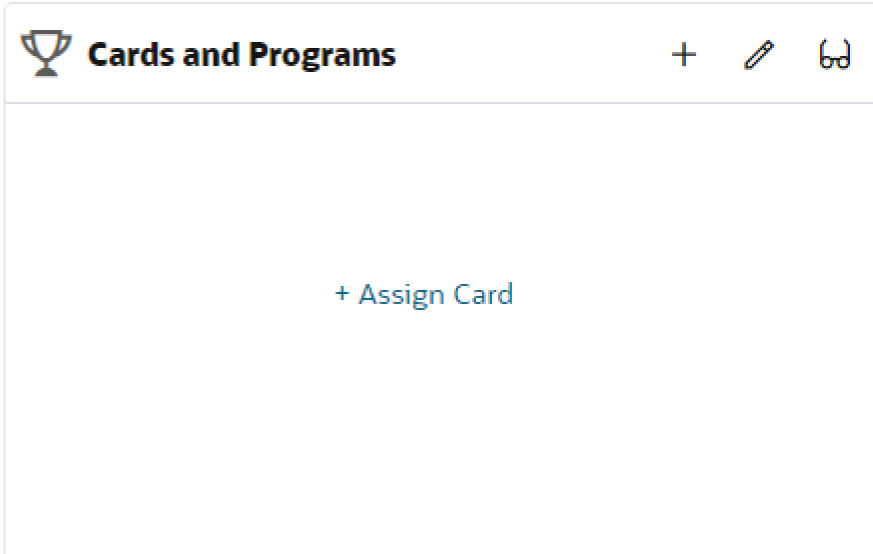
The Cards and Programs panel of the Customer Dashboard includes information about cards held by the customer and about the programs associated with each card. Programs include Tender, Award, and Loyalty. You can assign and generate cards for the customer in this panel.

Figure 5-39 Cards and Programs



- The title bar icons let you perform the following actions:
  - Click the **Add** icon to assign a card or generate an electronic card
  - Click the **Pencil** icon to display the Cards and Programs window for the customer
- Only active programs and cards are displayed.
- If there are multiple cards associated with the customer, the programs are grouped together by card, and the card number is displayed next to the programs.
- A badge with the total number of programs for which the customer has an account displays on the right side of the title bar.
- Scroll bars are available if the number of programs do not fit in the display area of the panel.
- If there are no programs assigned to the customer, the + Assign Card link displays:

Figure 5-40 No Programs Assigned: + Assign Card Link

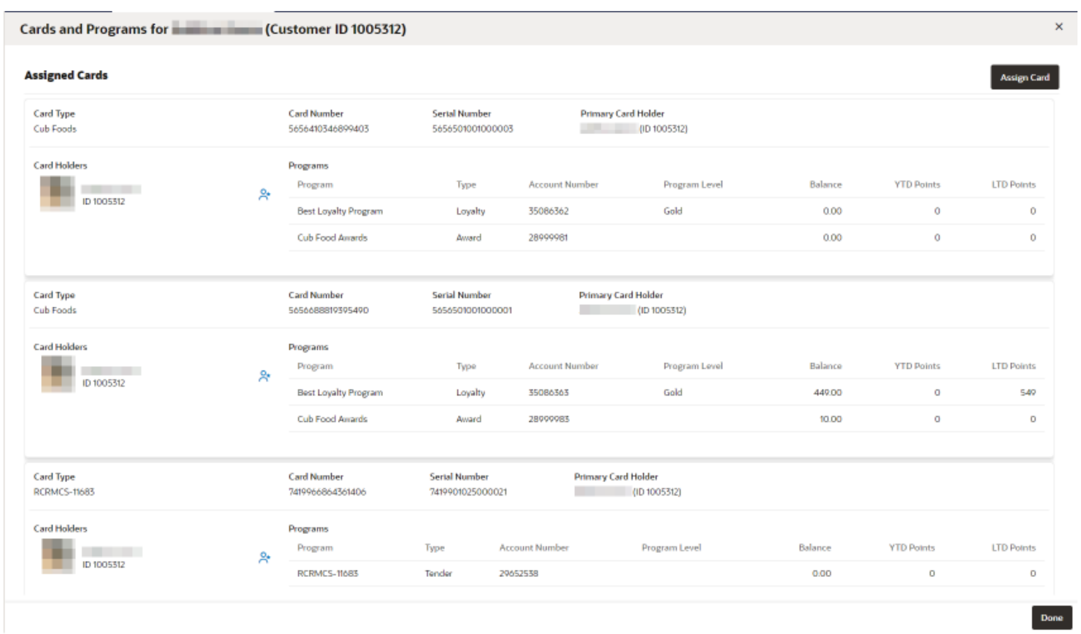


Viewing Card Assignments

To view details about the cards and programs assigned to the customer:

1. Click the **Edit** icon in the Cards and Programs title bar. This displays the Cards and Programs for (Customer) window:

Figure 5-41 Assigned Cards



- The Customer Name and ID number are displayed in the title bar.
- Assign Card allows access to the Assign Card to (Customer) dialog. See: **Assigning a Card**.

- The following fields are displayed for a card:
  - Card Type
  - Card Number
  - Serial Number
  - Primary Card Holder (Customer Name and ID)
- Card Holders
  - Customer Image, if available, or customer initials
  - Customer Name
  - Primary Card Holder Customer Name and ID
  - Primary Card Holder icon – displayed to the right of the card holder name and ID.
  - Secondary Card Holders Image, Name and ID – There can be multiple secondary card holders
- The following fields are displayed for each program:
  - Program Name
  - Program Type – The type of program: Award, Tender, Loyalty
  - Account Number
  - Program Level – displayed for Loyalty programs only.
  - Balance
  - YTD Points – Year to Date points. This is displayed for Loyalty programs only
  - LTD Points – Lifetime to Date points. This is displayed for Loyalty programs only.
- The list is sorted by card number, where the Customer is a primary cardholder first.

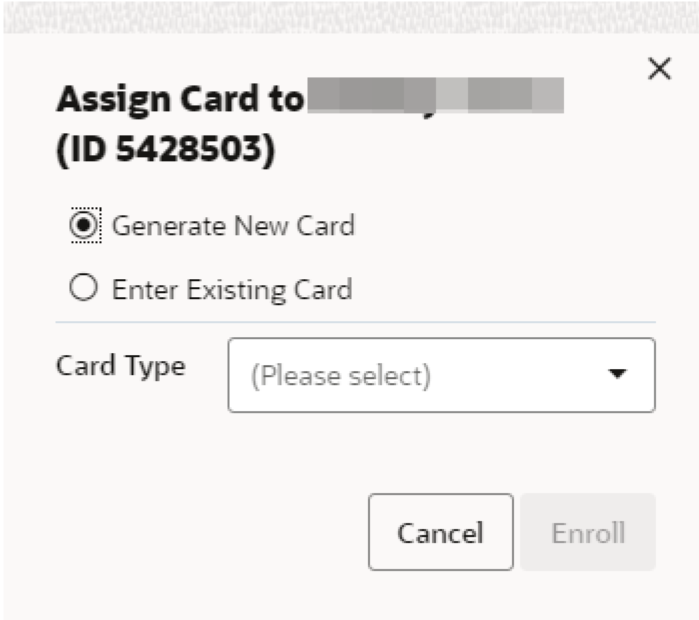
2. Click **Done** to return to the Customer Dashboard.

Assigning a Card

To assign a card:

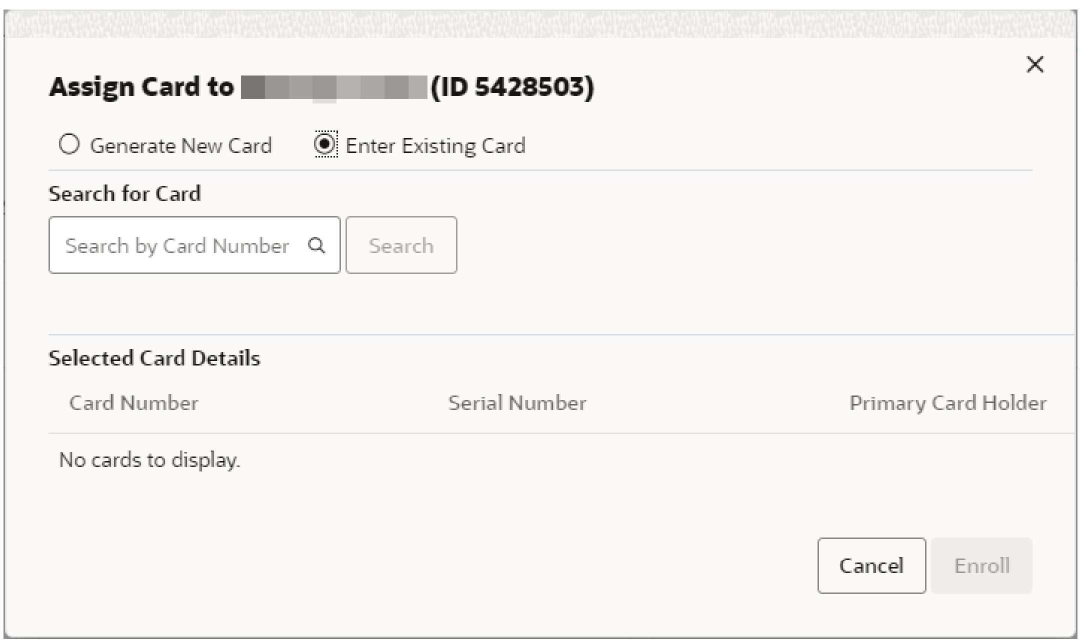
1. Click **Assign** in the Cards and Programs panel header or click **+ Assign Card** in the Cards and Programs for (Customer) detail window. Either action displays the Assign Card to (Customer) dialog:

Figure 5-42 Assign Card to (Customer)



2. Select the **Enter Existing Card** option. This populates the dialog with Search for Card field:

Figure 5-43 Search for Card



3. In the Search for Card field, enter the full **Card Number** or **Serial Number** of the card you want to assign. Do not use spaces.
4. Click **Search**. This populates Selected Card Details with the Card Number, Serial Number, and Primary Card Holder of the card, if one exists.
5. Click **Enroll** to assign the card to the customer. This returns you to the previous window with the new card displayed for the customer.

Generating a Card

To generate a card:

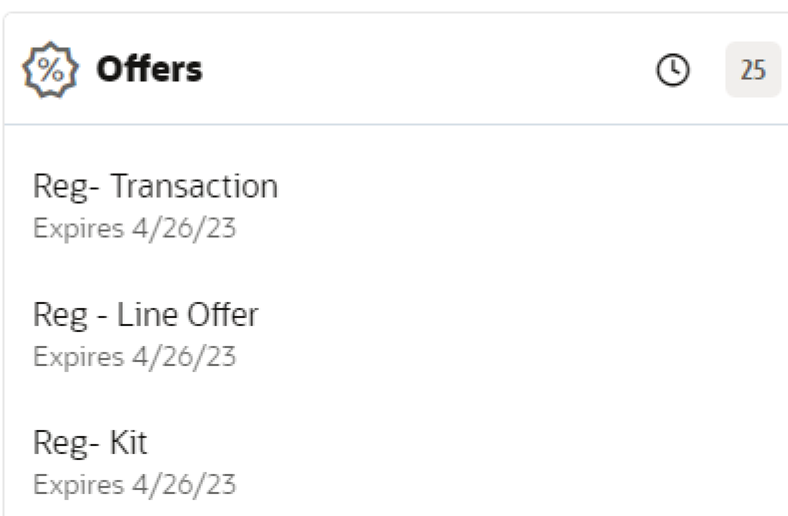
1. Click **Assign** in the Cards and Programs panel header or click **Assign Card** in the Cards and Programs for (Customer) detail window. Either action displays the Assign Card to (Customer) dialog (see Figure 5-42).
2. By default, Generate New Card is selected. Keep this selection.
3. Select a **Card Type** from the list.
4. Click **Enroll** to generate a new electronic card for the customer. This returns you to the previous window with the new card displayed for the customer.

> **Note:**
>
> : If you select a valid card series where all cards have been assigned or generated already, clicking Enroll displays a message: *No cards found for selected card type.*

Offers

An offer is part of a campaign that is intended to provide some purchase incentive to customers. These offers may provide price incentives on a specific item, or provide coupons to be redeemed during a purchase, they may be messages notifying customers of special events or pricing, or they may provide tender certificates that a customer can use at a later date The Offers panel of the Customer Dashboard shows current offers for the customer.

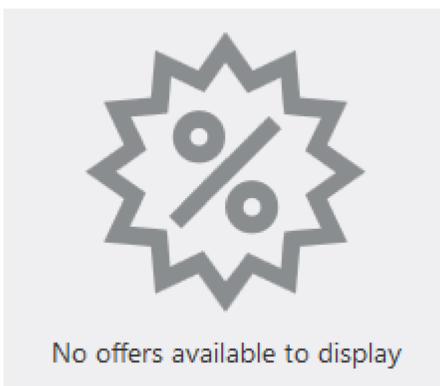
Figure 5-44 Offers



- A badge with the total number of offers the customer is qualified for displays on the right side of the title bar.
- The following information is displayed for each offer:

  - Offer Name
  - Expiration date – the expiration date comes from the promotion of which the offer is a part, or from the coupon expiration date, if the offer has coupons.
- The following offers are displayed:
  - Any offer within an ACTIVE, NOT EXPIRED promotion that is exclusively targeted to a segment the customer is a part of.
  - Any offer within an ACTIVE, NOT EXPIRED promotion that is NOT exclusively targeted.
  - Any offer within an ACTIVE, NOT EXPIRED promotion that is NOT targeted.
  - Any entitlement offer within an ACTIVE, NOT EXPIRED Award promotion, with an Award Program. Requires a card associated to the program for the customer.
- A maximum of 25 offers are displayed.
- The offers are sorted by expiration date in ascending order.
- Scroll bars are available if the number of offers do not fit in the display area of the panel.
- Exclusive offers are indicated with an icon next to the exclusive offer. When you hover over the icon, the text Exclusive Offer displays. Entitlements are exclusive offers. Promotional offers can be exclusive or general.
- If there are no offers assigned to the customer, the system displays the following image:

Figure 5-45   No Offers Available Message

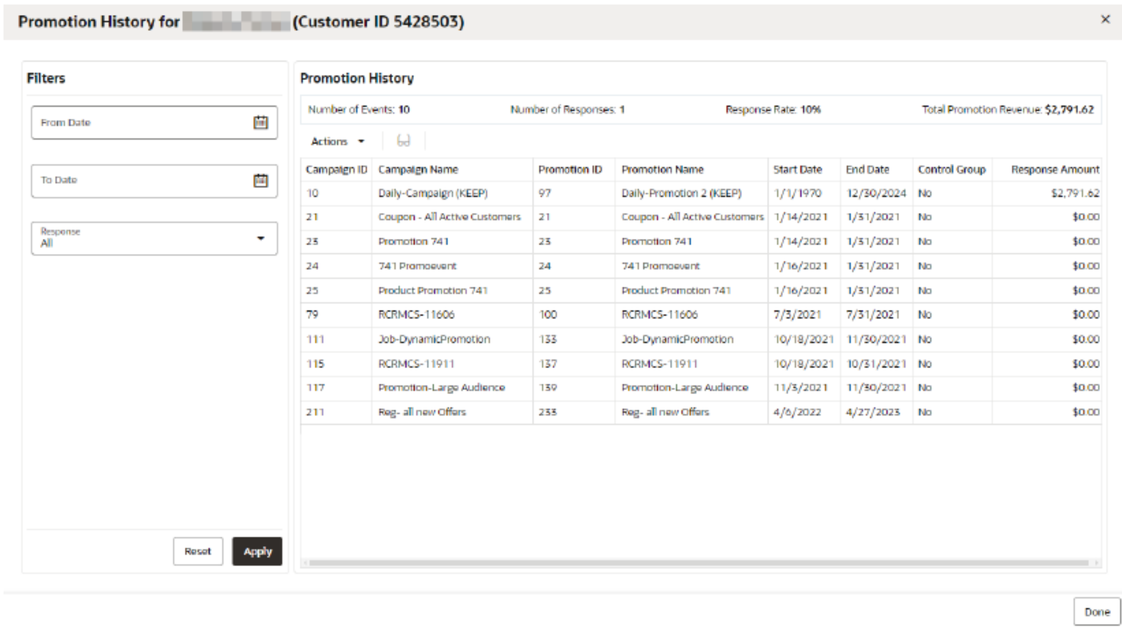


- There is a View Promotion History link at the bottom of the Offers panel that provides access to the Promotion History window. See the following section, Promotion History for details.

Promotion History

When you click the **View Promotion History** link in the Offers panel or choose the **Promotion History** option from the **Actions** menu on the Customer's Dashboard, the Promotion History window is displayed.

Figure 5-46 Promotion History



The Promotion History window displays metric summary information and detail information about specific promotion events for the selected customer. You can filter the list of events by date range and response type.

Filters Panel

You can filter the list of promotion events using these controls:

- Date Range – Select a date range in the From and To calendar fields to filter on promotion events in only that date range
- Response – Select a promotion response from the list to filter on one of the following response types:
  - All
  - None
  - Generated Revenue

Click **Apply** to apply the filter, or **Reset** to clear the filter.

Promotion History Panel

The Promotion History panel lists the filtered promotion events and summarized metrics for the set of events. The following information is provided:

- Metrics:
  - Number of Events – The number of promotion events that have been available to the customer within the date range of the search.
  - Number of Responses – The number of promotions to which the customer has responded within the date range of the search.

  - Response Rate – The percentage of available promotions to which the customer has responded within the date range of the search.
  - Total Promotion Revenue – The total revenue received from customer responses to promotions within the date range of the search.
- The following information is displayed in the Promotion History table for each event:
  - Campaign ID
  - Campaign Name
  - Promotion ID
  - Promotion Name
  - Start Date
  - End Date
  - Control Group
  - Response Amount
- The Promotion History list is sorted by Response Amount in descending order (highest value first).
- If there are no promotions for the customer, the message No Promotions Available to Display displays.

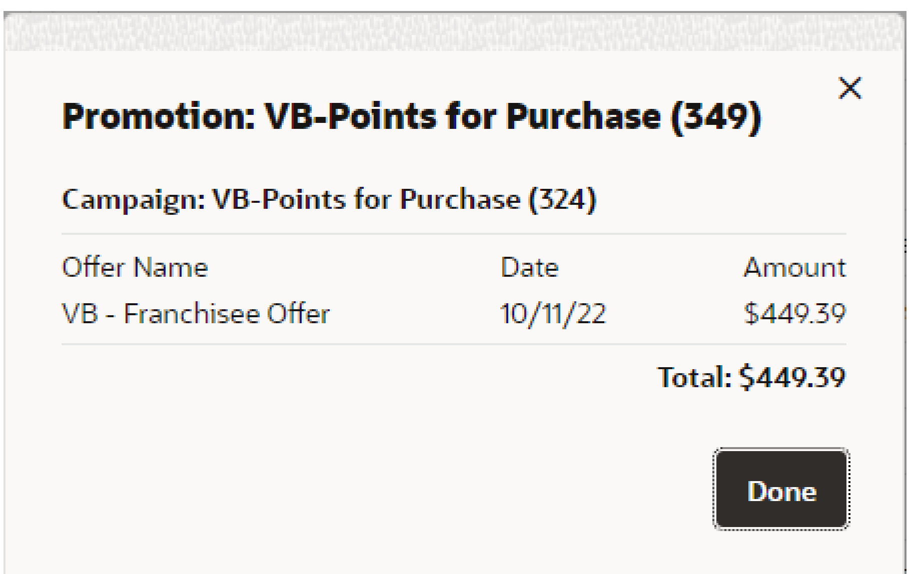
Viewing Promotion Event Detail

You can see more detail about an event in a view-only window following these steps:

1. Select the event in the grid that you want to view.
2. From the Actions menu, choose View, or click the View icon.

   This displays the event in a view-only window:

   Figure 5-47 Promotion Event Detail

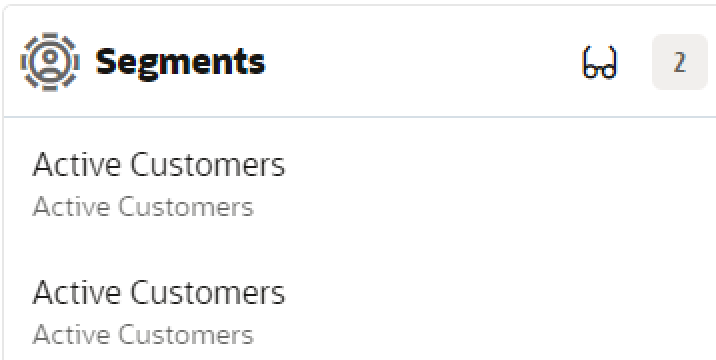
3. Click **Done**. This returns you to the Promotion History window.

4. To return to the Customer Dashboard, click **Done**.

Segments

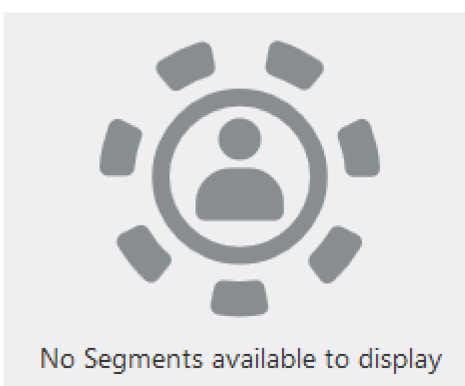
The Segments panel displays the unstratified segments to which the customer belongs.

Figure 5-48 Customer Segments



- An eyeglass icon lets you view details about all the Segments to which the customer belongs. See Viewing Customer Segments
- A badge with the total number of segments to which the customer belongs displays on the right side of the title bar.
- The following information is displayed for each segment:
  - Segment Name
  - Segment Description
- If a segment is designated as private, it is only displayed for the user who created it.
- Scroll bars are available if the number of segments do not fit in the display area of the panel.
- If there are no segments assigned to the customer, the following image is displayed:

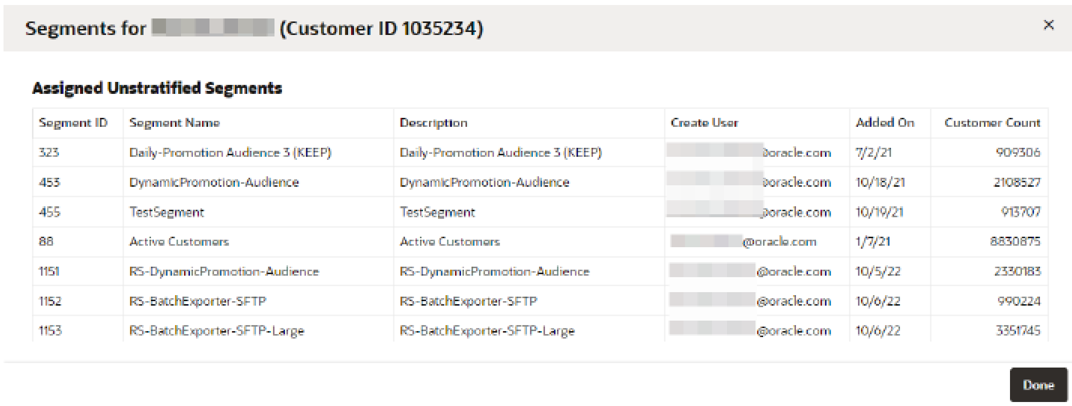
Figure 5-49 No Segments Available Image



Viewing Customer Segments

1. Click the **Eyeglass** icon in the title bar. This displays the Segments for (Customer) window:

Figure 5-50 Segments for Customer



This window displays the following view-only information about the segments associated with the customer:

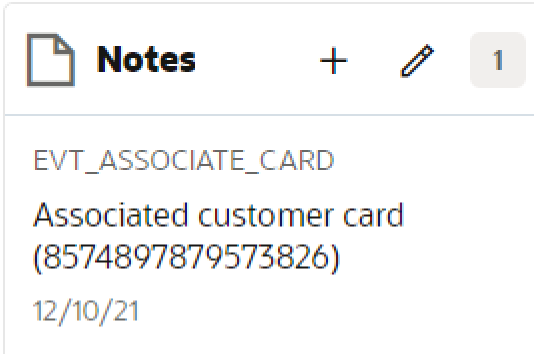
- The Customer Name and ID Number are displayed in the Segments for title bar. If there are no segments assigned, the title displays No Segments Assigned.
- Assigned Unstratified Segments Grid
  - Segment ID – ID of the segment.
  - Segment Name – Name of the segment.
  - Description – Description of the segment
  - Create User – the user who created the segment.
  - Added On – the date on which the customer was added to the segment.
  - Customer Count – The number of customers in that segment.

2. Click **Done**, to return to the Customer Dashboard.

Notes

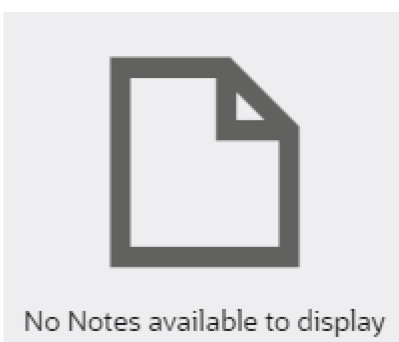
The Notes panel of the Customer Dashboard provides information about the last 25 Notes written about the Customer.

Figure 5-51 Notes



- A badge with the total number of notes for the customer displays on the right side of the title bar.
- The following information is displayed for each note:
  - The note type.
  - The first three lines of the note.
  - The date the note was created.
  - The user name of the person who create the note.
- If a note is marked as private, the details of the note are masked to all associates except for the note creator or an associate with the System Administrator role.
- A maximum of 25 notes are displayed.
- The notes are sorted by update date in descending order.
- Scroll bars are available if the number of notes do not fit in the display area of the panel.
- Notes created within a task do not appear on the list.
- If there are no notes created for the customer, the following image is displayed:

  Figure 5-52 No Notes Available Message

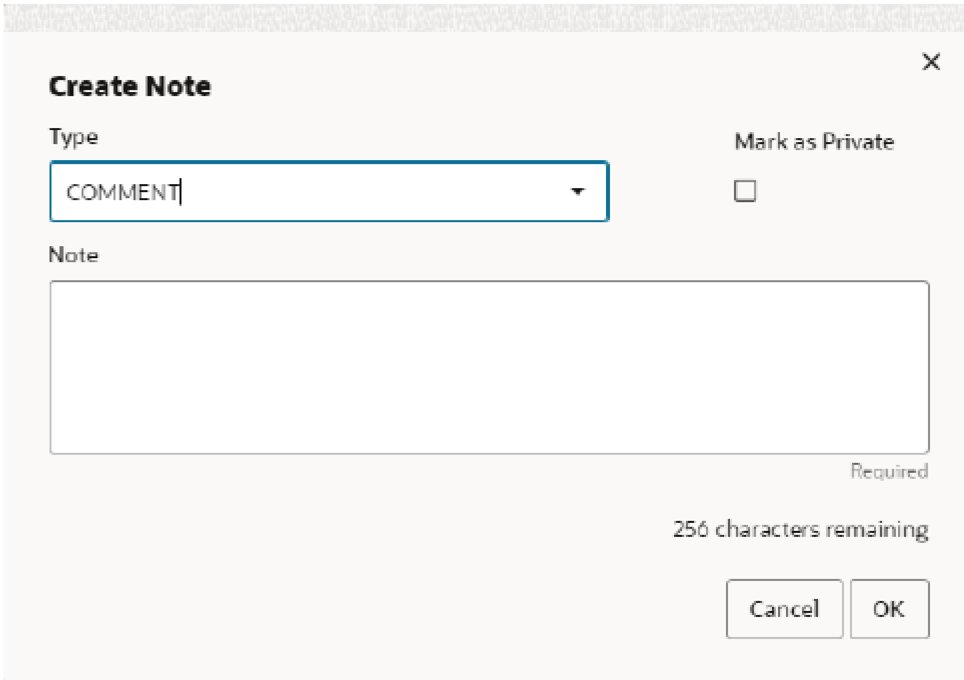
Create a Note

To add a note about the customer, use one of these methods to display the Create Note window:

- Click the **Add + icon** in the top right corner of the Notes panel.
- Click the **Edit** icon in the top right corner of the Notes panel to display the Notes for Customer list, and use either action:
  – Click the **plus sign** in the toolbar
  – From the Actions menu, choose **Add**.

Any of the following actions display the Create Note window:

Figure 5-53 Create Note



To create a note:

1. If you want the note to be private, select **Mark as Private**, otherwise, leave it de-selected.
2. Select a **note type** from the Type list.
3. Enter a note of up to 256 characters in the Note field.
4. Click **OK** when you are finished to save the note. Click **Cancel** if you do not want to add the note.

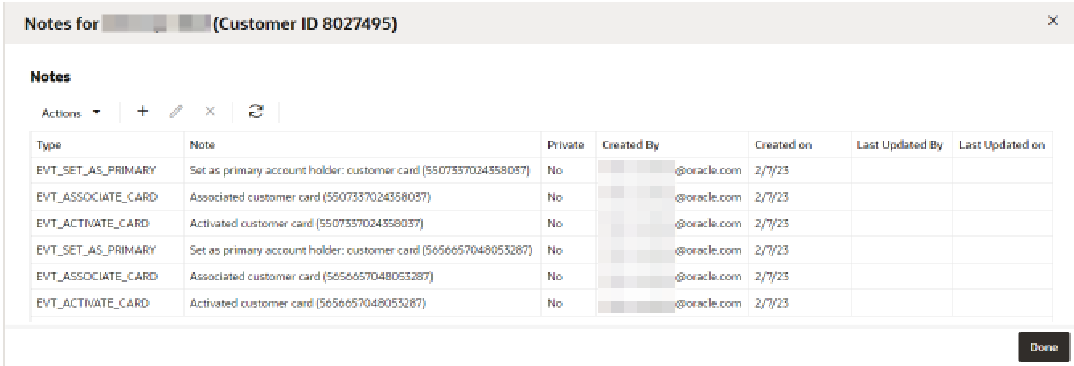
Edit a Note

You can edit notes that are listed in the Notes panel of the Customer Dashboard.

To edit a note:

1. Click the **Edit** icon at the top of the Notes panel. This displays a Notes for (Customer) window that lists the notes stored for the selected customer.

Figure 5-54 Notes for (Customer)

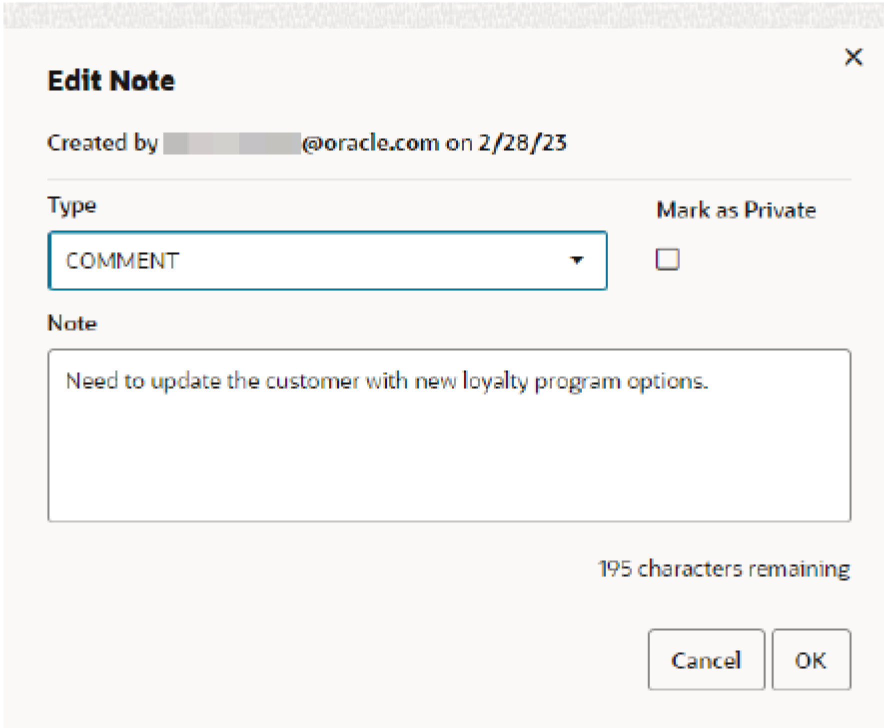


The Notes for (Customer) window provides the following information and features:

- The title bar displays the Customer Name and ID
- The user that last updated the notes and the date they were last updated is displayed beneath the title bar.
- The toolbar and actions menu provide commands to Add, Edit, and Delete a note
- The notes grid displays the following about each note:
  - Type – the type of note
  - Note – the text of the note
  - Private – indicates whether the note is private (can be seen only by the note's author or system administrators) Yes/No
  - Created By – the ID of the user who created the note
  - Last Updated By –the ID of the user who last updated the note
  - Last Updated On – the date the note was last update
- The Note list is sorted by the Last Updated On date in descending order, by default. If there is no Last Updated On date, the Created On date is used.
- If there is more information than can be displayed on the window, scroll bars are provided to navigate to hidden information.

2. Select the **note** in the grid that you want to edit, and click the **Edit** icon, or choose **Edit** from the Actions menu. This displays the note in the Edit Note window:

Figure 5-55 Edit Note



3. You can change any of following:

   Mark as Private – Select the check box to ensure that only the note's author and system administrators can see it, or de-select if you do not want to restrict access.

   Type – Select a different type from the list.

   Note – Edit the text of the note.

4. When you are finished editing the note, click **OK** to save the changes or click **Cancel** if you do not want to save the changes. Either action returns you to the Notes for (Customer) window.

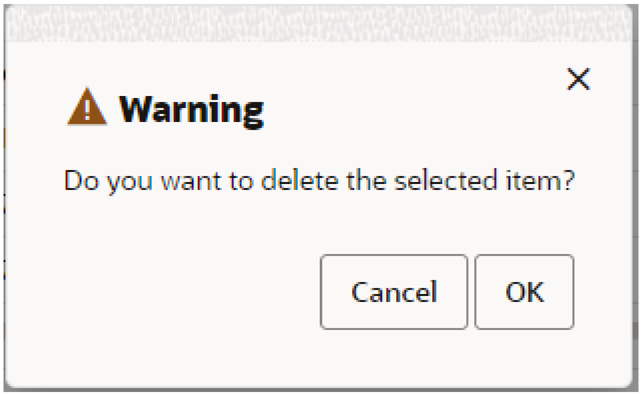
Delete a Note

You can delete a note in the Notes for (Customer) window.

To delete a note:

1. Select the note in the grid that you want to delete, and click the **Delete** icon, or choose **Delete** from the Actions menu. This displays a Warning message:

Figure 5-56 Warning Message

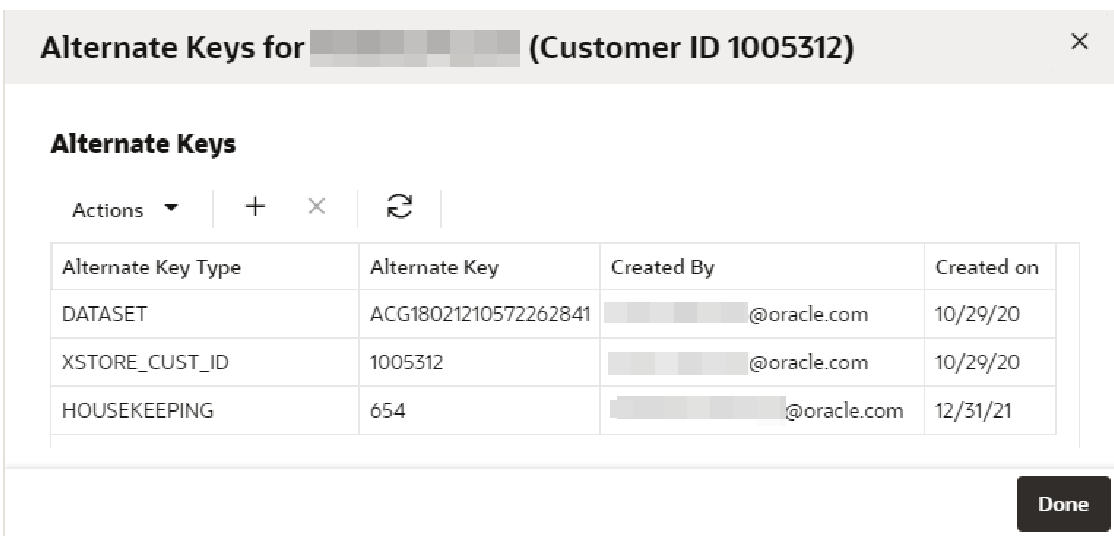


2. Click **OK** to delete the note, or **Cancel**, if you do not want to delete the note.
3. Either action returns you to the Notes for (Customer) window. If you chose **OK**, to delete the note, it is no longer displayed in the grid and is removed from the database.
4. Click **Done** in the Notes for (Customer) window when you are finished. This returns you to the Customer Dashboard.

Alternate Keys

Alternate keys are used to link customer accounts with other systems. Choose the Alternate Keys option on the Actions menu in the Customer Dashboard for access to the Alternate Keys page:

Figure 5-57 Alternate Keys



The Alternate Keys window offers the following information and features:

- The customer name and ID
- The user who last updated the window and the date it was last updated

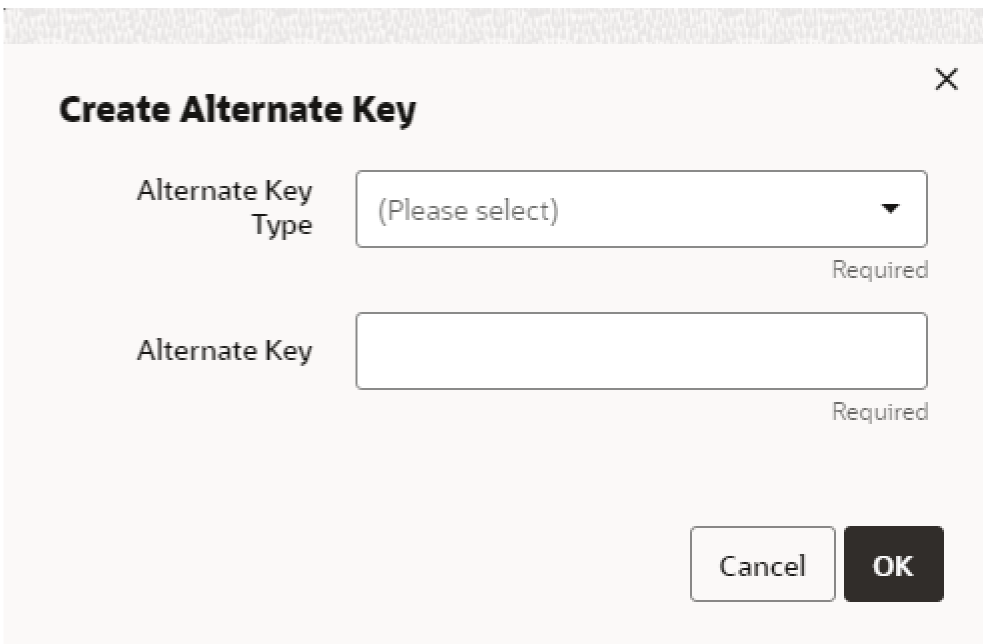
- The Actions menu and corresponding icons let you Add and Delete alternate keys.
- Alternate Key Type –The type of the alternate key (these are defined by the customer)
- Alternate Key – The value of the alternate key (the value format is defined by the customer)
- Created By – The user who created the alternate key
- Created On – The date the alternate key was created

Adding an Alternate Key

To add an Alternate Key:

1. Click the **Actions** menu in the Customer Dashboard and choose **Alternate Keys**. This displays an Alternate Keys window listing the customer's alternate keys.
2. Click the **Add+** icon, or choose **Add** from the Actions menu. This displays a Create Alternate Key window.

Figure 5-58 Create Alternate Key



3. Select an Alternate Key Type from the list.
4. Enter the **value** of the new alternate key in the Alternate Key field.
5. Click **OK** to save the new alternate key and return to the Alternate Keys window, click **Cancel** to return without saving the alternate key.

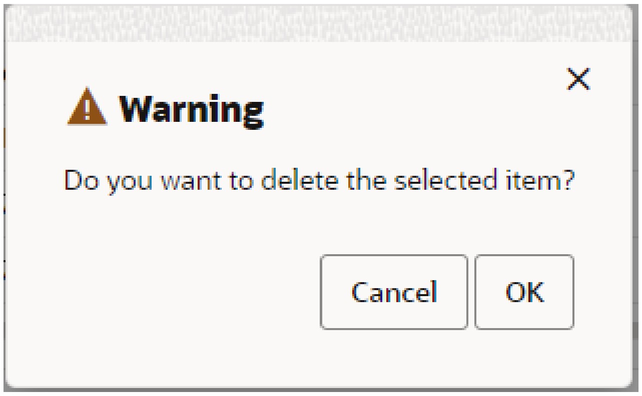
Deleting an Alternate Key

To delete an alternate key:

1. Select the alternate key that you want to delete.
2. Click the **Delete** icon, or chose **Delete** from the **Actions** menu.

This displays a Warning message asking you to confirm that you want to delete the alternate key.

Figure 5-59 Warning

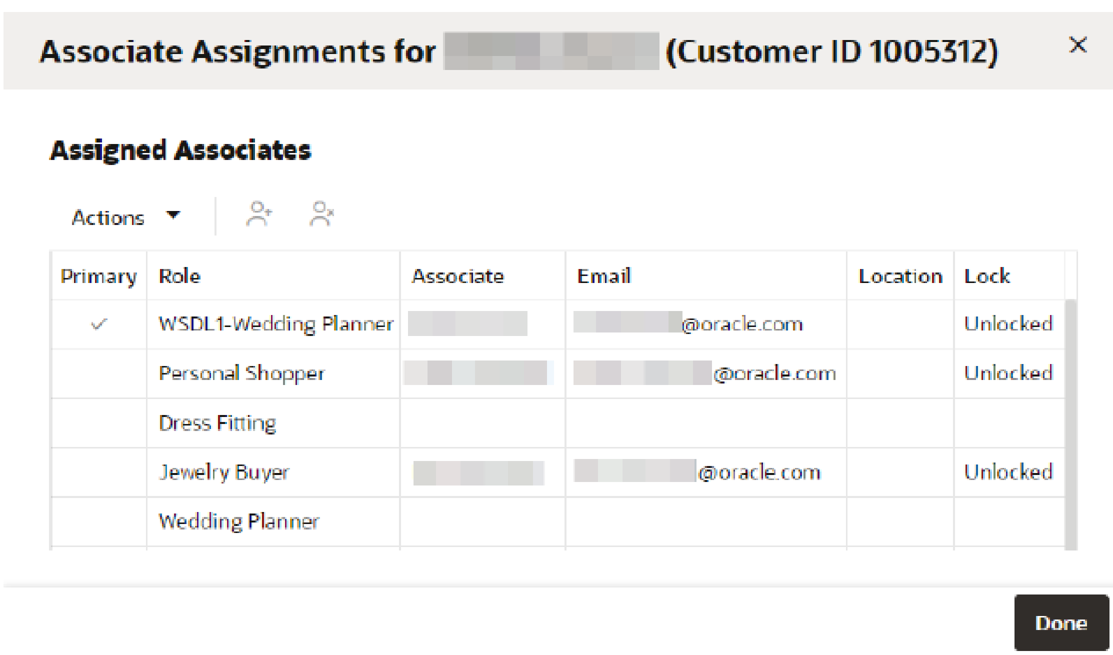


3. Click **OK** to delete the alternate key, or **Cancel**, if you do not want to delete the alternate key.
4. Either action returns you to the Alternate Keys window. If you chose **OK**, to delete the alternate key, it is no longer displayed in the grid and is removed from the database.
5. Click **Done** in the Alternate Keys window when you are finished. This returns you to the Customer Dashboard.

Associate Assignment

The Associate Assignment page lets you add, update, or delete associates assigned to a role for a customer. Choose the **Associate Assignment** option on the **Actions** menu in the Customer Dashboard for access to the Associate Assignment page:

Figure 5-60 Associate Assignment



The Associate Assignment window offers the following information and features:

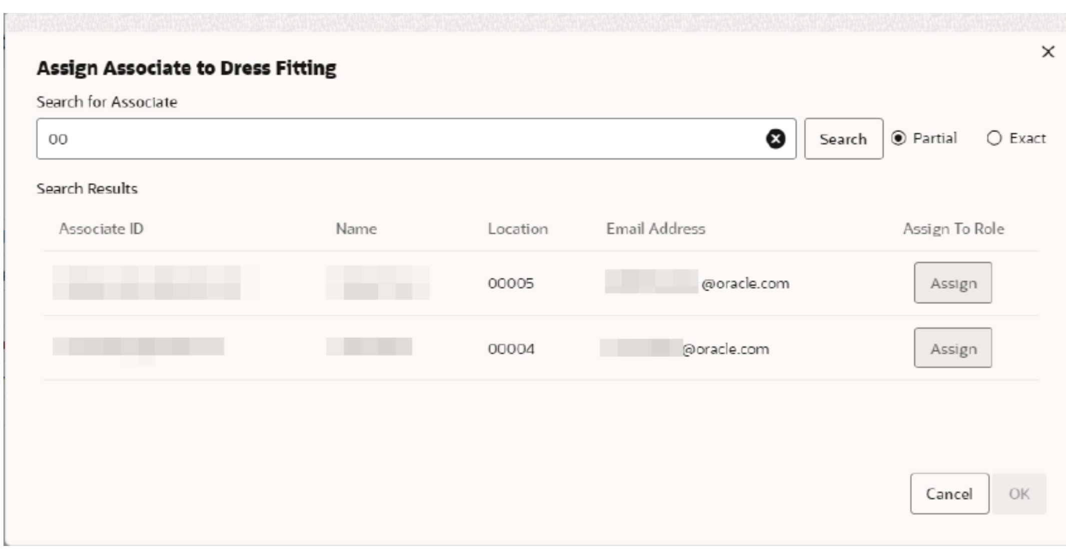
- The customer name and ID
- The user who last updated the window and the date it was last updated
- The Actions menu and corresponding icons let you Assign and Unassign associates.
- Primary – Indicates the pre-designated Primary role, which is set by the client.
- Role – Associate Role. See the *Oracle Retail Customer Engagement Cloud Service Implementation Guide* for more information about Associate Roles
- Associate – Name of the associate
- Email – The email of the associate
- Location – ID of the associate's location
- Lock – Indicates whether the associate user assignment can be changed (Unlocked) or not changed (Locked).
  - If an associate is not assigned, this field is blank.
  - When the assignment is locked, the logged in user must be the same as the assigned user to edit or unlock the associate user assignment, with the exception of a system administrator. The system administrator can edit any assigned user.
  - If a user without the privileges to change the associate assignment attempts to do so, an error message displays: *The assignment is locked, and can only be changed by the assigned user or a system administrator.*

Assigning an Associate

To assign an associate to a role for a customer:

1. In the Associate Assignment grid, select the **role** to which you want to assign an associate.
2. From the Action menu, choose **Assign**, or click the **Assign** icon. This displays the Assign Associate dialog:

Figure 5-61 Assign Associate



3. In the **Search for Associate** prompt, enter the ID, Name, Location or E-mail of the associate you want to assign to the role. Select **Partial** to search on a partial entry, or **Exact**, to search for only exact matches.
4. Click **Search**. This displays the associates matching the search criteria in the Search Results grid.
5. Click **Assign** in the row of the associate that you want to assign to the role. Assign changes to **Unassign**, and the Locked check box is displayed:
6. If you want to lock the assignment so that only you and system administrators can change it, select the Locked check box. If not, leave it clear.
7. Click **OK**. This returns you to the Associate Assignments page. The associate added to the role is displayed in the assignment row.

Unassigning an Associate

To un-assign an associate from a role for customer:

1. In the Associate Assignment grid, select the **assignment** from which you want to un-assign an associate. Only one assignment can be selected to un-assign at one time.
2. From the Action menu, choose **Unassign**, or click the **Unassign** icon. This removes the associate from the role, and their information is deleted from the assignment row.
3. Click **Done** when you are finished with associate assignments. This returns you to the Customer Dashboard

Franchisee Assignment

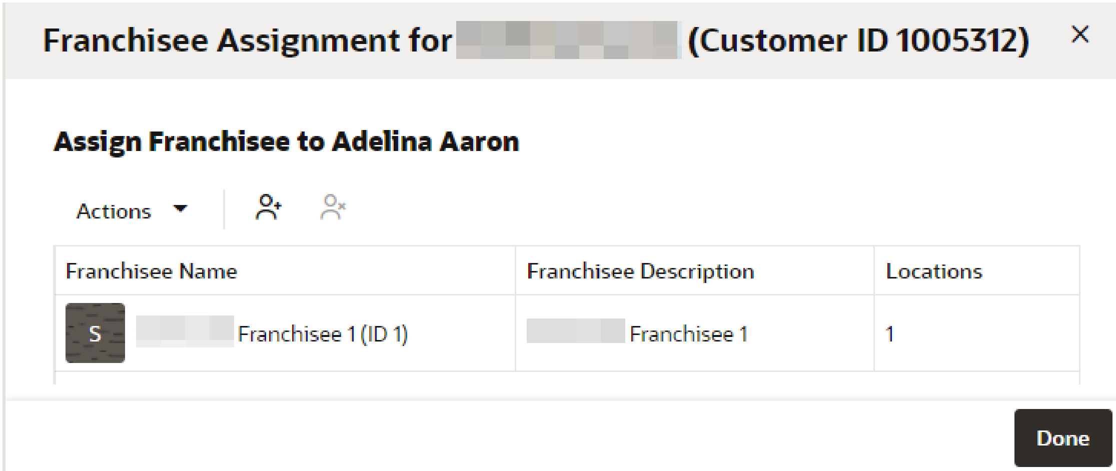
The Franchisee Assignments page displays information about the franchisees to which the customer has been assigned.

> **Note:**
>
> The Franchisee Assignment option is only displayed if the (Franchisee) user has access to more than one Franchisee.

For more information about how franchisees are initially set up and the configuration is enabled, see the Customer Engagement Cloud Services Implementation Guide

Choose the **Franchisee Assignment** option on the Actions menu in the Customer Dashboard for access to the Franchisee Assignment page:

Figure 5-62 Franchisee Assignment



The Franchisee Assignment page offers the following information and features:

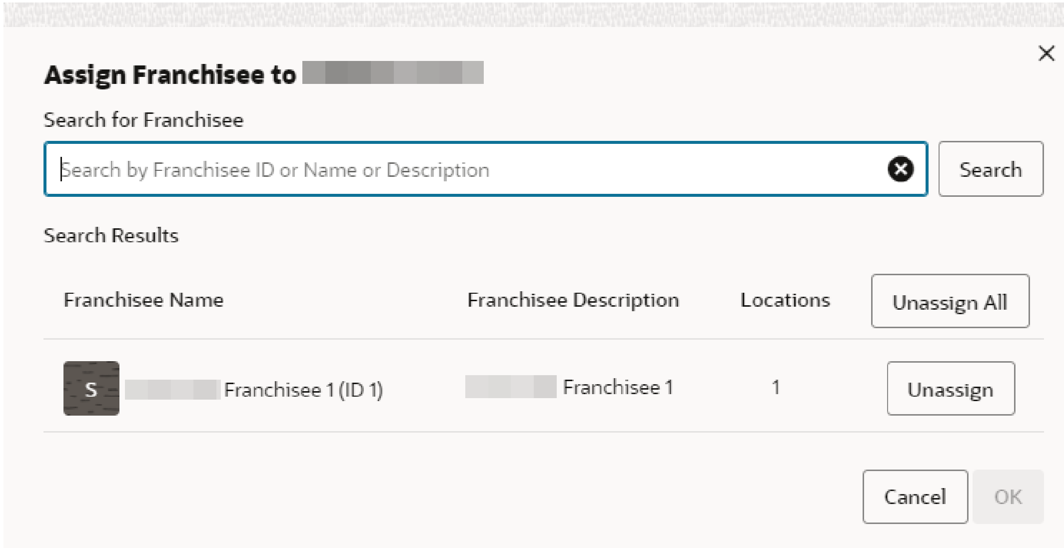
- The customer name and ID
- The user who last updated the window and the date it was last updated
- The Actions menu and corresponding icons let you Assign and Un-assign franchisees.
- Franchisee ID – ID number of the franchisee
- Franchisee Name – Name of the franchisee
- Franchisee Description – a description of the franchisee

Assigning a Franchisee

To assign a Franchisee to a customer:

1. Choose **Assign** from the Actions menu, or click the **Assign** icon. Either action displays the Assign Franchisee dialog:

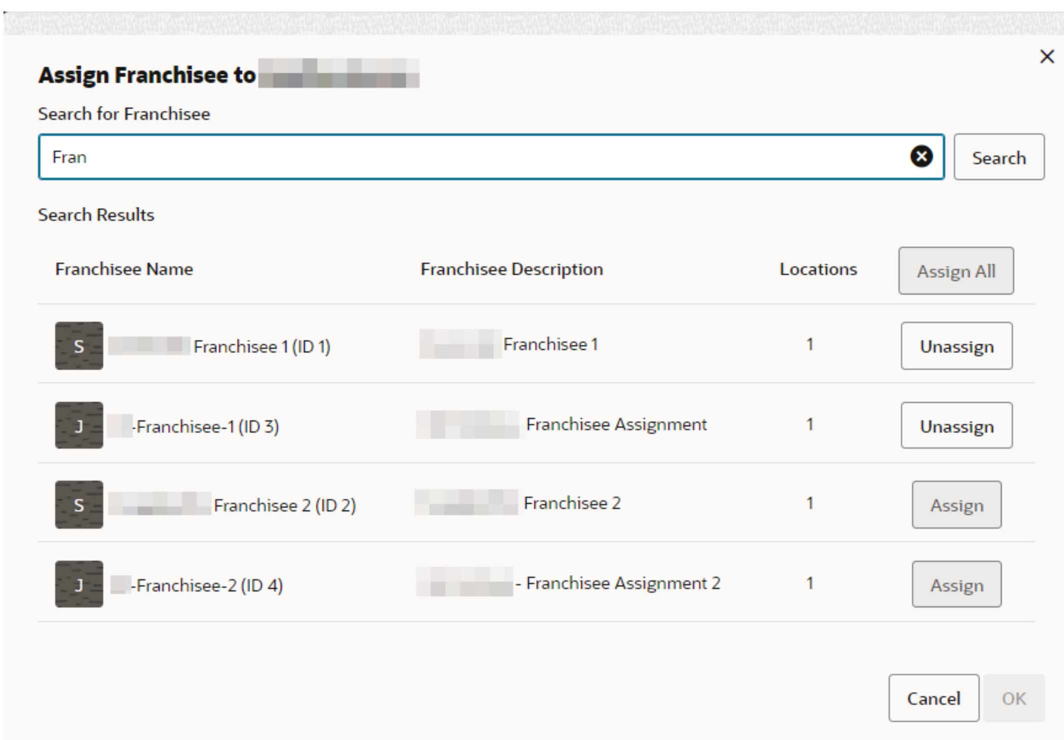
Figure 5-63 Assign Franchisee



2. Enter a full or partial franchisee ID, name or description in the Search for Franchisee field and click **Search**. A list of franchisees matching the search text is displayed in the Search Results grid.

> **Note:**
>
> The only franchisees to display are those to which the associate has access.

Figure 5-64 Assign Franchisee - Results



3. The Search Results list all franchisees that match the search criteria to which the associate has access. If the franchisee is already assigned to the customer, Unassign is enabled. If the franchisee is not assigned, **Assign** is enabled. In the row of the franchisee that you want to assign, click **Assign**.
   - To assign a Franchisee, click **Assign**.
   - To unassign a Franchisee, click **Unassign**.
4. Click **OK** to accept the assignment or Cancel to cancel. Either action returns you to the Franchisee Assignment page. If you click **OK**, the new franchisee assignment displays in the grid.

Unassign a Franchisee

To unassign a franchisee:

1. In the Assign Franchisee grid, select the franchisee that you want to unassign from the customer.
2. Choose **Unassign** from the Actions menu, or click the **Unassign** icon. Either action unassigns the franchisee from the customer and deletes the franchisee from the grid.

> **Note:**
>
> Click the **Unassign All** button to remove all assigned Franchisees.

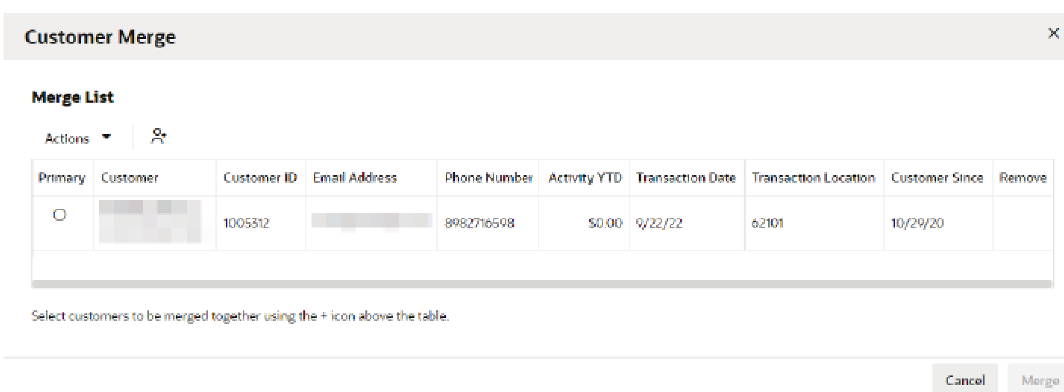
Merge

Customer Merges combine multiple Customer records into one, new Customer record. This new Customer record includes the Transaction, Card, and Account information from all the merged Customer records.

To merge customer records:

1. From the **Actions** menu in the Customer Dashboard, choose **Merge**. This displays the Customer Merge window:

Figure 5-65 Customer Merge



The Actions menu and corresponding icon lets you **Add Customers to Merge**.

The Customer Merge page offers the following information and features:

- Primary – When selected, indicates the primary customer
- Customer – The customer name and address
- Customer ID – The ID of the Customer
- Email Address – The customer email address
- Phone Number – The customer phone number
- Activity YTD – The amount of the customer's transactions for the year to date
- Transaction Date – The date of the last transaction
- Transaction Location – The location of the last transaction
- Customer Since – The customer creation date
- Remove – Click to remove a customer from the list

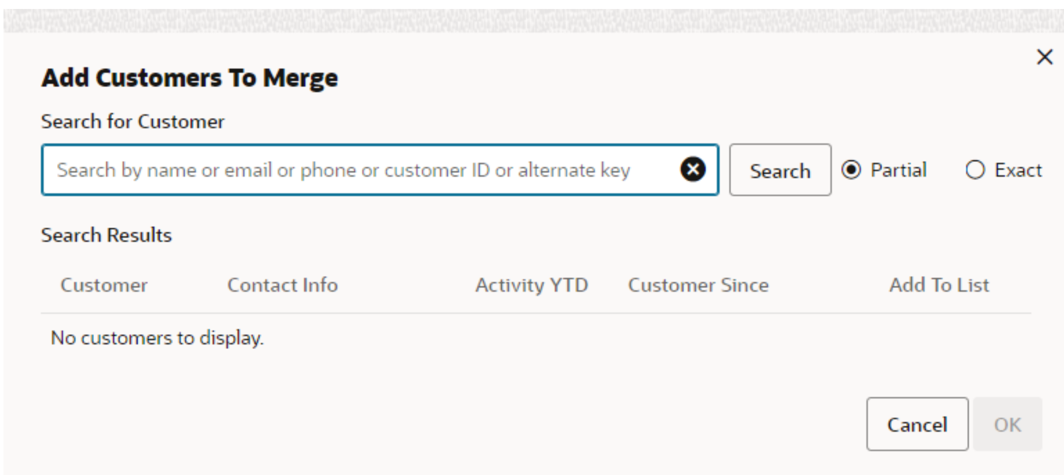
2. Click **Merge** to accept the merge, or click **Cancel** to close the window without saving.

Merging Customers

First: Add Customers to Merge

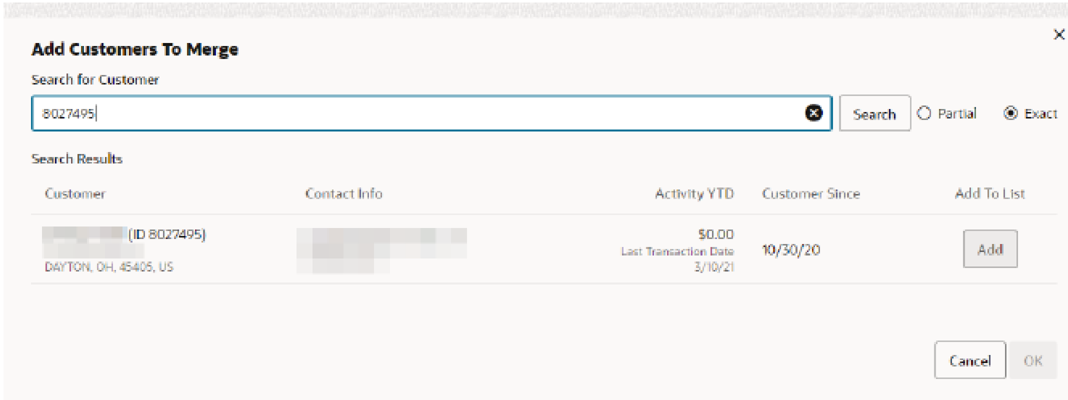
1. In the Customer Merge page, click the **Actions** menu and choose **Add Customers to Merge**, or click the **Add Customers to Merge +** icon. Either action displays the Add Customers to Merge dialog:

Figure 5-66 Add Customers to Merge



2. In the **Search for Customer** prompt, enter the Name, Email, Phone, ID, or Alternate Key of the customer you want to add to the Merge list. Select **Partial** to search on a partial entry, or **Exact**, to search for only exact matches.
3. Click **Search**. This displays the customers matching the search criteria in the Search Results grid:

Figure 5-67 Add Customers to Merge Results



The grid displays the following information for each customer:

- Customer – the customer name, ID, and primary address
- Contact Info – the customer email address and phone number
- Activity YTD **-** the amount of the customer's transactions for the year to date, and the date of the last transaction
- Customer Since – the creation date of the customer

4. Click **Add** in the Customer row if you want to add the customer to the Customer Merge list. **Add** is replaced with **Remove**, which you can use to remove the customer.

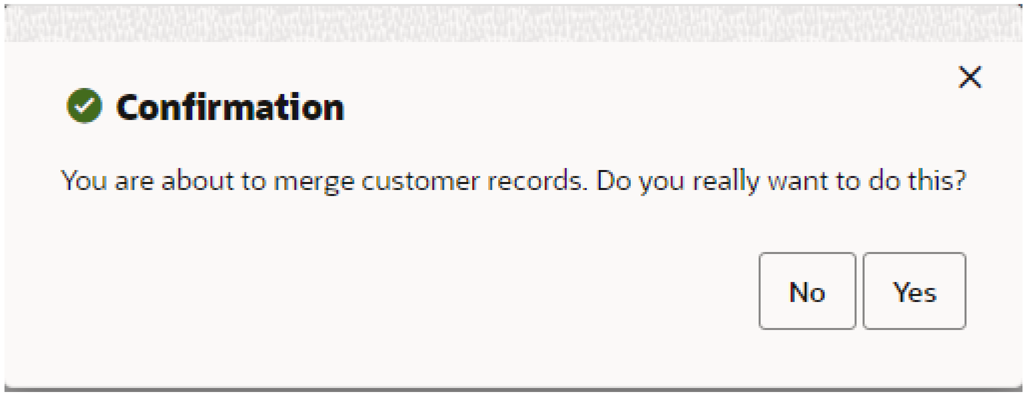
> **Note:**
>
> You can only merge up to five customers at one time.

5. Click **OK**. This returns you to the Customer Merge page with the customers added to the Merge List.

Second: Merge Customers

1. In the Customer Merge page, review the Merge List and click **Remove** to remove any customers you do not want to merge.
2. Click **Primary** in the row of the customer that you want as the primary customer.
3. Click **Merge** to display a confirmation prompt:

Figure 5-68 Confirmation



4. To merge the customer records, click **Yes**. To exit without merging the customers, either click **No** or **X**.

Working with Payment Card Tokens

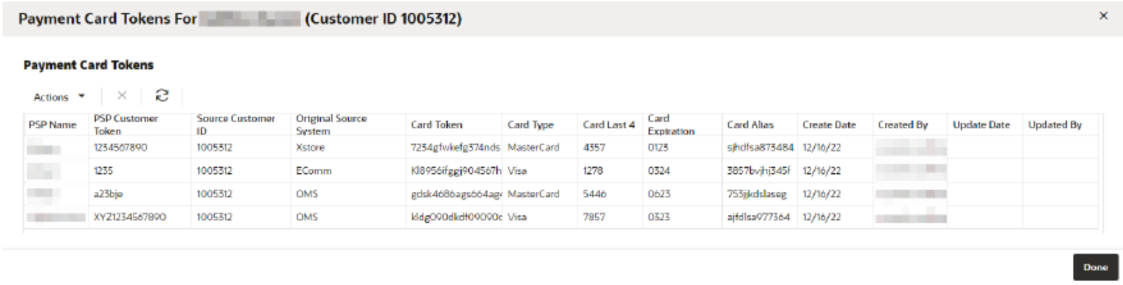
Payment Card Tokens are unique identifiers generated by a payment service provider and can be re-used to make purchases and returns more secure when using a credit or debit card. Since the card number will only be held at the payment service provider, a hacker is unable to access the card number. The payment card tokens are stored in Customer Engagement and can be shared with systems that interact directly with payment service providers.

> **Note:**
>
> This menu option will only display if the customer has payment card tokens and if they have a Payment Card Token additional security permission. See Administrator Guide for more information.

> **Note:**
>
> There are three web services (Post, Get and Delete) that are used to manage the payment card tokens. See Batch Processing and Web Services Guide for more information.

> **Note:**
>
> A ‘SAVE_PAYMENT_CARD_TOKENS’ (customer) attribute will need to be assigned to the customer to support the Payment Card Token feature for Omni Channel. When a payment card is used to make a payment for purchases, the customer needs to give permission to save the payment card token information for future payments. The value will need to be set to Yes, for payment card tokens to be saved from the external systems.

Figure 5-69 Payment Card Tokens For Customer



The Payment Card Tokens window offers the following information:

- Customer Name and ID
- The user who last updated the payment card token table.
- The Actions menu and corresponding icons let you Delete payment card tokens. See Delete or Delete All Payment Tokens for more information.

> **Note:**
>
> Payment Card Tokens can only be added via web service from integrated systems that interact directly with payment service providers. Examples: Cybersource and Adyen.

Payment Card Tokens fields include:

- PSP Name (Payment Service Provider) - The name of the payment service provider that supplied the payment card token. (**Examples:** Cybersource, Adyen)
- PSP Customer Token - The unique token provided by the payment service provider.
- Source Customer ID - The customer ID sent to the payment service provider initially and associated with this payment card token.
- Original Source system - The system that sent the initial request to the payment service provider.
- Card Token - The unique value supplied by the payment service provider when the initial request for payment was sent.
- Card Type - The credit or debit card type.
- Card Last 4 - The last four digits of the card number used when the payment card token was generated.
- Card Expiration - The month and year the card expires.
- Card Alias - The name given to a card that can be used to identify a card used for multiple individuals on the same card for a household.

> **Note:**
>
> A separate unique payment card token is generated by the payment service provider when there is more than one individual on the card.

- Create Date - The user that created the payment card token through the web service.
- Created By - The date the payment card token was added into Customer Engagement.
- Update Date - The user that last updated the payment card token.

> **Note:**
>
> The payment card token record can only be updated through the web service and is limited to the card expiration field.

- Updated By - The date the payment card token record was updated.

The following actions for Payment Card Tokens include:

- Refresh
- Delete
- Delete All

Refresh Payment Card Tokens Results

Click the **Actions** menu, then click **Refresh**, or click the **Refresh** icon to refresh the results.

Deleting a Payment Card Token

Highlight the **row** of the Payment Card Token you want to delete and click the **Actions** menu, then click **Delete**, or click the **Delete** icon to open the delete confirmation window. Click **OK** to delete the Payment Card Token for that Customer or **Cancel** to close the window without deleting the row.

Deleting All Payment Card Tokens

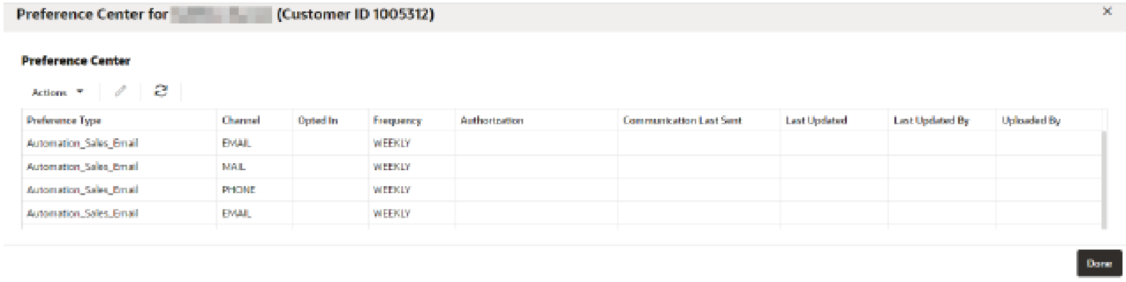
Click the **Actions** menu, then click **Delete All** to open the delete all confirmation window. Click **OK** to delete all of the Customers' Payment Card Tokens, or **Cancel** to close the window without deleting the rows.

Preference Center

The Preference Center page displays the contact preferences for a customer. For more information about how Preference Center channels are initially set up and the configuration is enabled, see the *Oracle Retail Customer Engagement Cloud Service Implementation Guide*.

Choose the **Preference Center** option on the **Actions** menu in the Customer Dashboard for access to the Preference Center page:

Figure 5-70 Preference Center



The Preference Center page offers the following information and features:

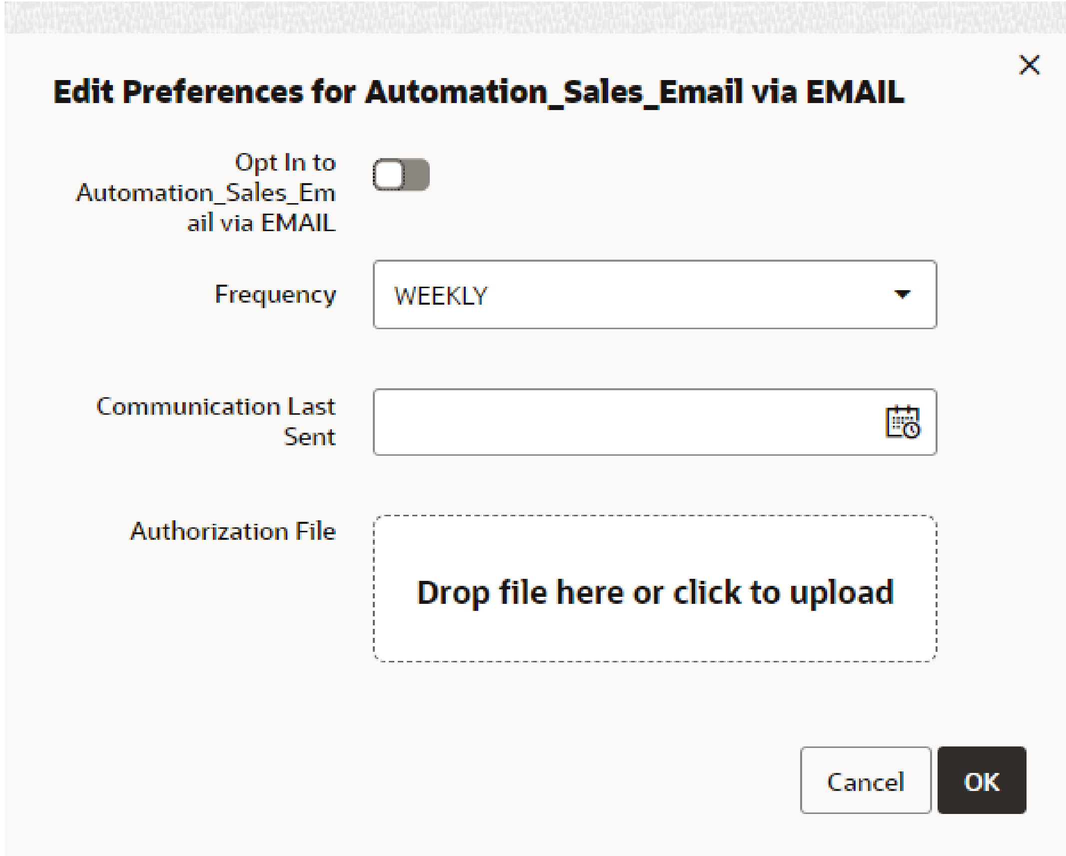
- The customer name and ID
- The Actions menu and corresponding icons let you Edit a preference.
- Preference Type – Name of the preference center. This is displayed for all the channels in a preference center.
- Channel –The communication channel
- Opted In – Indicates whether the customer has opted to be contacted through the channel. If there is a check mark in the field, then the customer is contacted through the channel.
- Frequency – The frequency at which the customer is contacted through the channel
- Authorization – Name of the file in which the customer authorized communication
- Communication Last Sent – Date the communication was last sent to the customer
- Last Updated – Date and time the channel preferences for this customer were last updated
- Last Updated By – ID of the user who last updated the channel preferences for this customer.
- Uploaded By – User who last updated the image/file. This is populated by the logged in user who uploads the latest file on the preference.

Editing a Preference

To edit a Preference:

1. In the Preference Center grid, select the preference that you want to edit.
2. From the Actions menu, choose **Edit**, or click the **Edit** icon. This displays the Edit Preference dialog:

Figure 5-71 Edit Preferences

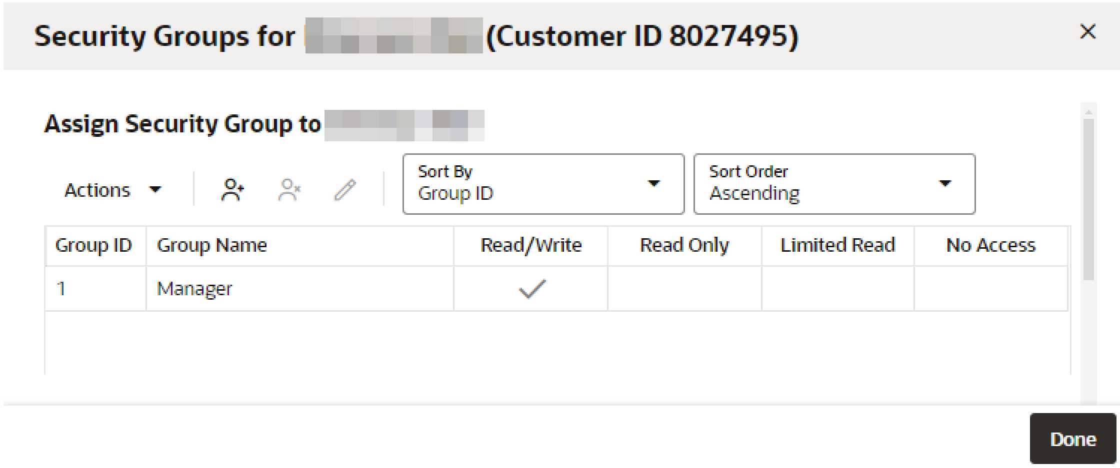


3. Edit the fields that you want to change:
   - **Opt In to** – Click to the on position to indicate that the customer accepts communication from this channel, or click off, to indicate the customer does not want communication.
   - **Frequency** – Select the frequency with which the customer receives communication from this channel.
   - **Communication Last Sent** – Click the date in the calendar on which communication from the channel was last sent.
   - **Authorization File** – Drag and drop a file authorizing the communication, or click in the field to search for a file to upload.
4. Click **OK**. This returns you to the Preference Center page.

Security Groups Assignment

You the ability to assign or unassign a Security Group to a customer, so that customer details will be protected based on the privileges for the assigned security group. Choose the **Security Groups Assignment** option on the **Actions** menu in the Customer Dashboard for access to the Security Groups page.

Figure 5-72 Security Groups



Security Groups can be sorted ascending or descending using the following options:

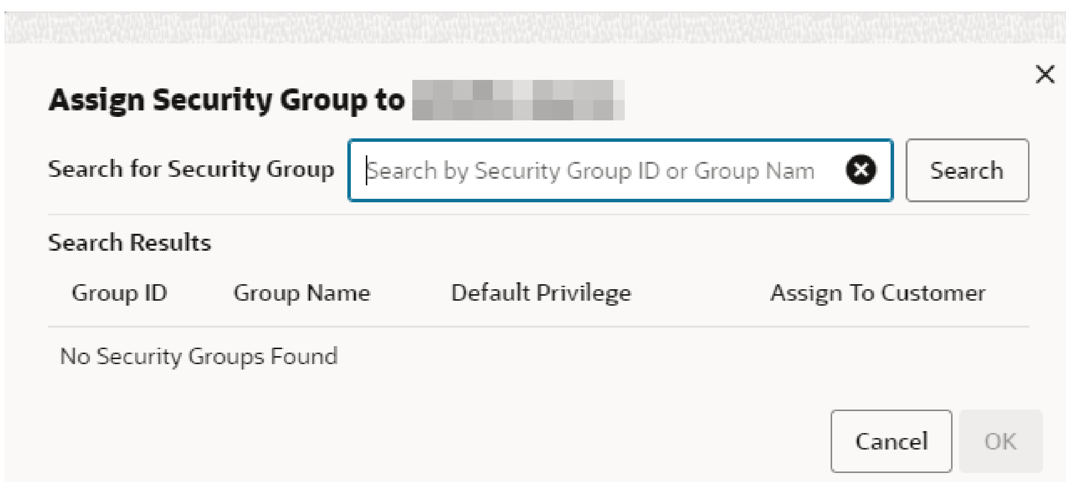
- Group ID (default)
- Group Name

Assign Security Group

To assign a Security Group do the following:

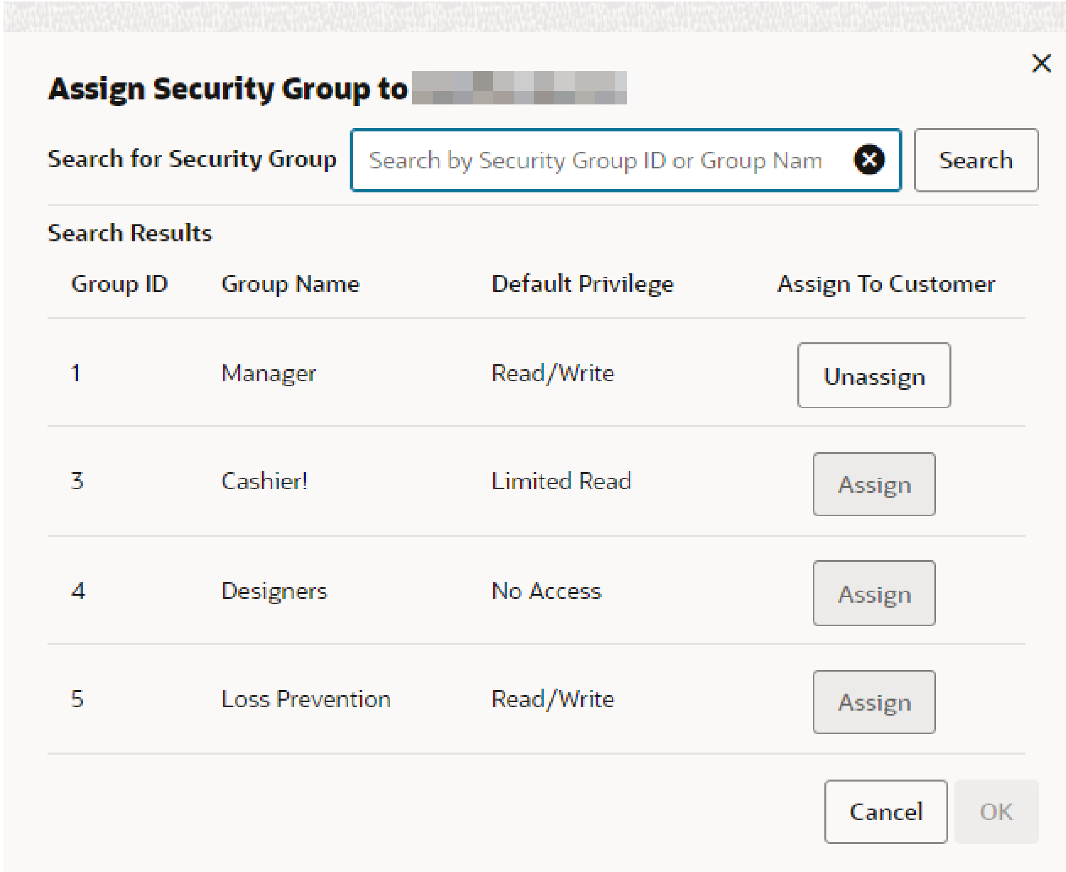
1. Click the **Assign** icon or the click the **Action** menu and click **Assign**. The Assign Security Group to Customer displays.

   Figure 5-73 Assign Security Group

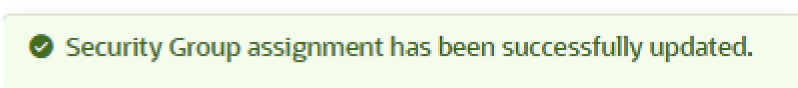
2. Enter the **Security Group ID** or **Group Name**.
3. Click **Search**. The search results display.

Figure 5-74 Assign Security Group To Window



4. Click **Assign** to assign to customer, or click **Unassign** to remove the assignment.
5. Click **OK** to save the assignments or click **Cancel** to close the window without saving. A notification appears indicating a successful update.

Figure 5-75 Notification

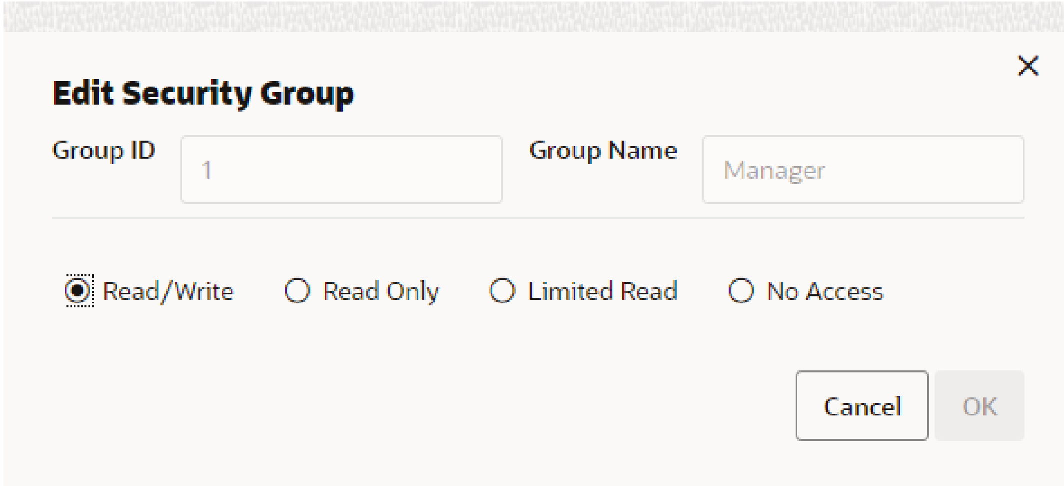


Edit Security Group

To edit a Security Group do the following:

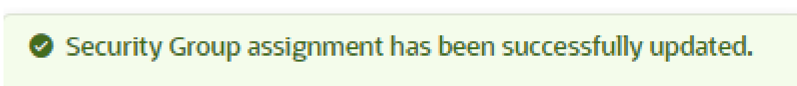
1. Click the **Assign** icon or the click the **Action** menu and click **Edit**. The Edit Security Group window displays.

Figure 5-76   Edit Security Group



2. Select a **Privilege Type**.
   - Read/Write - Users in the security group can read and update all data for customers who have had the security group applied.
   - Read Only - Users in the security group can read all data for customers who have had the security group applied, but cannot make updates.
   - Limited Read - Users in the security group can read some data for customers who have had the security group applied, but cannot read sensitive customer information (such as address, telephone numbers, and email addresses) and cannot make updates.
   - No Access - A user in the security group will not even see that the customer exists in the system.
3. Click **OK** to save the privileges or click **Cancel** to close the window without saving. A notification appears indicating a successful update.

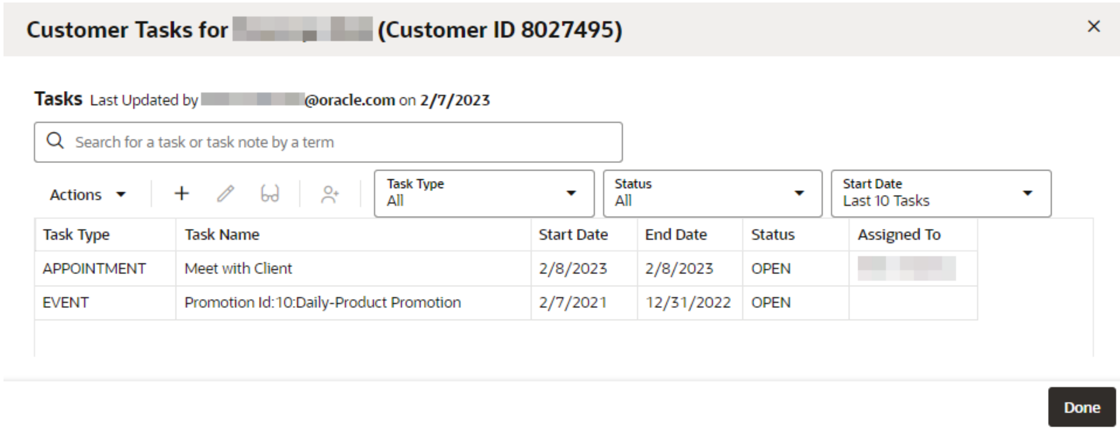
Figure 5-77   Notification



Tasks

The Tasks page displays the tasks that are associated with the customer. Choose the **Tasks** option on the **Actions** menu in the Customer Dashboard for access to the Tasks page:

Figure 5-78 Customer Tasks



The Tasks page offers the following information and features:

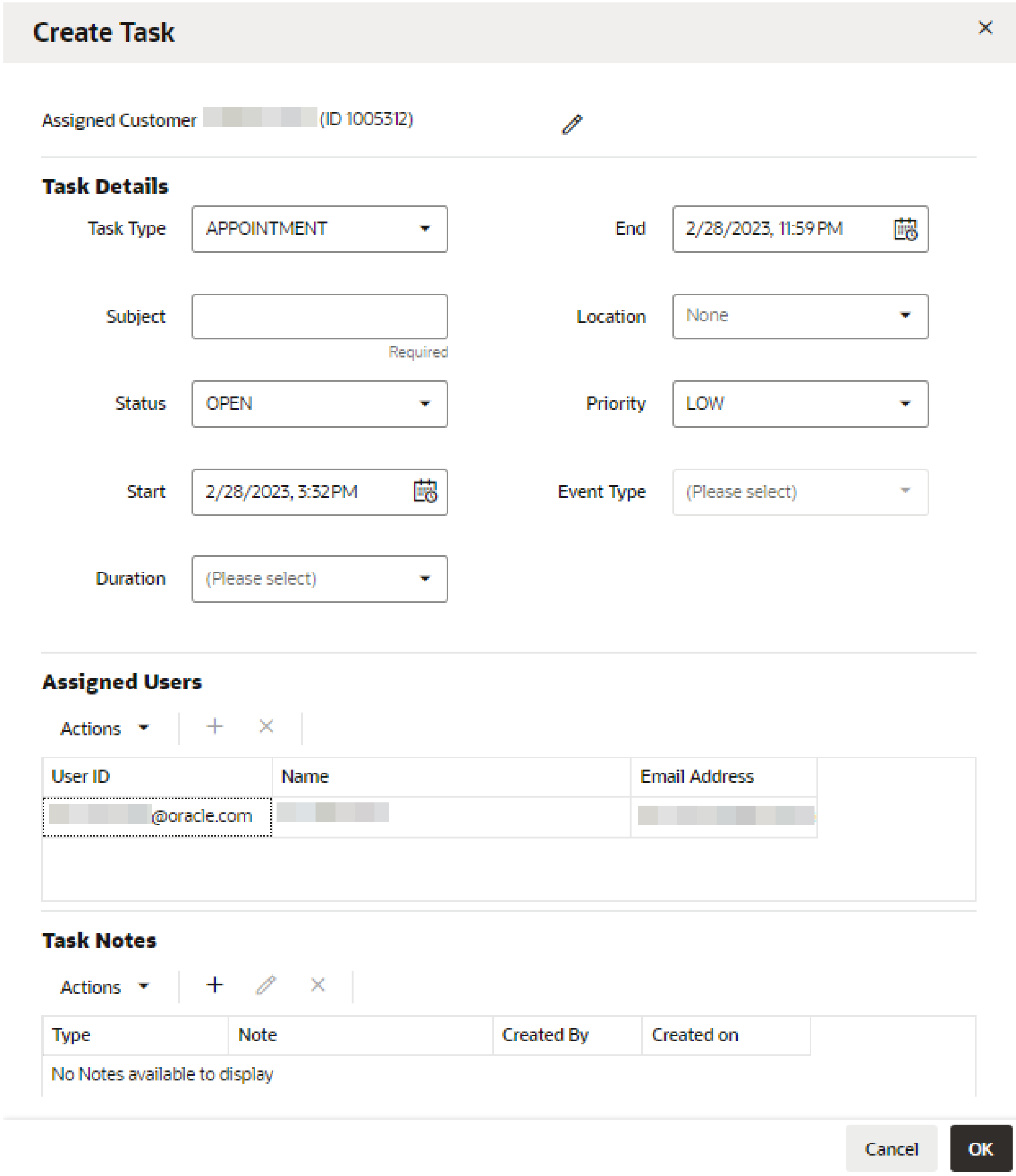
- The customer name and ID
- The user who last updated the window and the date it was last updated
- The Search panel lets you search for a task or task note by term
- The Actions menu and corresponding icons let you Add, Edit, View, and Reassign a task
- Task Type – The type of task. These are configured by the customer. See the `Oracle Retail Customer Engagement Cloud Services Implementation Guide` for information about configuring custom Task types
- Task Name – A name for the task that was entered by the user who created the task
- Start Date – The start date of the task
- End Date – The end date of the task
- Status – The selected status of the task
- Assigned to – The associate to whom the task is assigned

Adding a Task

To add a task:

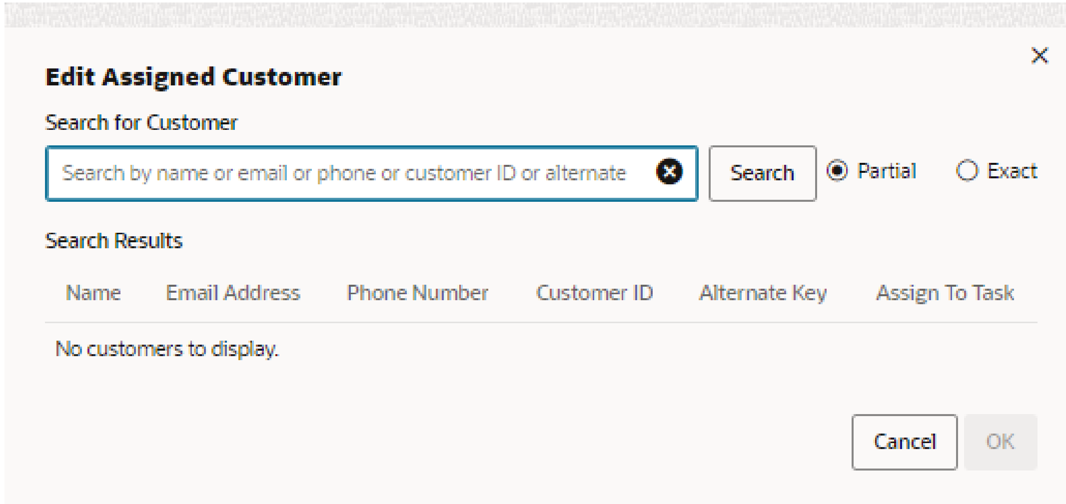
1. Choose **Add** from the Actions menu, or click the **Add** icon. This displays the Create Task window:

Figure 5-79 Create Task



2. If you want to change the customer assigned to the task, click the **Edit** icon next to the Assigned Customer Name and ID. This displays the Edit Assigned Customer window:

Figure 5-80 Edit Assigned Customer



a. In the Search for Customer field, enter the **Name**, **Email**, **Phone**, **Customer ID**, or **Alternate Key** of the customer you want to search for. Select **Partial** to search for customers that partially match the search text, or **Exact**, to search for an exact match.
b. Click **Search**. This displays the list of matching customers under Search Results.
c. Select the customer in the list that you want to assign to the task and click **OK**, or click **Cancel** if you do not want to change the customer assignment. This returns you to the Create Task window. If you click **OK**, the Customer Name and ID for the selected customer precede the Task Details.

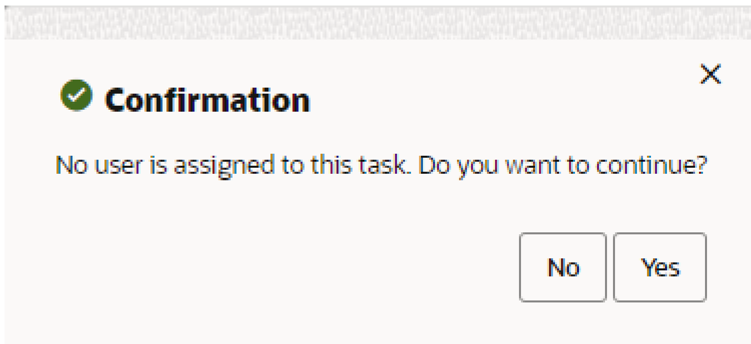
3. Enter the details for the new task. Mandatory fields are indicated with asterisks (*):
   - Task Type – Select a task type from the list. This list is determined by the customer.
   - Subject – Enter a subject. This will appear in the Task Name field.
   - Status – Select a status from among those on list:
     – Open – Set the status of your task to Open.
     – In Progress – Set the status of your task to In Progress
     – Cancelled – Set the status of your task to Cancelled.
     – Closed – Set the status of your task to Closed.
   - Start – Select a start date for the task from the calendar.
   - Duration – Select the duration of the task from the list (optional). Selecting one of the duration options will determine the value for the End Date/Time based on the option chosen.
   - End – If no selection was made in the Duration field, select an end date for the task using the calendar.
   - Location – Select a location from the list.
   - Priority – Select a priority level from the list. These are configured by the customer. See the Customer Engagement Cloud Services Implementation Guide for information about configuring custom Task Priority Codes.
   - Event Type – If you selected Event as the Task Type, select an Event Type from the list. For all other task types, this field is disabled.

4. Under Assigned Users, assign a user to the task. This defaults to the current logged-in user.

   - If you want to remove the current user, select the user and choose **Remove** from the **Actions** menu, or click the **Remove** icon. This clears the user from the grid.

     > **Note:**
     >
     > If no user is assigned to the task, and you click **OK** in this window, a Confirmation prompt is displayed:

     Figure 5-81 Confirmation

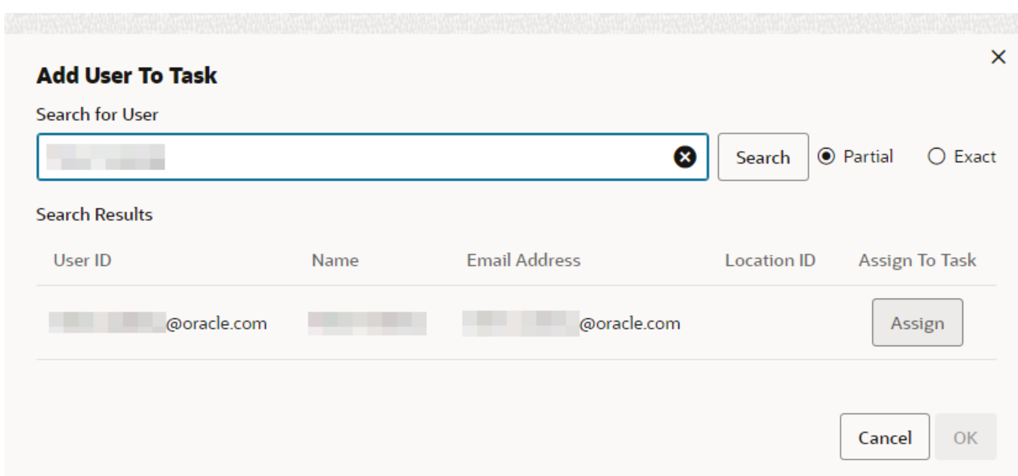
     

     – Click **No** if you want to return to the Create Task window.

     – Click **Yes** if you want to create the task without a user assigned.

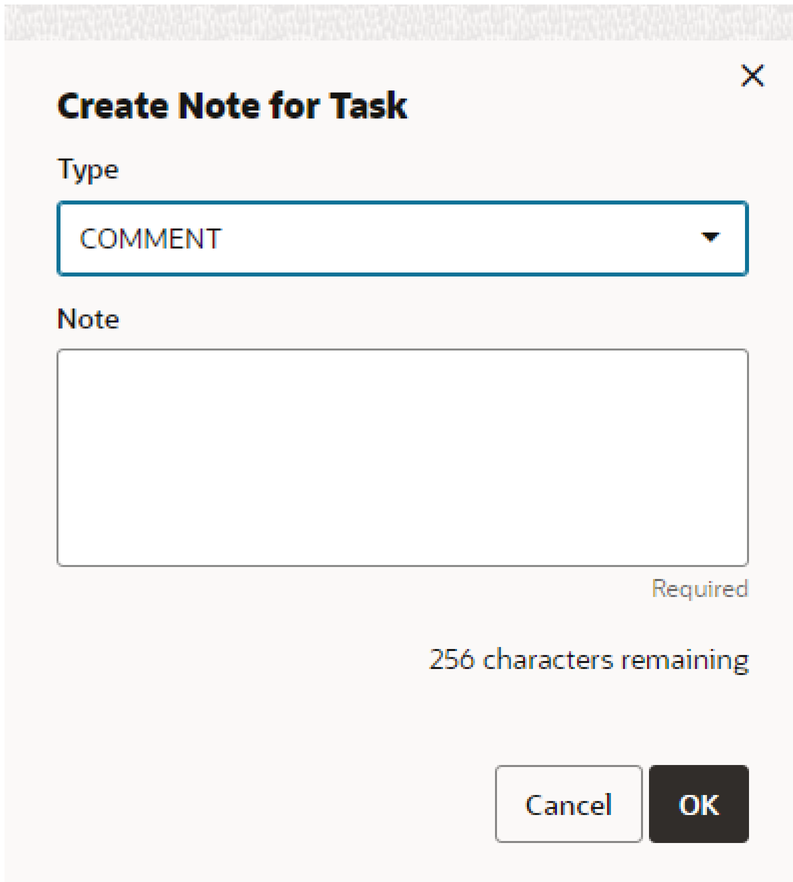
   - If you want to add a user, remove the current user (see previous) and choose **Add** from the Actions menu, or click the **Add** icon. This displays an Add User to Task dialog:

     Figure 5-82 Add User to Task - Search Results

5. In the Add User to Task Search field, enter the **User ID**, **Name**, **Email Address,** or **Location**. Select **Partial**, to search a partial entry, or **Exact**, to search for only exact matches.
6. In the Search Results list, select the **user** you want to add to the task, and click **Assign**, then click **OK**. This returns you to the Create Task window.
7. If you want to add a note with more information about the task, in the Task Notes panel, choose **Add** from the Actions menu, or click the **Add +** icon. This displays a Create Note for Task window:

Figure 5-83 Create Note for Task



   a. Select a **note type** from the Type list.
   b. Enter a **note** of up to 256 characters in the Note box.
   c. Click **OK**. This returns you to the Create Task window.
8. Click **OK**. This returns you to the Tasks page. The new task is displayed in the grid.

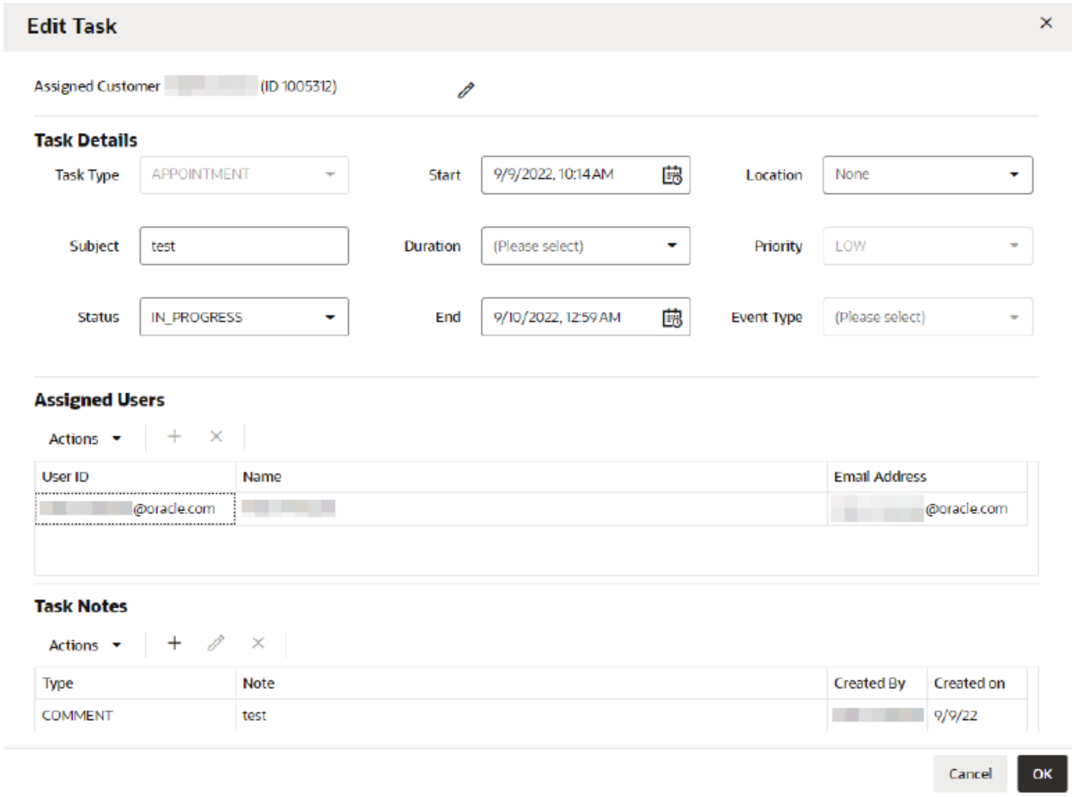
Editing a Task

To edit a task:

1. In the Tasks List, in the Customer Tasks window (see Figure 5-78, select the task that you want to edit.

2. Choose **Edit** from the Actions menu, or click the **Edit** icon. This displays the task in the Edit Task window:

Figure 5-84 Edit Task



- The user who created the task and the date it was created are displayed at the top of the window.
- The Assigned Customer Name and ID precede the Task Details. You can change the assigned customer.
- The Task Type and Event Type fields are not editable.

3. If you want to change the customer assigned to the task, click the Edit icon next to the Assigned Customer Name and ID. This displays the Edit Assigned Customer window. See Adding a Task for more information on editing the assigned customer.
4. Modify what you want to change in the Task Details, Assigned Users, and Task Notes panels. See Adding a Task for more information on entering information in these fields.
5. Click **OK** to return to the Customer Tasks page. Or, click **Cancel** to return to the Customer Tasks page without saving any of your changes.

   If you clicked **OK** to save the changes, the Update User and Update Date are updated to that of the logged-in user and the date/time the changes were saved and displayed at the top of the Customer Tasks window.

Viewing a Task

To view a task:

1. In the Tasks List, in the Customer Tasks window (see Figure 5-78) select the task that you want to view.
2. Choose **View** from the Actions menu, or click the **View** icon. This displays the task details in view-only mode in the View Task window.
3. Review the task details. See Adding a Task for more information on the task details in these fields.
4. Click **Done** when you are finished reviewing the task details. This returns you to the Tasks page.

6
Promotions

Overview

In Customer Engagement, a Promotion defines an offer, within a Campaign, that is intended to provide some purchase incentive to Customers. These offers may be made available to all Customers, or they may be offered only to a specified subsets of Customers. These offers may provide price incentives on a specific item, they may provide coupons to be redeemed during a purchase, they may be messages notifying Customers of special events or pricing, or they may provide tender certificates that a Customer can use at a later date.

About this Chapter

This chapter contains the following information;

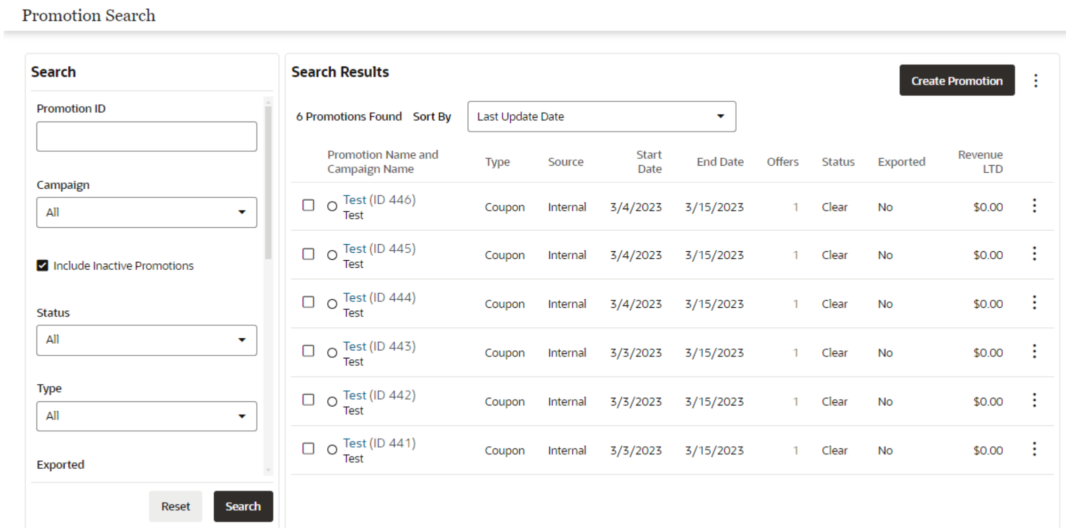
- Promotion Search
- Viewing a Promotion
- Creating a Coupon Promotion
  - Creating Additional Coupons
- Creating a Product Promotion
- Creating a Message Promotion
- Creating an Award Promotion
- Creating a Points for Purchase Promotion
- Creating a Points for Marketing Engagements Promotion
- Creating a Points Promotion
- Creating a Bounceback Promotion
- Promotion Actions
- Editing a Promotion
- Duplicating a Promotion
- Promotion Scorecard
- Promotion Information - Tabs

Promotion Search

To search for a promotion use the following steps:

1. Click the **Menu** icon.
2. Click the **Campaign Task**.
3. Click the **Promotion Search Task.**

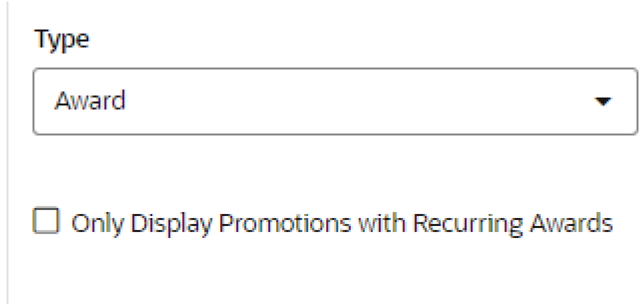
Figure 6-1 Promotion Search



4. Enter any or all of the following information to conduct a search. The Search pane contains the following filters:
   - **Promotion ID** – Returns the exact ID match of the Promotion. No partial IDs or wild cards may be used.
   - **Campaign** – Filters the list by the name of the Promotion. The default filter is all.
   - **Include Inactive Promotions** – When checked, all promotions will display. When unchecked, only active promotions will display.
   - **Status** – Filters the List by the current Promotion Status. This filter has the following options:
     – **All** - [DEFAULT] Do not filter by Status; display all Statuses
     – **Approved** - Display only Approved Promotions.
     – **Clear** - Display only Promotions that have been cleared.
     – **Conflict** - Display only Promotions with conflicts.
     – **Saved** - Display only Saved Promotions.
     – **Terminated** - Display only Terminated Promotions.
   - **Type** – Filters the List by the Type of Promotion. This filter has the following options:
     – **All** - [DEFAULT] Do not filter by Type; display all Promotion Types.
     – **Award** - Display only Award Promotions.

> **Note:**
>
> The Display Promotions with Recurring Awards option appears only when the Award type is selected.

Figure 6-2 Only Display Promotions with Recurring Awards option



  - **Bounceback** - Display only Bounceback Promotions
  - **Coupon** - Display only Coupon Promotions.
  - **Message** - Display only Message Promotions.
  - **Points** - Display only Points Promotions.
  - **Points for Marketing Engagements** - Display only Points for Marketing Engagements only.
  - **Points for Purchase** - Display only Points for Purchase Promotions.
  - **Product** - Display only Product Promotions.
- **Loyalty Bounceback Type** - Filter the list by the type of Loyalty Bounceback.

  Note: This filter is activated when the types Coupon or Product are selected. See Loyalty Bounceback for information on how to use this filter.

  - None [DEFAULT]
  - Bonus Points
  - Entitlements
- **Exported** – Filter the List by whether the promotion definition or data has been exported. This filter has the following options:
  - **All** - [DEFAULT] Do not filter by Export status; display both exported and unexported Promotions

    - **Yes** - Display only exported Promotions

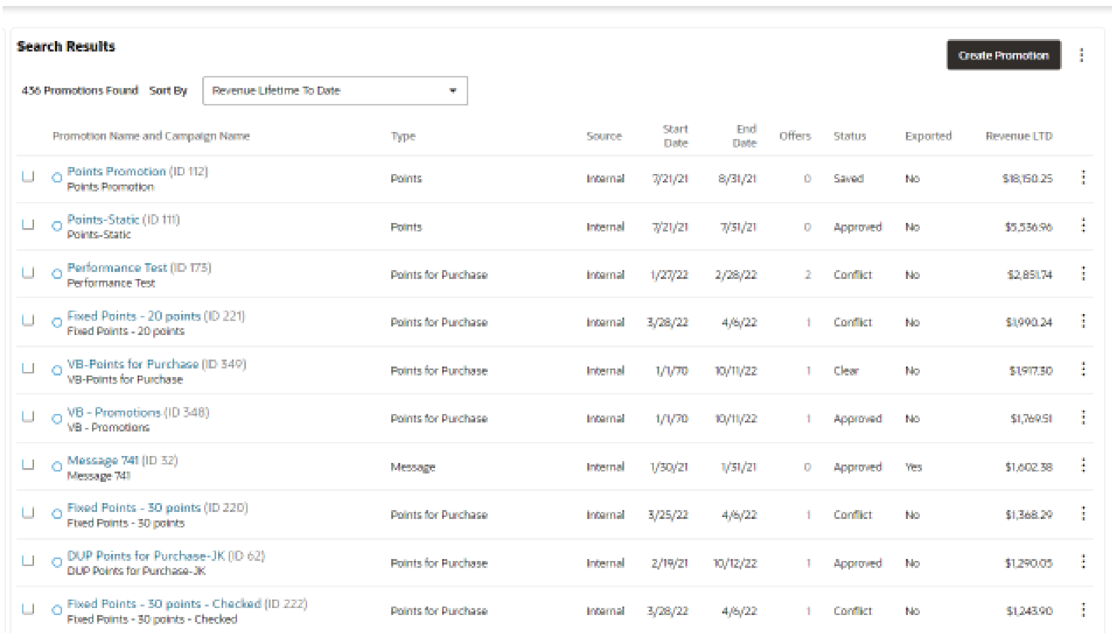
    - **No** - Display only Promotions that have not been exported
- **Attribute Type** – The type of attribute.
- **Attribute Value** – This is a dynamic field based on the attribute previously entered.
- **Franchisee ID** – This Text Field searches for Promotions by the Franchisee associated with the Promotion. The Franchisee ID criteria is only visible if the `EnableFranchiseSupport` configuration is enabled. Only Franchisees associated with the user is displayed. This will default to All.
- **Coupon Code** – Coupon code associated with the Promotion.
- **Created By** – List Box with list of associates who created available Promotions. This will default to Everyone.
- **Generated** – Indicates whether the target data for the promotion has been generated.
  - **All** [DEFAULT]
  - Yes

– No

5. Click **Search** -

> **Note:**
>
> **Reset** clears all fields and returns the list values to the default selections.

Figure 6-3 Promotion Search Results


Search Results

Create Promotion

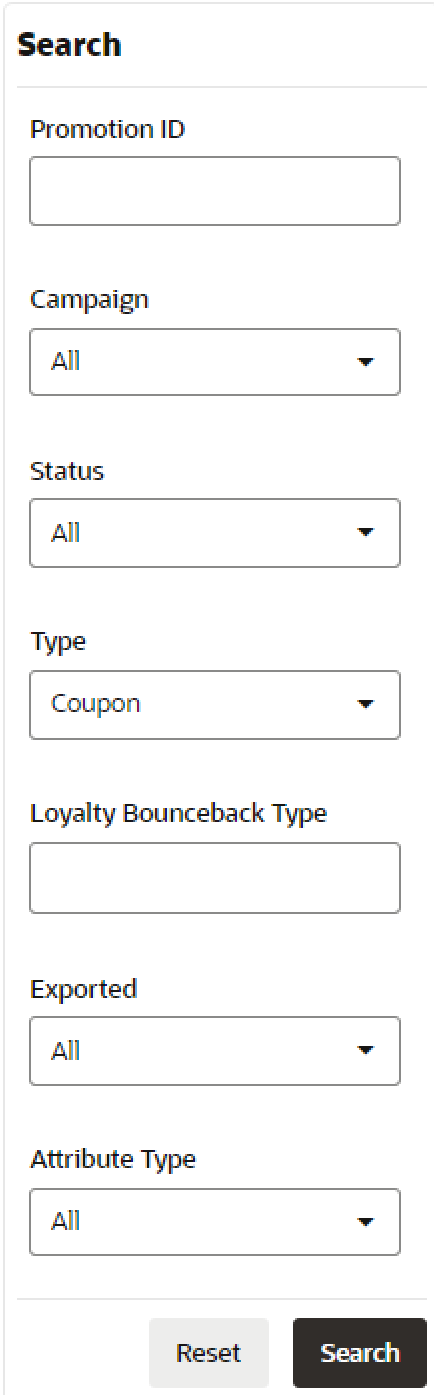
436 Promotions Found Sort By Revenue Lifetime To Date

Promotion Name and Campaign Name	Type	Source	Start Date	End Date	Offers	Status	Exported	Revenue LTD
Points Promotion (ID 112) Points Promotion	Points	Internal	7/21/21	8/31/21	0	Saved	No	$18,150.25
Points-Static (ID 111) Points-Static	Points	Internal	7/21/21	7/31/21	0	Approved	No	$5,536.96
Performance Test (ID 173) Performance Test	Points for Purchase	Internal	1/27/22	2/28/22	2	Conflict	No	$2,851.74
Fixed Points - 20 points (ID 221) Fixed Points - 20 points	Points for Purchase	Internal	3/28/22	4/6/22	1	Conflict	No	$1,990.24
VB-Points for Purchase (ID 349) VB-Points for Purchase	Points for Purchase	Internal	1/1/70	10/11/22	1	Clear	No	$1,917.30
VB - Promotions (ID 348) VB - Promotions	Points for Purchase	Internal	1/1/70	10/11/22	1	Approved	No	$1,769.51
Message 741 (ID 32) Message 741	Message	Internal	1/30/21	1/31/21	0	Approved	Yes	$1,602.38
Fixed Points - 30 points (ID 220) Fixed Points - 30 points	Points for Purchase	Internal	3/25/22	4/6/22	1	Conflict	No	$1,368.29
DUP Points for Purchase-JK (ID 62) DUP Points for Purchase-JK	Points for Purchase	Internal	2/19/21	10/12/22	1	Approved	No	$1,290.05
Fixed Points - 30 points - Checked (ID 222) Fixed Points - 30 points - Checked	Points for Purchase	Internal	3/28/22	4/6/22	1	Conflict	No	$1,243.90

Loyalty Bounceback

The Loyalty Bounceback filter appears when a Coupon type or Product type filter is selected. This enables you to view coupon promotions and or product promotions that include a loyalty bounceback.

Figure 6-4 Loyalty Bounceback Type



The Loyalty Bounceback filter is a multi-select box. Choose one or more filter options as shown in Figures Figure 6-5, Figure 6-6, Figure 6-7, and Figure 6-8. Click **X** in any selected filter to remove that option.

Figure 6-5 Loyalty Bounceback Type Filter Options

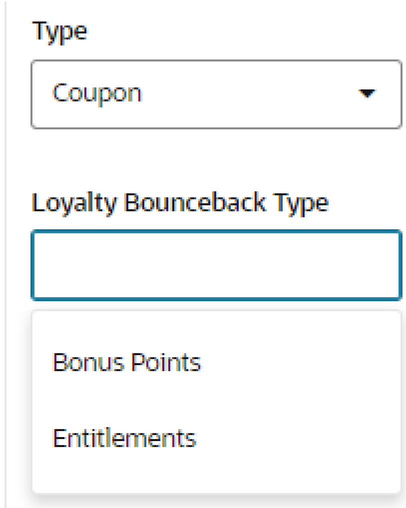


Figure 6-6 Multi-Select Options - Single Option

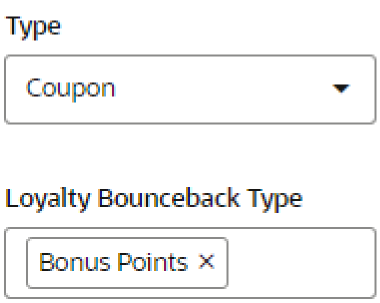


Figure 6-7 Multi-Select - Adding Additional Options

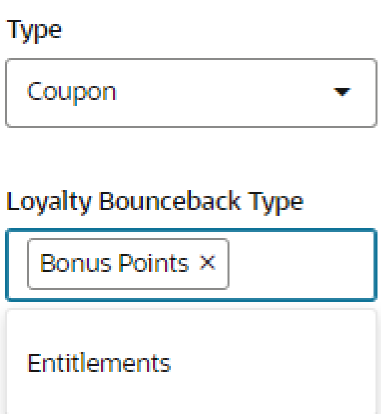
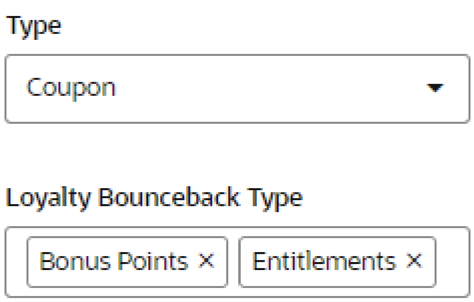


Figure 6-8 Multi-Select - All Options Selected



Working with Promotion Results

The results will indicate the number of promotions found displayed in a table. Fields include:

- **Promotion Name and Campaign Name** – The promotion and campaign name. Click the name to view the Promotion Scorecard for the promotion.
- **Type** – The type of promotion.
- **Start Date** – The start date of the promotion.
- **End Date** – The end date of the promotion.
- **Offers** – The number of offers associated with the promotion.
- **Status** – The status of the promotion.
- **Exported** – Whether or not the promotion was exported.
- **Revenue LTD** – Revenue Lifetime to Date (LTD) of the promotion.

You can sort by:

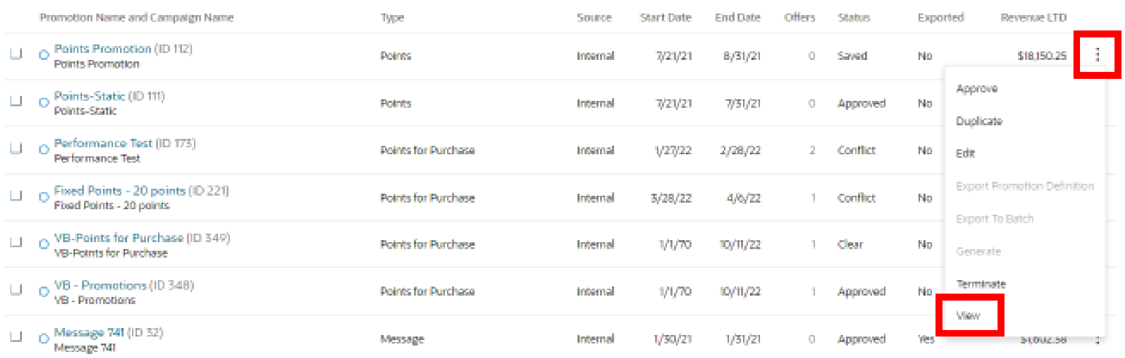
- Last Update Date
- Promotion Name
- Promotion ID
- Campaign Name
- Type
- Status
- Exported
- Revenue LTD

Promotion results can be sorted ascending or descending.

Viewing a Promotion

There are three places that a user can find the View option in order to view a Promotion:

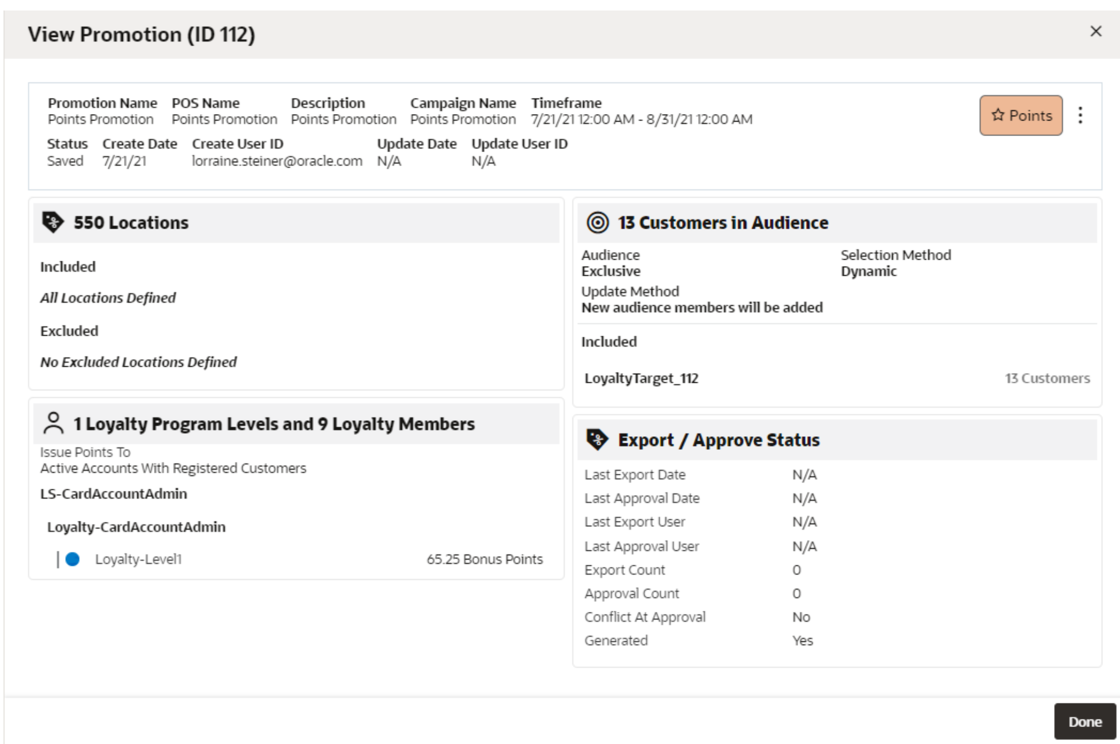
Figure 6-9 Overflow Menu



- Select **View** under the Action Menu (also known as the Overflow Menu) icon for each individual Promotion on the Promotion Advanced Search window.
- Select **View** in the Overflow Menu on each individual Promotion on the Promotion List window (which displays in the Promotion Home menu).
- Select **View** in the Overflow Menu for the individual Promotion on the Promotion Scorecard.

The View Promotion window displays:

Figure 6-10 View Promotion



The information displayed will depend upon the configuration for a Promotion.

- Display Bar

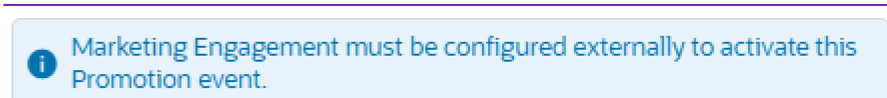
  - Promotion Name
  - POS Name
  - Description
  - Campaign Name
  - Timeframe
  - Promotion Type
  - Status
  - Create Date
  - Create User ID
  - Update Date
  - Update User ID
- Cards - In the Review panel, the individual sections are called "Cards", which display details added to some of the tabs during Promotion setup. Some of those cards may be:
  - Locations
  - Attributes
  - Franchisees
  - Offers
  - Audience
  - Budget
  - Loyalty Program Levels and Loyalty Cards

> **Note:**
>
> At any time click the Pencil icon to go into the edit mode, see Editing a Promotion for more information. You can also click the **X** icon to close the promotion.

Viewing Promotions - Marketing Engagements

Once a Marketing Event is created, it needs to be activated. The following message appears on Marketing Engagements to assist the user setting the event. The message reads: Marketing Engagement must be configured externally to activate this Promotion Event..

Figure 6-11 Trigger Event Information



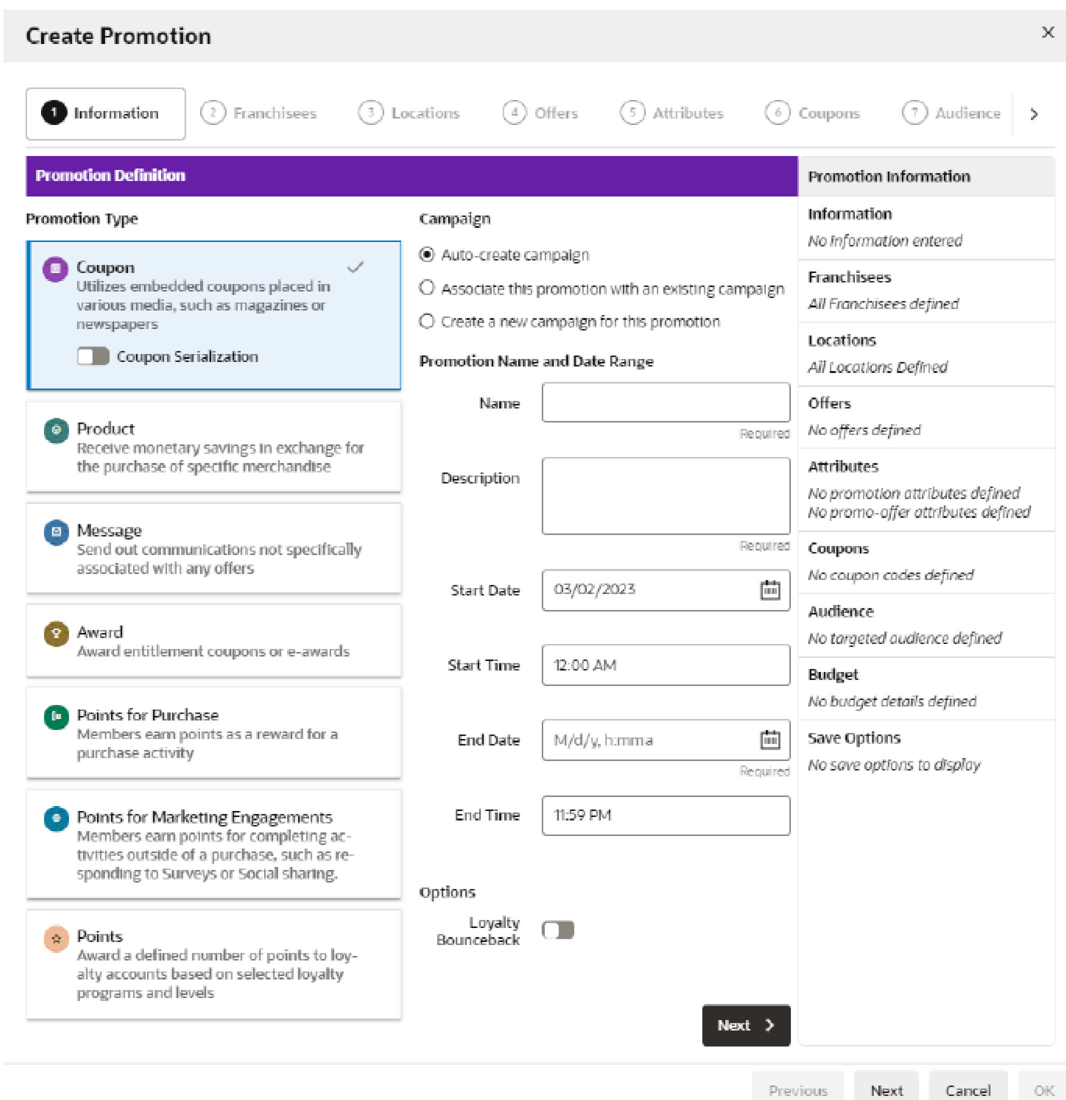
Creating a Coupon Promotion

There are a few choices available to start the process of creating a promotion. The **Create Promotion** button is available in both the Promotion Home window as well as the Promotion Search window.

> **Note:**
>
> You will need the Promotion Home role to access the Promotion Home window.

1. Click **Create Promotion**, which opens up the Promotion wizard to the Information tab.

Figure 6-12 Information Tab - Coupon



2. Select the **Promotion Type**: Coupon

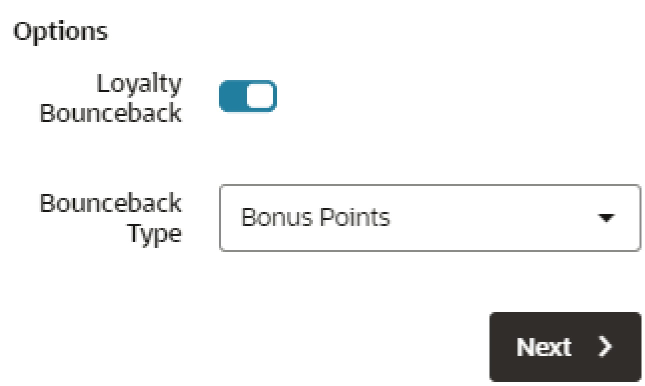
> **Note:**
>
> Contact your administrator if you do not see the Promotion Types needed for your promotion

3. There are two options for a Coupon Promotion - Serialized and Non-Serialized. The selection you make will display different options on the Coupon tab. A Serialized Coupon promotion will generate coupons, each with a unique serial number, generally for a one-time use. A Non-Serialized Coupon promotion will generate a unique coupon code for the promotion, for example, a SHOE20 may represent a code a customer can use, multiple times, to receive 20% off a shoe purchase. If you wish to create a Serialized Coupon promotion, use the Coupon Serialization switch in the Coupon type box to activate that option. This Switch is only available if the Serialized Coupon Enabled Flag configuration is set to **Yes**. See the *Oracle Retail Customer Engagement Cloud Service Implementation Guide* for more information about the Serialized Coupon Enabled Flag configuration.
4. Select one of the choices for the Campaign.
   - **Auto-create Campaign** – The campaign is automatically created and will use the same name and description from the promotion name and description.
   - **Associate this promotion with an existing campaign** – Uses existing campaigns in the system.
     – Click the list arrow and select an **existing campaign**.

     > **Note:**
     >
     > The Start Date and End Date display underneath the Existing Campaign list.

   - **Create a new campaign for this promotion** – A new campaign is created with this promotion being the first added.
5. Enter the following information:
   - Enter a **Campaign Name** (for new Campaigns only).
   - Enter a **Description** (for new Campaigns only).
   - Enter a **Name**.
   - Enter a **Description**.
   - Select a **Start Date**.
   - Select a **Start Time**.
   - Select an **End Date**.
   - Select an **End Time**.
6. **Optional** - Slide the **Loyalty Bounceback** toggle to ON to activate.

Figure 6-13 Loyalty Bounceback - Activated



- Select a **Bounceback Type**.
  - Bonus Points
  - Entitlements

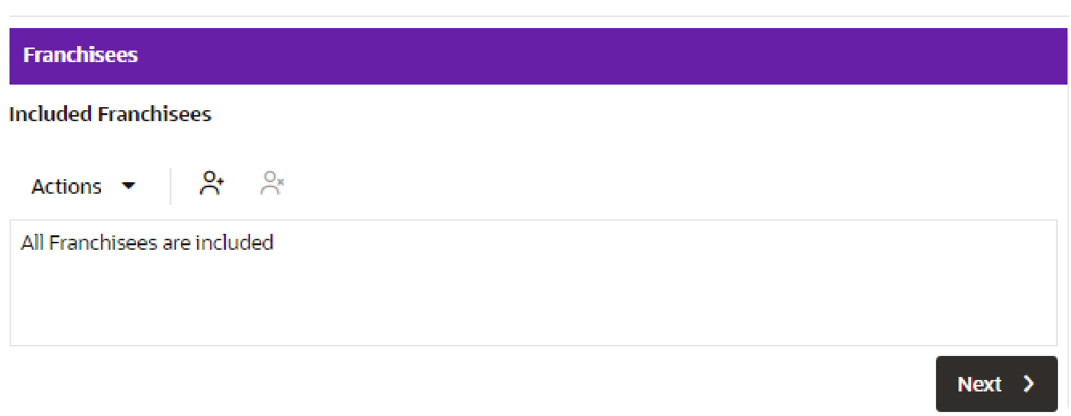
> **Note:**
>
> Loyalty Bounceback configuration occurs in **Step 12**, the **Offers** tab.

7. When finished entering the Campaign and Promotion information, click **Next** to continue to the **Franchisees** tab.

> **Note:**
>
> This tab will only display if the `EnableFranchiseSupport` configuration is enabled, and Franchisees have been created.

8. By default, all franchisees are assigned to the promotion. To make changes to those assignments, do the following:

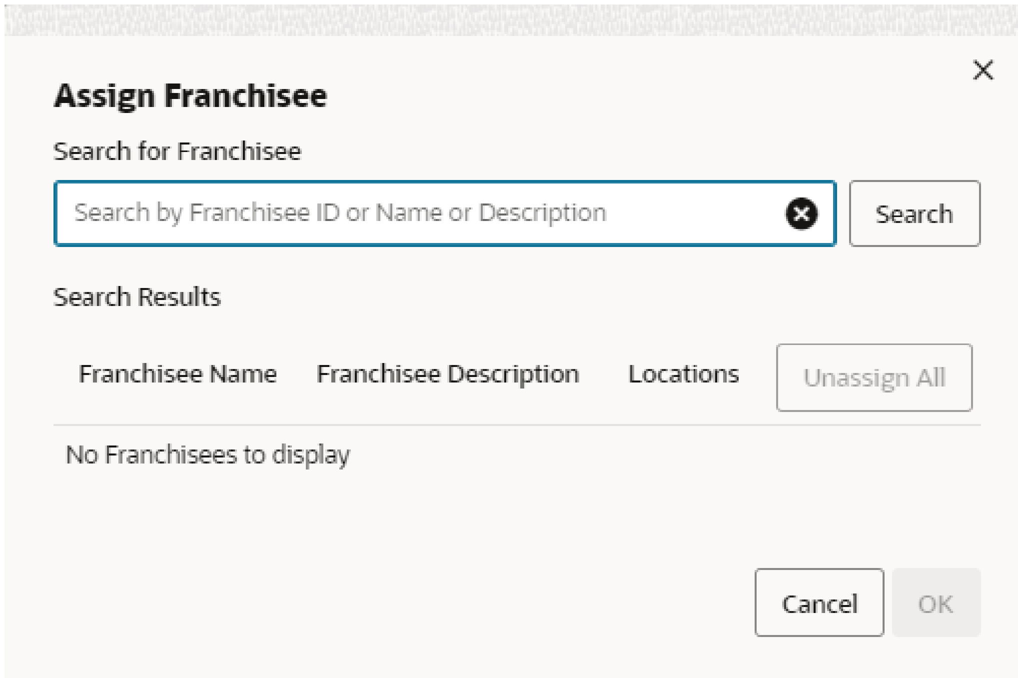
Figure 6-14 Franchisees Tab



Assigning a Franchisee

a. Click the **Actions Menu**, then, click **Assign**, or click the **Add (+)** icon. This opens the Add Franchisee window.

Figure 6-15   Assign Franchisee



b. In the Search for franchisee search box, enter part or all of the **Name**, **ID**, or **Description**, then click **Search**.

> **Note:**
>
> You can also leave blank and click Search to return all Franchisees.

c. To change the assignment from ALL (which is defaulted) click **Assign** on just the specific franchisees you wish to assign for this promotion. Only Franchisees associated with the user are displayed in the list.

d. Click **OK** to accept the changes or **Cancel** to close the window without saving.

Figure 6-16   Confirmation Notification

> **Note:**
>
> A confirmation notification appears to confirm the franchisee has been assigned.

Deleting a Franchisee

a. In the included Franchisees window, highlight the desired **row**.

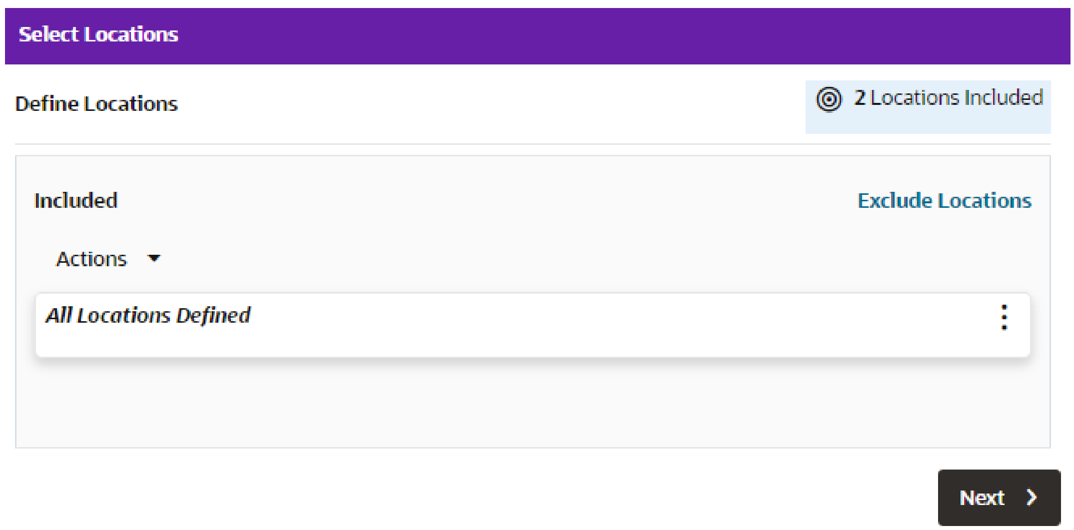
b. Click the **Action Menu**, and click **Delete**, or click the **X** icon.

> **Note:**
>
> A confirmation notification appears to confirm the franchisee has been deleted.

9. When finished entering the Franchisees information, click **Next** to continue to the **Locations** tab.

10. Enter the following for the **Locations** tab:

Figure 6-17 Locations Tab



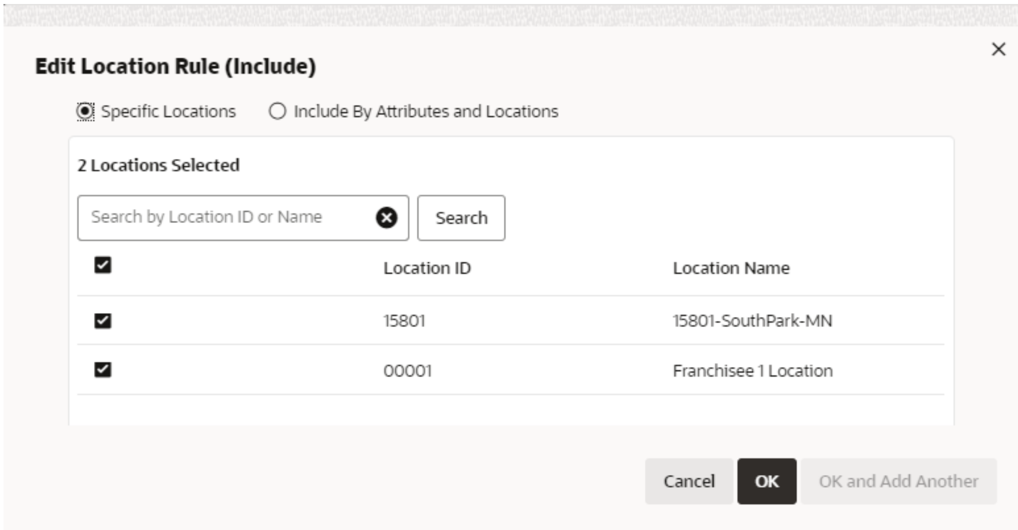
Define Locations

> **Note:**
>
> By default, **ALL** locations are added to the promotion. You can select the Overflow Menu to edit the list of locations to include.

- Included

  a. If you wish to change the Locations assigned to this Promotion, click the **Overflow Menu**, then click **Edit**. This opens the Edit Location Rule window.

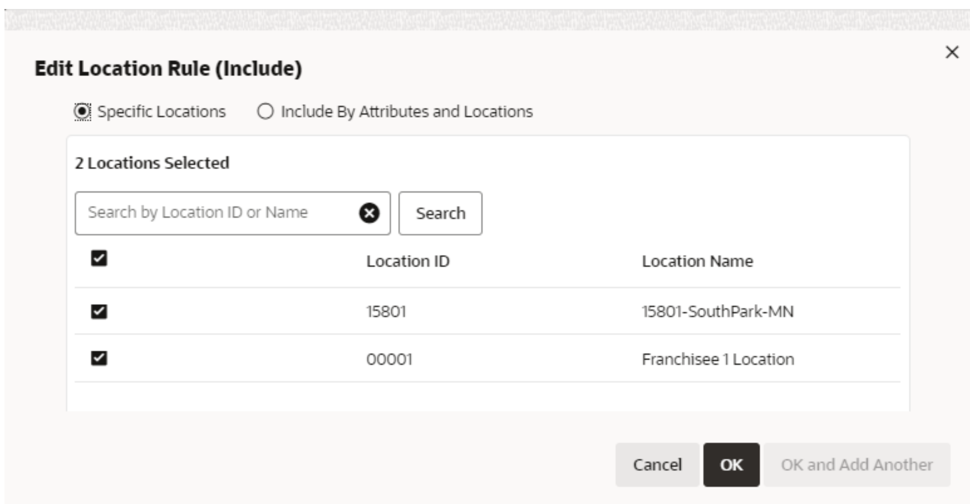
Figure 6-18 Edit Location Rule (Include)



Specific Locations

a. Click the **Specific Location** option.

Figure 6-19 Edit Location Rule (Include) - Specific Locations



> **Note:**
>
> The Location ID check box at the top of the list enables you to deselect or select all locations. If you deselect all the locations, then you can scroll through the list or search for a specific location.

b. Enter part or all of a **Location ID** or **Name**.

c. Click **Search**.

d. Click Add to select a location.

e. Click **Add** for another location means you are using the condition **AND**. Both conditions must be met.

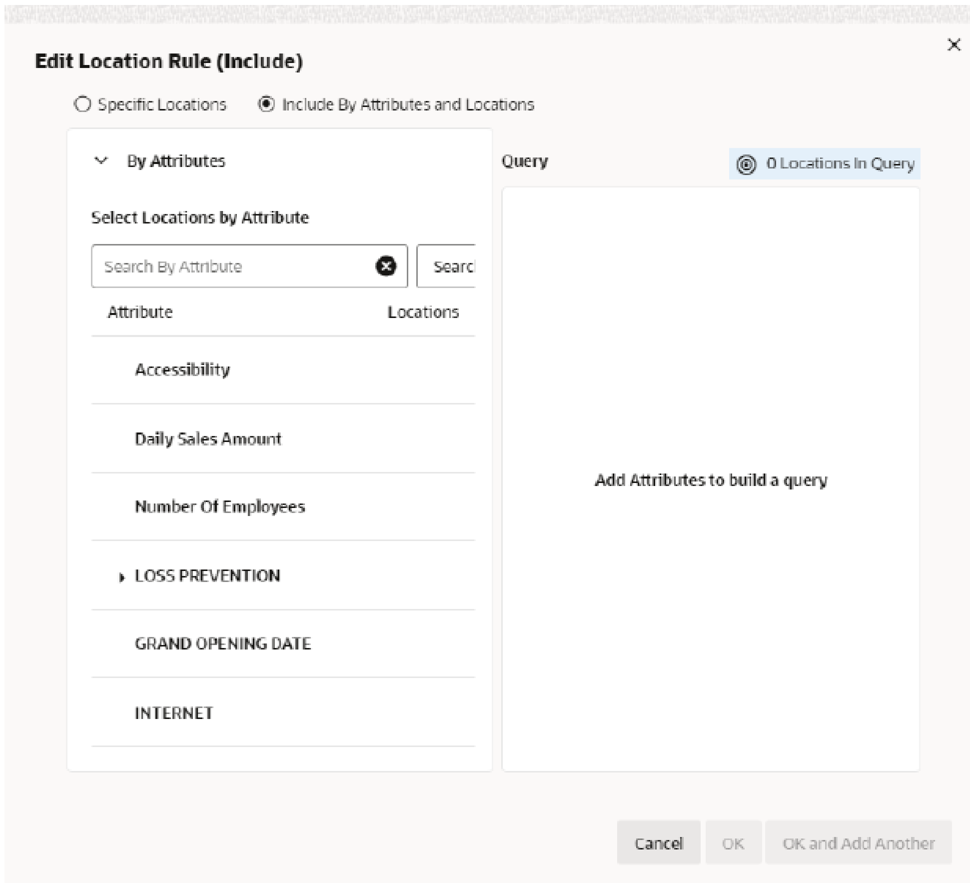
f. Click **OK and Add Another** to keep you in the same search results and use the condition **OR**. One or more of the conditions must be met when you click **Add for another location**.

g. Click **Ok** to close the window, or click **Cancel** to close the window without saving.

Include by Attributes

a. Click the **Include by Attributes** option.

Figure 6-20 Edit Location Rule (Include) - Include by Attributes



Note:

A list of attributes enables you to add one more attributes in order to create a query to select only the locations that fit the requirements.

b. Click **Add** to select an attribute. Some Location Attributes can be collapsed or expanded. They will default to collapsed to allow you to scroll thru the list easier and expand the attributes they you to add.

c. Click **Add** for another attribute means you are using the condition **AND**. Both conditions must be met.

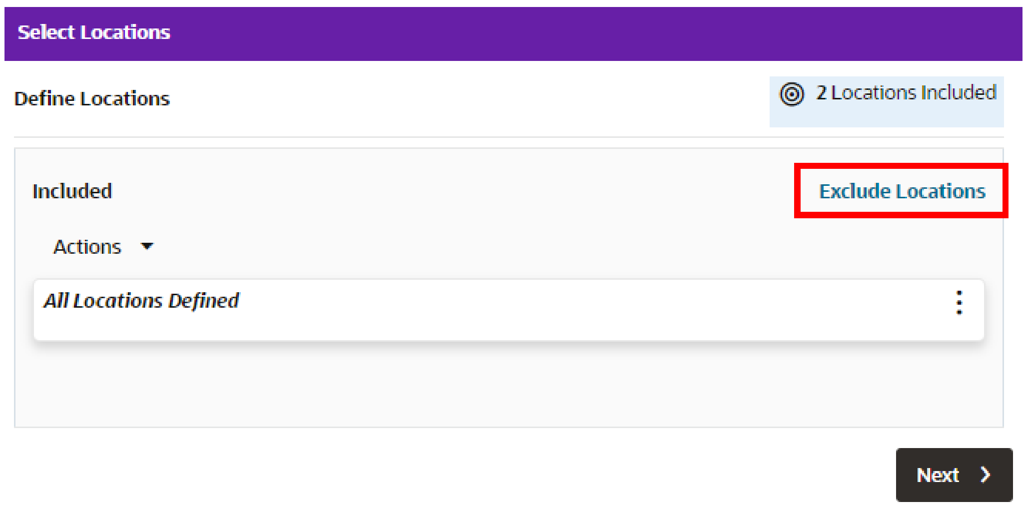
d. Click **OK and Add Another** to keep you in the same window and use the condition **OR**. One or more of the conditions must be met when you click the **Add** button for another attribute.

e. Click **OK** to close the window, or click **Cancel** to close the window without saving.

- Excluded Locations - This option allows you to select specific locations to exclude from the promotion.

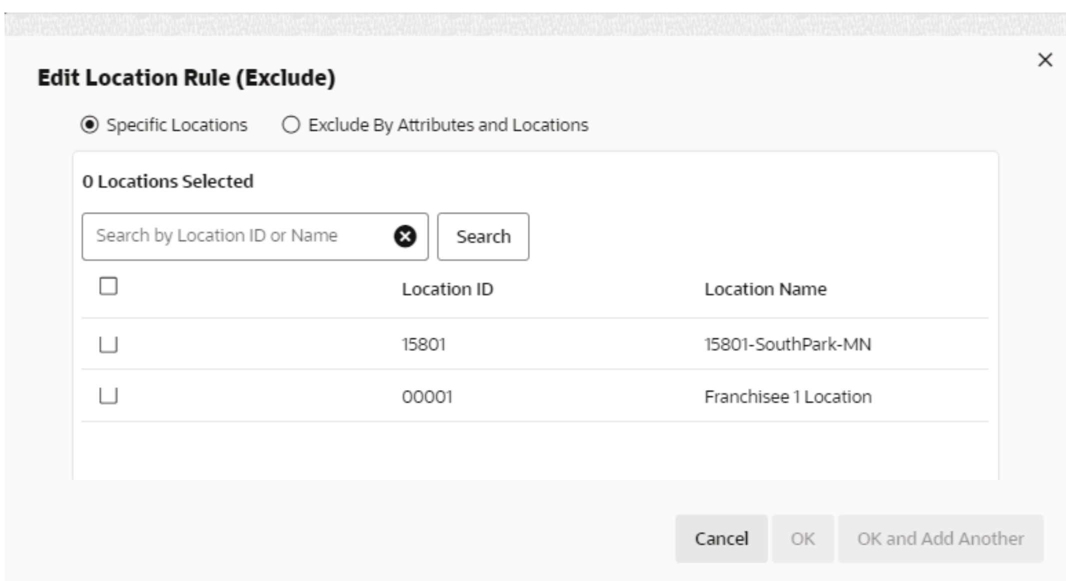
a. Click the **Exclude Locations** link.

Figure 6-21 Select Locations



Specific Locations

Figure 6-22 Edit Location Rule (Exclude) - Specific Locations



a. Click the **Specific Location** option.

> **Note:**
>
> The Location ID check box at the top of the list enables you to deselect or select all locations. If you deselect all the locations, then you can scroll through the list or search for a specific location.

b. Enter part or all of a **Location ID** or **Name**.

c. Click **Search**.

d. Click **Add** to select a location.

e. Click **Add for another location** means you are using the condition **AND**. Both conditions must be met.

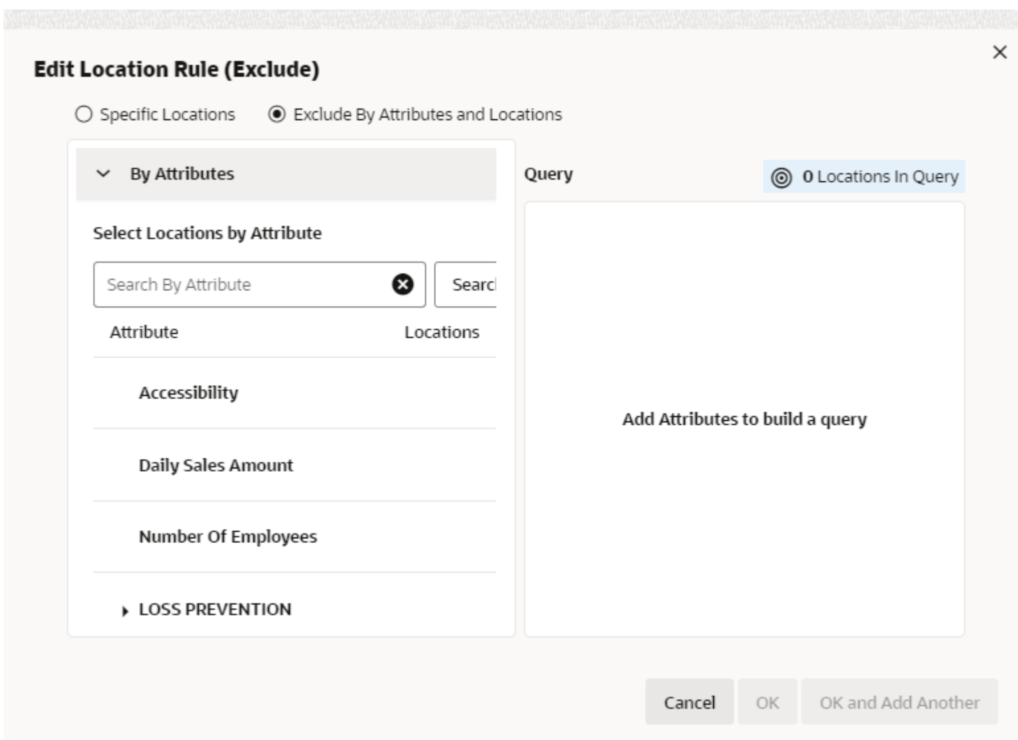
f. Click **OK and Add Another** to keep you in the same search results and use the condition **OR**. One or more of the conditions must be met when you click **Add for another location**.

g. Click **OK** to close the window, or click **Cancel** to close the window without saving.

Exclude by Attributes

a. Click the **Exclude by Attributes** option.

Figure 6-23 Edit Location Rule (Exclude) - Exclude By Attributes



b. Click **Add** to select an attribute. Some Location Attributes can be collapsed or expanded. They will default to collapsed to allow you to scroll thru the list easier and expand the attributes they you to add.

c. Click **Add for another** attribute means you are using the condition **AND**. Both conditions must be met.

d. Click **OK and Add Another** to keep you in the same window and use the condition **OR**. One or more of the conditions must be met when you click **Add** for another attribute.

e. Click **OK** to close the window, or click **Cancel** to close the window without saving.

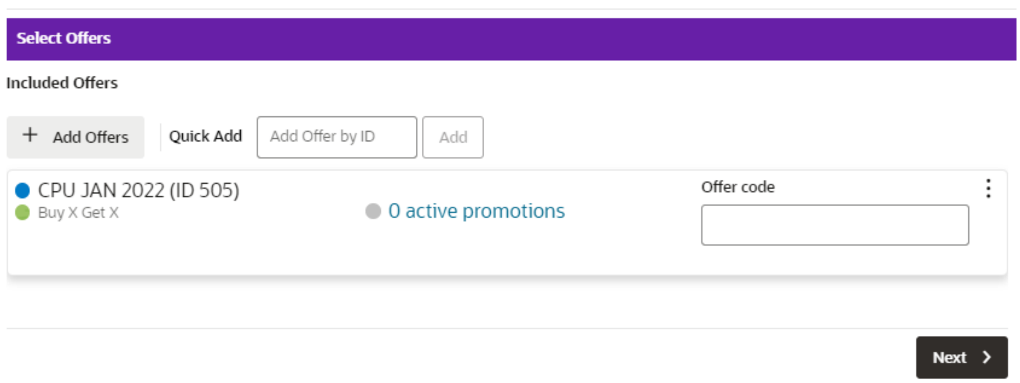
11. When finished entering Locations for the Promotion, click **Next** to continue to the **Offers** tab.

12. To begin the Offers tab, take the following actions:

There are two methods to add offers, either:

- Select the **Quick Add** option to search for a known Offer ID.
- Click **+Add Offers** for an Advanced Offer Search.

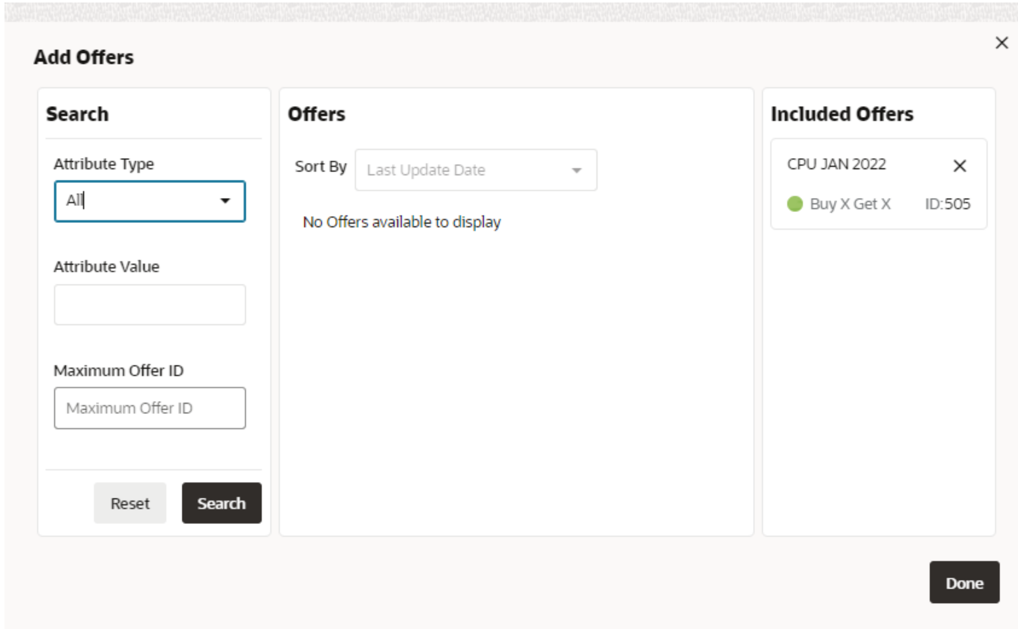
Figure 6-24   Offers Tab



> **Note:**
>
> Refer to Figure 6-24 to enter the Offer Code field. A retailer can use it to qualify or track a particular offer.

- Click **+ Add Offers**. The Add Offers window enables you to search for offers to include in the promotion. Once you receive the results of the search you can sort the results, if desired for easier selection, before adding them to the promotion. Those offers appear in the Included Offers panel.

Figure 6-25 Add Offers



- In the Search section, enter any or all of the following information:
  - **Attribute Type** – Search for an Offer by the Attribute assigned to the Offer. The default is ALL.
  - **Attributes Value -** Type-ahead search according to the Attribute Type selected.
  - **Maximum Offer ID** – Highest Offer ID number you wish to limit the search to. This will return that offer ID and all others with a lower number.
  - **Offer ID** – This Text Field searches all the Offers currently present in the application. The default is an empty field.
  - **Offer Name** – Name of the Offer.
  - **Offer Type** – Search the Offer by Offer Type (Single Select). Depending on the Parameter value set in System Configuration (Offer Types), the value is populated in the list of options. The following list shows the Possible Offer Types:

    All (Default)

    Buy X Get X

    Buy X Get Y

    Fixed Quantity/Price

    Gift with Purchase

    Kit

    Line Item Discount

    Tiered Discount

    Transaction Discount

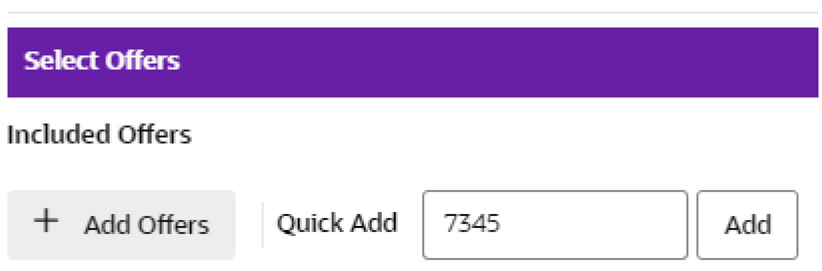
    Bounceback – Only available when creating a Bounceback Promotion.
  - **Intended Use** – The type of Promotion associated with the Offer you are searching for.

- Click **Search**.

> **Note:**
>
> Note: To retrieve all the offers in the system, select Search without entering any search criteria. All offers are returned to the Offers results section. From there, you can scroll through the list to choose which offers to add.
>
> To clear the search fields and restore default selections in the search page, click **Reset**.

- Upon selecting **Search**, the results display in the Offers section. Use the **Sort by list** to sort by the following options:
  - Last Update Date
  - Offer Name
  - Offer Type
  - Intended Use
  - Offer ID
- In the Add Offers window, you can select any of the offers in the Include Offers section and remove them by selecting the **X** in the top right corner of the Offer. Click **Add** to include the offers in the promotion.
- When finished selecting offers to add to the Promotion, select **Done**, which returns you to the Select Offers window.
- On the Select Offers window, you can select the **Remove** option from the **Overflow Menu** to remove an offer from the promotion.
- Enter the **Offer ID** in the Quick Add field and then click **Add** to also add offers to a promotion.

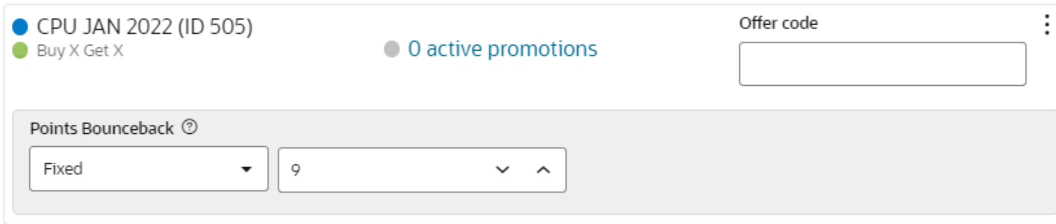
Figure 6-26 Select Offers Quick Add



> **Note:**
>
> The following two configuration options only appear when **Loyalty Bounceback** is activated in the **Information** tab.

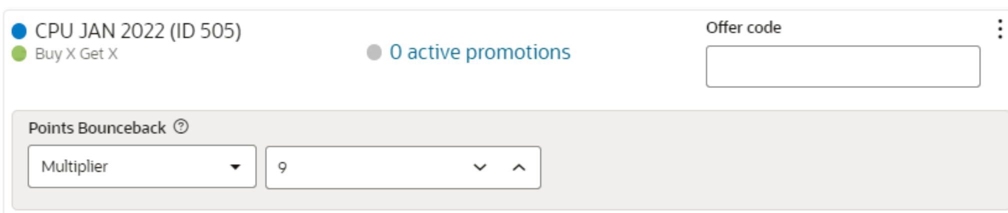
Bonus Points - Points Bounceback options appear when Bonus Points is selected in the Information tab. From the Points Bounceback drop-down list, select one of the following options:

Figure 6-27   Points Bounceback - Fixed



- **Fixed** - Identifies the amount awarded as loyalty incentive points to the user's account upon meeting the promotion requirements. Define the amount of points added by entering a value or using the up and down arrows to increase/decrease the number of points awarded.

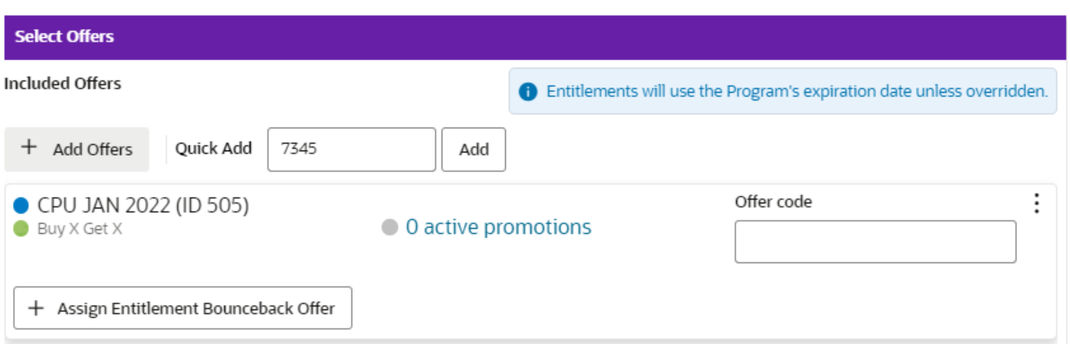
  Figure 6-28   Points Bounceback - Multiplier

- **Multiplier** - Multiplies the number provided by the user by the dollar amount of the item to award the correct Loyalty Bounceback point amount upon meeting the promotion requirements.
- **None** - No bonus points are assigned.

Entitlements - Entitlement configuration options appear when Entitlements is selected in the Information tab.

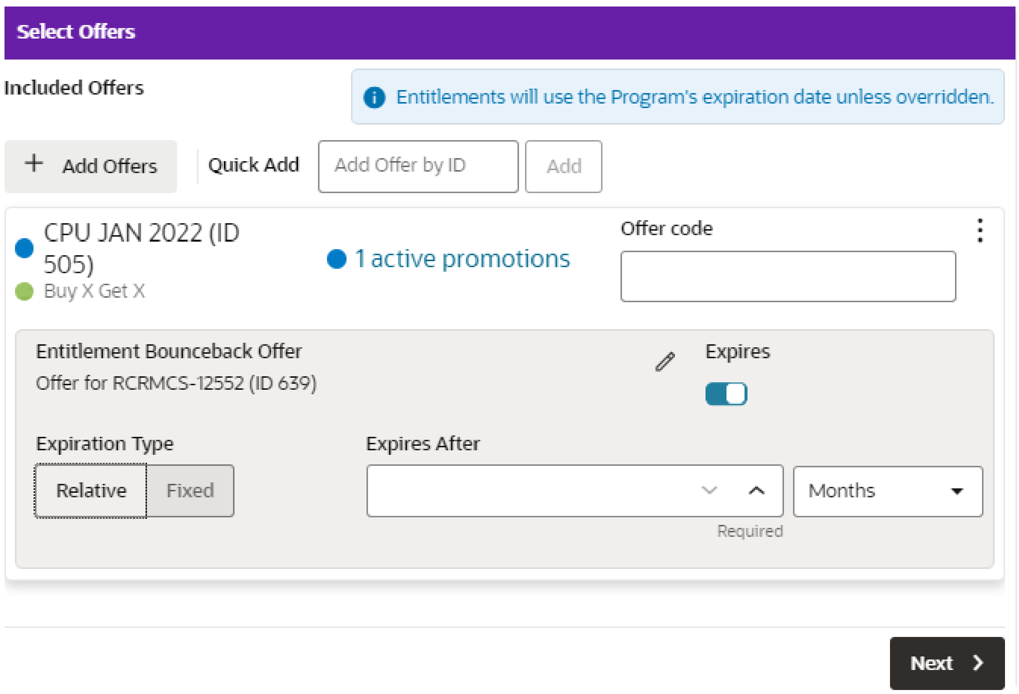
Figure 6-29   Offers Tab - Assigning Entitlements



- Click the **+ Assign Entitlement Bounceback Offer** button.
- Assign an Entitlement Offer in the same way you assigned an Offer as shown within in this step.

> **Note:**
>
> The available Intended Use type for an Entitlement Bounceback is Entitlement. All other Intended Uses are disabled.

Figure 6-30 Expiration Types (Optional)



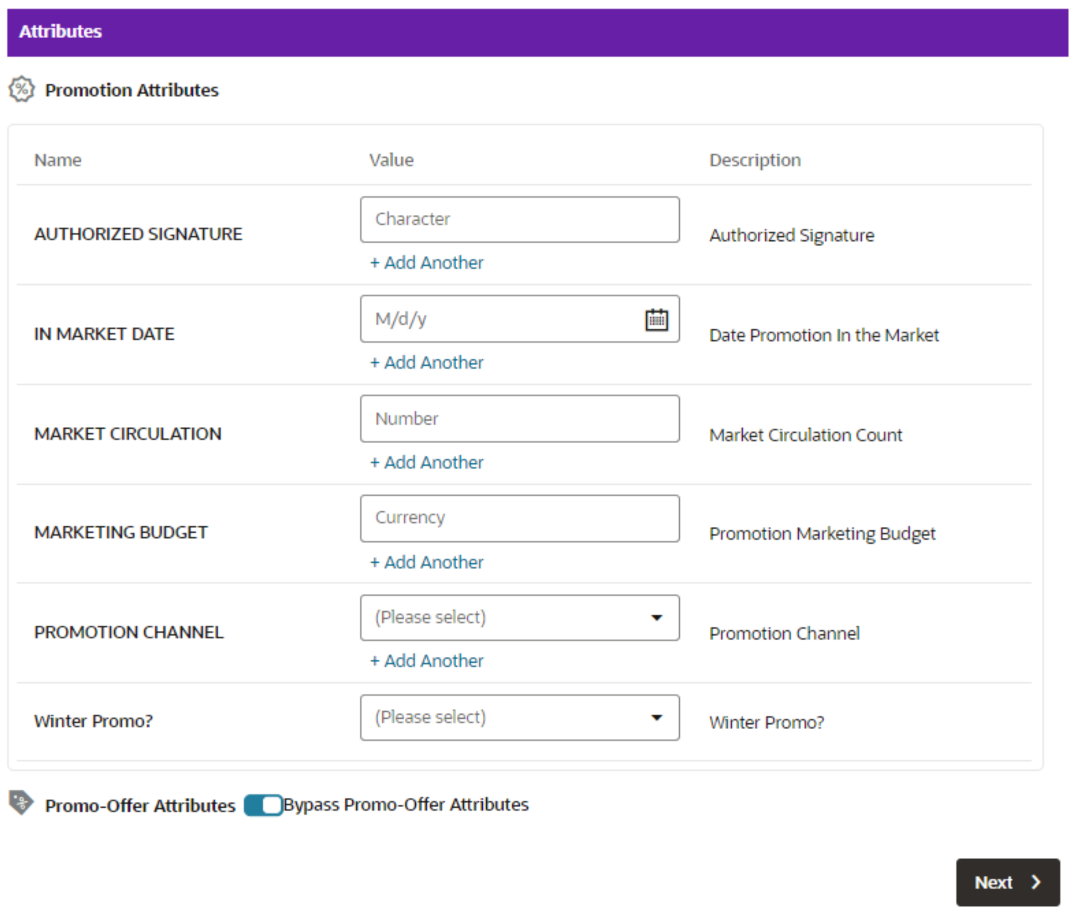
Optional: Configure the Offer Expires options. Click the **Expires** slider shown in Figure 6-30 to activate the following expiration types:

- Expiration Type: **Relative** (default)
  - Enter a **Value** or click the Up/Down arrows to **increase/decrease** the value in the **Expires After** field.
  - Click the drop-down list to indicate **Days**, **Months** (default), or **Years**.
- Expiration Type: **Fixed**
  - Click the **Start Date** field to use the Date Editor (required).
  - Click the **End Date** field to use the Date Editor (required).
- The Overflow Menu for Entitlement Bounceback Offers include the following options:
  - **Copy Bounceback Entitlement to all other Offers** - Copies the expirations rules to all other entitlement bounceback offers selected. They will take the exact same rules from the selected entitlement bounceback. Doing this will overwrite any existing bounceback details selected.

- **Remove** - Removes the offer and the bounceback entitlement offer.
- **Remove the Bounceback Entitlement** - Removes the bounceback entitlement offer only. The offer remains available to add an entitlement bounceback offer.

13. When finished entering Offers for the Promotion, click **Next** to continue to the **Attributes** tab.
14. Enter the following for the **Attributes** tab.

Figure 6-31 Select Attributes



Complete values for any Promotion Attributes and Promo-Offer Attributes you want added to the promotion. Fields marked with an asterisk are required.

- Promo-Offer Attributes Switch – Determines whether Promo-Offer attributes are used for this Promotion event:
  - **On** – The Promo-Offer Attributes switch defaults to ON, which means the step is bypassed and values for any defined Promo-Offer Attributes will not be required or added to the Promotion.
  - **Off** – When the Promo-Offer Attributes switch is set to OFF, it means that values for Promo-Offer Attributes will need to be defined and added to the Promotion.

15. When finished adding Attributes for the Promotion, click **Next**.
    - If the Promotion Type is Coupon, go to Step 16 to continue to the Coupons tab.

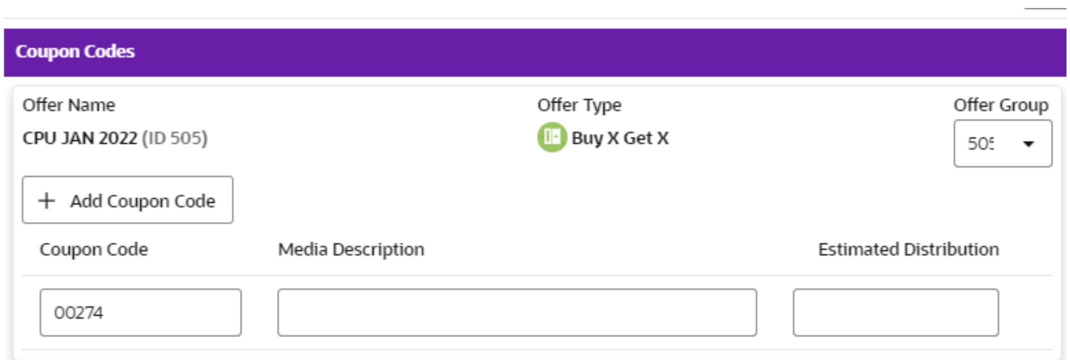
- If the Promotion Type is Product, go to Step 21 to continue to the Audience tab.
- If the Promotion Type is Message, go to Step 21 to continue to the Audience tab.
- If the Promotion Type is Award, go to Step 33 to continue to the Budget tab.

16. Enter the following for the **Coupons** Tab.
    - If you did not select the Serialized Coupon switch in Step 3, proceed to Step 17.
    - If you did select the Serialized Coupon switch in Step 3, proceed to Step 19.

    Coupon Serialization - Disabled

    The following graphic depicts the options when Coupon Serialization is **Disabled**:

    Figure 6-32 Coupon Codes Tab: Serialization - OFF



17. For each Offer that was added to the Promotion, as separate section will appear to complete these fields listed below.
    a. Coupon Code - Enter a **6 digit code** to be used for the coupon.

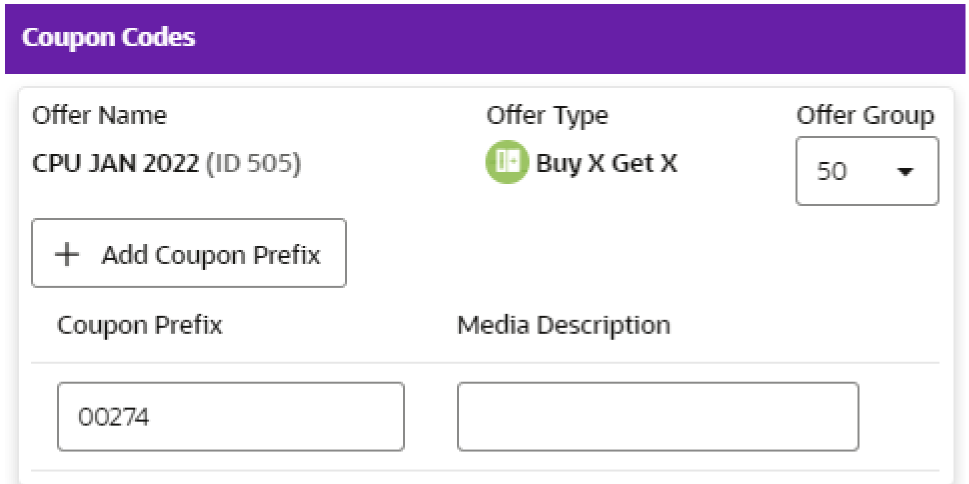
    > **Note:**
    >
    > Values may be generated systematically, provided the *PromoCouponCodeManagement* configuration is enabled. Contact your system administrator regarding configurations.

    b. Media Description – Description of the Media for the Coupon
    c. Estimated Distribution – Estimated Distribution specified for Media for the Coupon
    d. Click **+ Add Coupon Code** to add another coupon to the Offer for Promotion.
    e. To delete Coupons from an Offer, click **X** for that row.
18. When finished adding Coupon information for the Promotion, click **Next** to continue to the **Audience** tab. Proceed to Step 21.

    Coupon Serialization - Enabled

    Figure 6-33 depicts the options when Coupon Serialization is **Enabled**.

Figure 6-33 Coupon Codes Tab: Coupon Serialization - ON

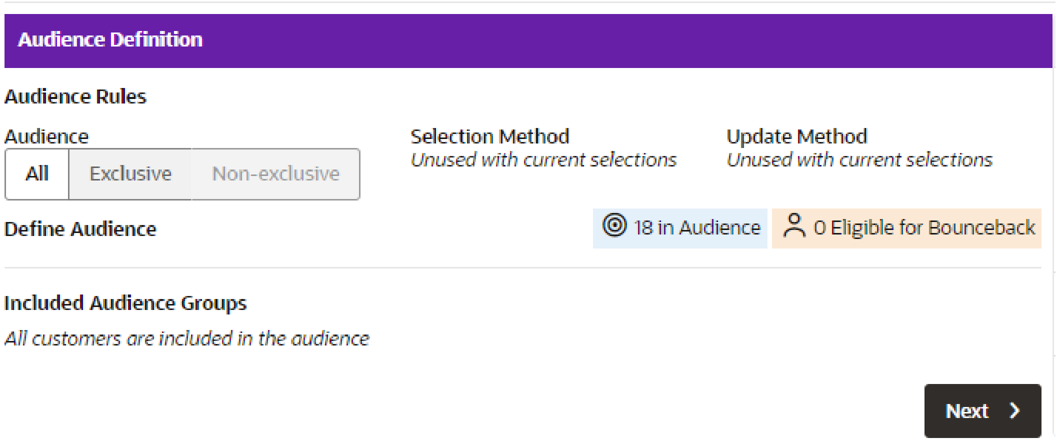


19. For each Offer that was added to the Promotion, as separate section will appear to complete these fields listed below.
    a. Coupon Prefix - Enter a **6 digit prefix** to be used for the coupon.

    > **Note:**
    >
    > Values may be generated systematically, provided the *PromoCouponCodeManagement* configuration is enabled. Contact your system administrator regarding configurations.

    b. Media Description – Description of the Media for the Coupon
    c. Click **+ Add Coupon Code** to add another coupon to the Offer for Promotion.
    d. To delete Coupons from an Offer, click **X** for that row.
20. When finished adding Coupon information for the Promotion, click **Next** to continue to the **Audience** tab.
21. Take the following actions for the Audience tab.

Figure 6-34 Audience Tab



Audience Rules – Select **All**, **Exclusive**, or **Non-Exclusive** to define the audience.

- If you select **All**, it means this promotion is open to anyone who responds to the sale – everyone who buys items on the promotion get the Offer.
- The category **All** is defaulted when you open the Audience Window. Make no changes and advance to the next tab to add all customers to be targeted for this promotion.

Exclusive Targeting - If you create an exclusive targeted promotion, this means that only the customers you've identified in your target group are eligible to receive the promotion at the point of sale.

Non-Exclusive Targeting - If you create a non-exclusive targeted promotion, all customers are eligible for the promotion.

- The Exclusive and Non-Exclusive options operate the same - the difference is only if the Promotion is exclusive to just those customers or non-exclusive for the groups selected. The Static and Dynamic selections apply to both.
  - **Static** – Only customers defined at this time are considered eligible for the promotion.
  - **Dynamic** – Dynamic can not only add customers but also remove customers that no longer apply. When Dynamic is selected, Update Method is available.

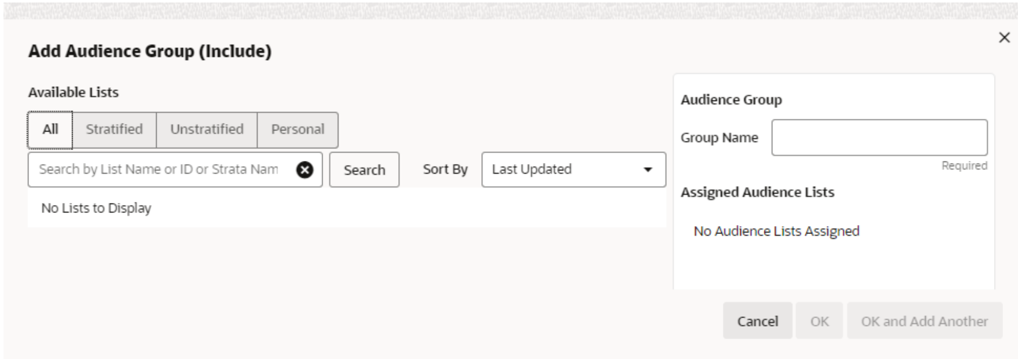
  New audience members will be added – When the Dynamic and Recurring Promotions job runs, any new customers found that meet the criteria, are added to the audience. All customers currently in the audience will remain in the audience.

  Audience members can be added and removed – When the Dynamic and Recurring Promotions job runs, any new customers found that meet the criteria, are added to the audience. Additionally, only the customers that meet the criteria will be included in the audience. If the customer is in the audience before the job runs, but no longer meets the criteria, the customer will be removed from the audience.

Define Audience - Included Audience Groups

a. Click + **Add Audience Group**.

Figure 6-35 Add Audience Group (Include)



b. Select an **Available List** type

   All - Default

   Stratified - The Customers within a Stratified list are divided into levels.

   Unstratified - Customers maintained by the user.

   Personal - Customers maintained by the user.

c. In the Search field, enter some or all of the **List Name**, **ID**, or **Strata Name**.

d. Click **Search**. The results can be sorted by using the Sort by list menu with the following options:

   Last Updated

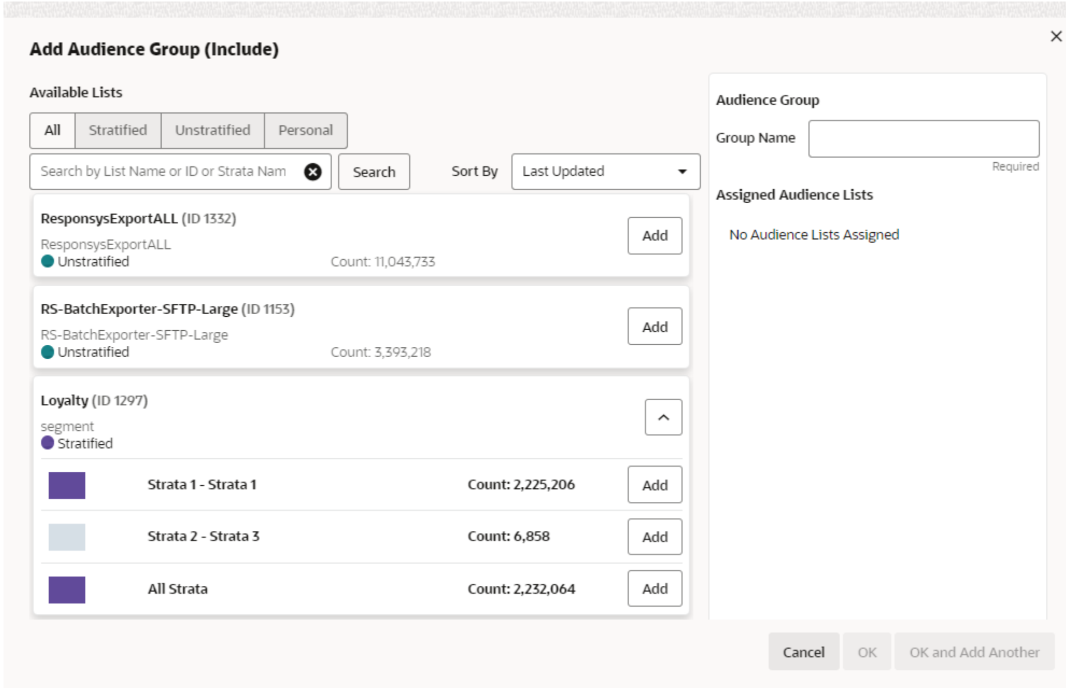
   Name

   Customer Count

e. Enter a **Group Name**.

When lists are added from the Available Lists area, they appear in the Audience Groups section of the window. The Audience Group section Group Name automatically defaults to the name of the first list added. You can change the Group Name to something more meaningful to describe the group of customers, if desired.

Figure 6-36 Add Audience Group (Include)

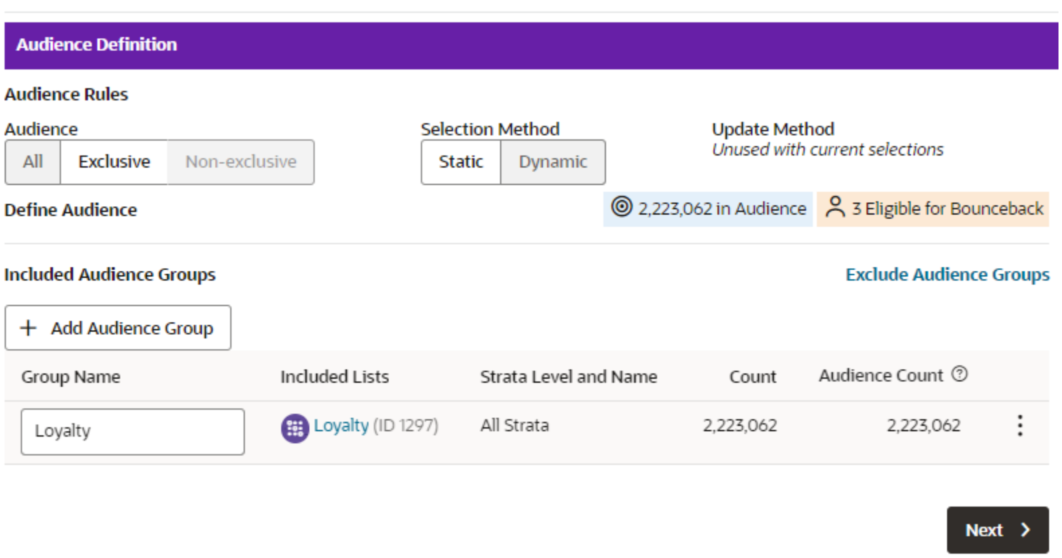


a. Click **Add** to add the selection to Assigned Audience Lists.

b. Click **Add** for another list means you are using the condition **AND**. Both conditions must be met.

c. Click **OK and Add Another** to keep you in the same window and use the condition **OR**. One or more of the conditions must be met when you click **Add** for another Audience Group.

Figure 6-37 Audience Definition



As shown in Figure 6-37 the Count is shown for each audience group. In the Audience Rules section the Audience Count is provided on the right hand side.

Columns include the following details:

- Group Name
- Included Lists
- Strata Name and Level (if applicable)
- Count
- Audience Count

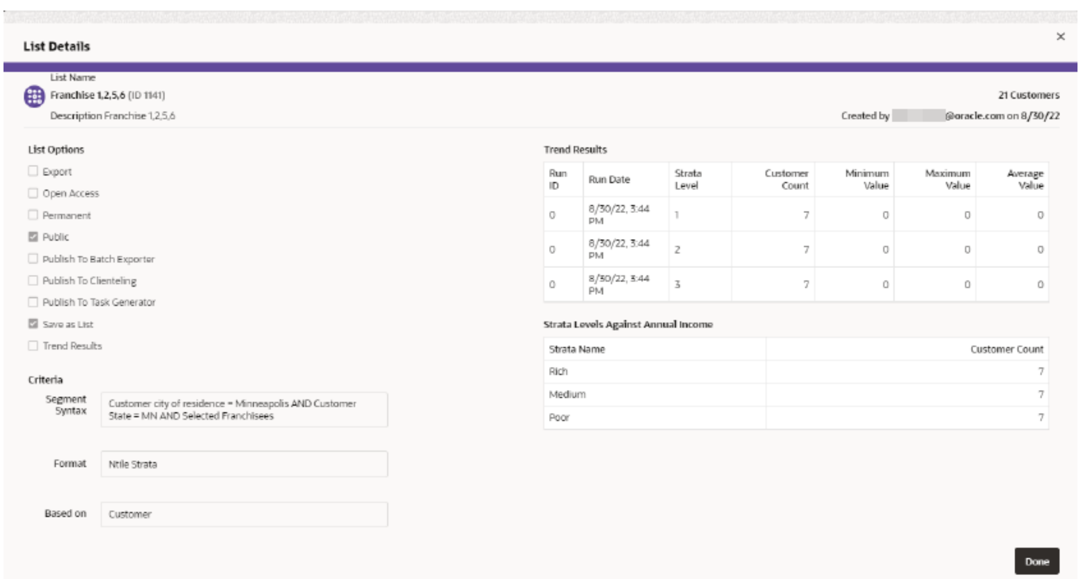
Each Group Name has an Overflow Menu Icon where you can Edit or Remove the Audience Group from the list.

The Included Lists column displays a link on that list (also known as a segment) and that link will open to the Audience List Details window.

In this window, the following sections may display, depending on the type of list and which of the options were selected when the list was created:

- List Options section
- Criteria section
- Trend Results section
- Strata Levels section
- Attributes section
- Franchisees section
- Message section
- Scheduled Jobs section

Figure 6-38 List Details



The checked List Options vary by the selections made when the list was created, and may include the following fields:

- **Export** – Indicates whether the Segment list is automatically exported after the Segment Query is run.
- **Open Access** – Indicates whether the Segment has Open Access.
- **Permanent** – Indicates whether the Segment is kept in the system, even if it meets the criteria for deletion by the housekeeping job.
- **Public** – Indicates whether the Segment is Public.
- **Publish to Batch Exporter** – Indicates whether the Segment has been made available for export to a Marketing system.
- **Publish to Clienteling** – Indicates whether the Segment has been made available to the Clienteling module.
- **Publish to Task Generator** – Indicates whether the Segment has been made available to the Task Generator Job.
- **Save as List** – Indicates whether a list of matching Customer IDs is created when the Segment is created.
- **Trend Results** – Indicates whether the results of the Segment run are kept to provide trend information about the Segment.

Figure 6-39 displays the Trend Results in a chart. A user can scroll down to see a table as shown in Figure 6-40, which for this segment shows the Strata Levels Against Customer Age and displays the strata that are shown in the graph.

Figure 6-39 List Details Trend Results - Chart

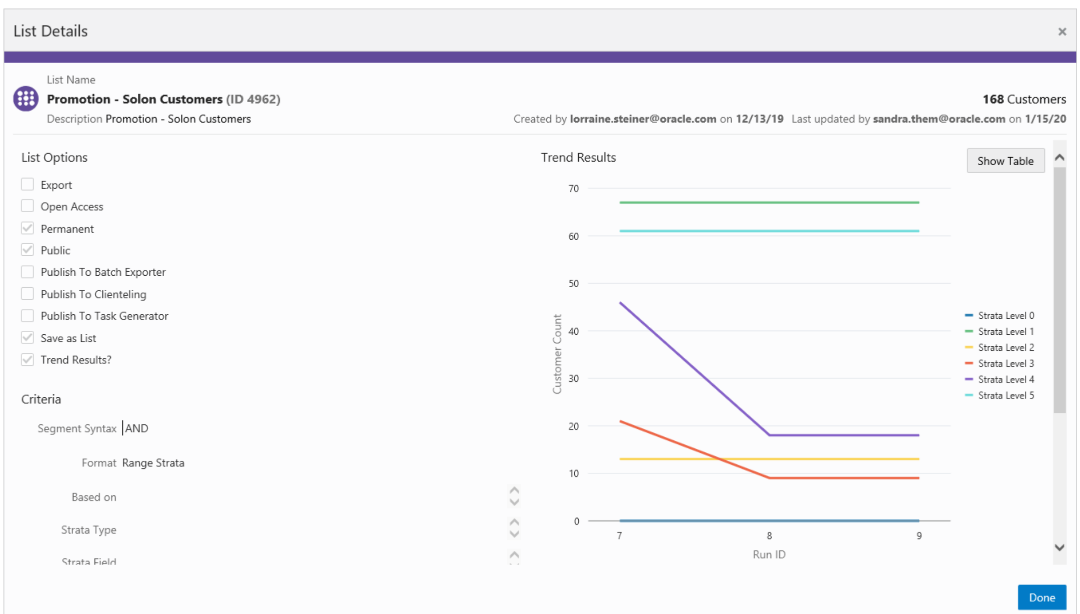


Figure 6-40 Trend Results Graph - Table

Trend Results

Show Chart

Run ID	Run Date	Strata Level	Customer Count	Minimum Value	Maximum Value	Average Value
95	1/29/21, 1:00 AM	1	99	0	0	0
95	1/29/21, 1:00 AM	2	92	0	0	0
95	1/29/21, 1:00 AM	3	93	0	0	0
94	1/27/21, 4:36 AM	1	99	0	0	0
94	1/27/21, 4:36 AM	2	92	0	0	0
94	1/27/21, 4:36 AM	3	93	0	0	0

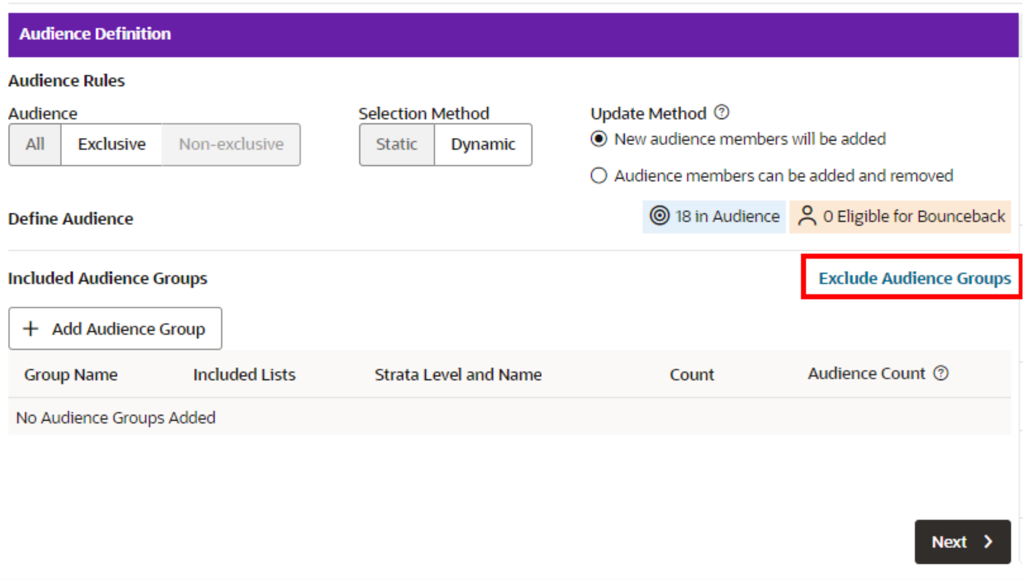
Figure 6-41 List Details Trend Results - Table

Strata Levels Against Annual Income

Strata Name	From (>=)	To (<)	Customer Count
Strata 1	0	50	2,216,204
Strata 3	51	>	6,858

- Click **Done** to close the Audience List Details window.

Figure 6-42 Audience Definition - Exclude Audience Groups

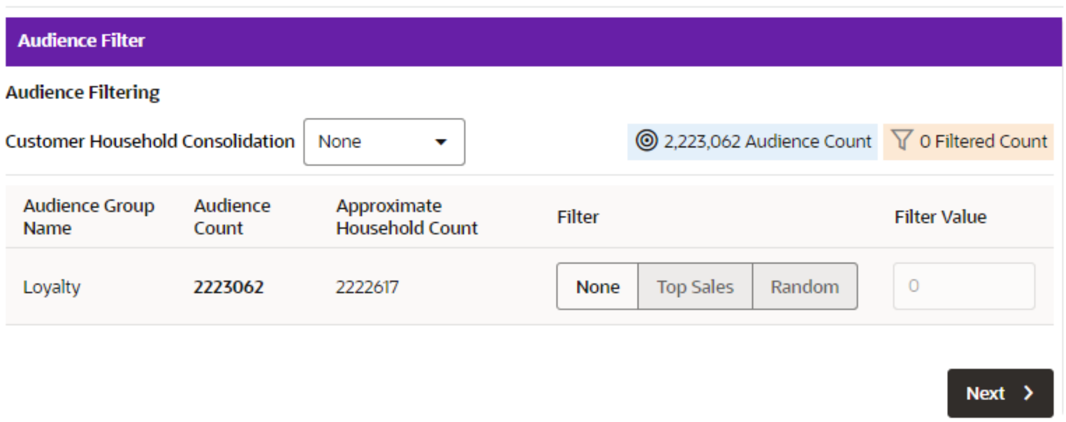


Exclude Audience Groups - If you wish to exclude certain groups of customers that may also be a part of the Included Group, you can do that by selecting the **Exclude Audience Groups** link, which opens a new section in the Audience Definition window

- Select the **Exclude Audience Groups** link.
- Click **+ Add Audience Group**.
- Select an Available List type.
- - **All** – Default group listing.
  - **Stratified** – The Customers within a Stratified list are divided into levels.
  - **Unstratified** – The Customers within an Unstratified list are not differentiated into separate groups.
  - **Personal** – User created groups.
- In the Search field, enter some or all of the **List Name**, **ID**, or **Strata Name**.
- Click **Search**.
- The results can be sorted by using the **Sort by list** menu with the following options:
  - Last Updated
  - Name
  - Customer Count
- Enter a **Group Name**.
- Click **Add** to add the selection Assigned Audience Lists.
- Click **Add** for another list means you are using the condition **AND**. Both conditions must be met.
- Click **OK and Add Another** to keep you in the same window and use the condition **OR**. One or more of the conditions must be met when you click **Add** for another Audience Group.

22. When finished entering all Audience Groups for the Promotion, click **Next**.
    - If the Selection Method selected in **Step 21**, is Static, continue to the next tab, the **Filtering Audience** tab.
    - If the Selection Method selected in **Step 21,** is Dynamic, continue to **Step 22**, the **Control Groups** tab.
23. Enter the following for the **Filtering Audience** tab.

Figure 6-43 Filtering Audience Tab

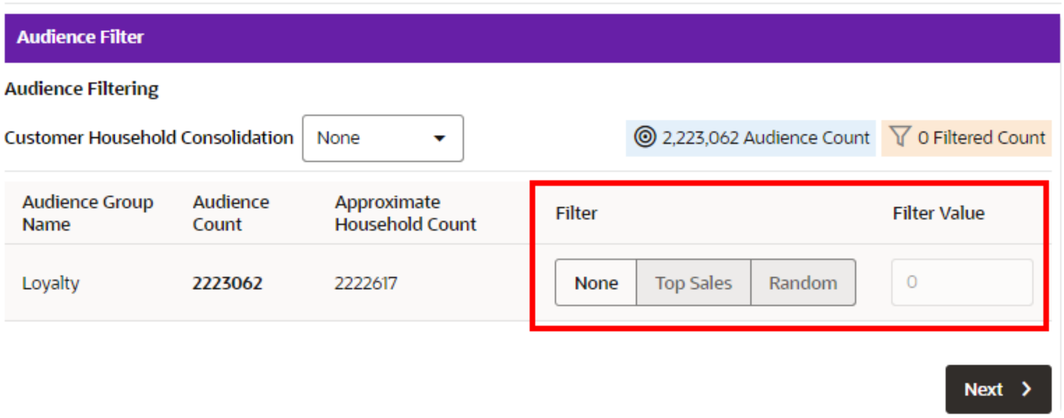


Use the **Customer Household Consolidation Selection Menu** to indicate whether the Promotion will use household consolidation, and the rule for determining the Customer who is the head of household.

- **None** – Do not perform household filtering.
- **LT Sales** – Select head of household based on amount purchased over the lifetime of their account.
- **LT Transaction Count** – Select head of household based on lifetime number of transactions.
- **Last Transaction Date** – Select head of household based on the Customer who performed the most recent transaction.
- **Customer Attributes** – Select head of household based on the Customer's numeric attributes.

Select the **Filter Type** for each Audience:

Figure 6-44 Select Desired Filtering

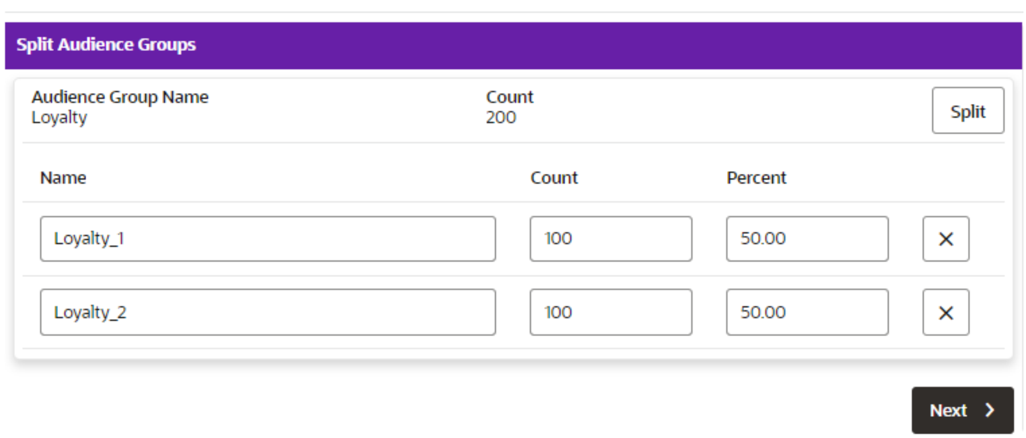


- **None** - [DEFAULT] All Customers in the Audience Group are eligible.
- **Top Sales** - Customers from the Audience Group will be chosen for eligibility by the greatest total amount of purchases.
- **Random** - Customers from the Audience Group will be chosen randomly for eligibility.

Enter a **filter value** to indicate the number of customers eligible for the promotion.

24. When finished entering any household filtering for the Audience Groups for the Promotion, click **Next** to continue to the **Split Audience** tab.
25. In the Split Audience tab, filtered audiences can, optionally, be split into smaller, separate audiences. If desired, create splits for the filtered audiences on the promotion.
    - Click **Split**.

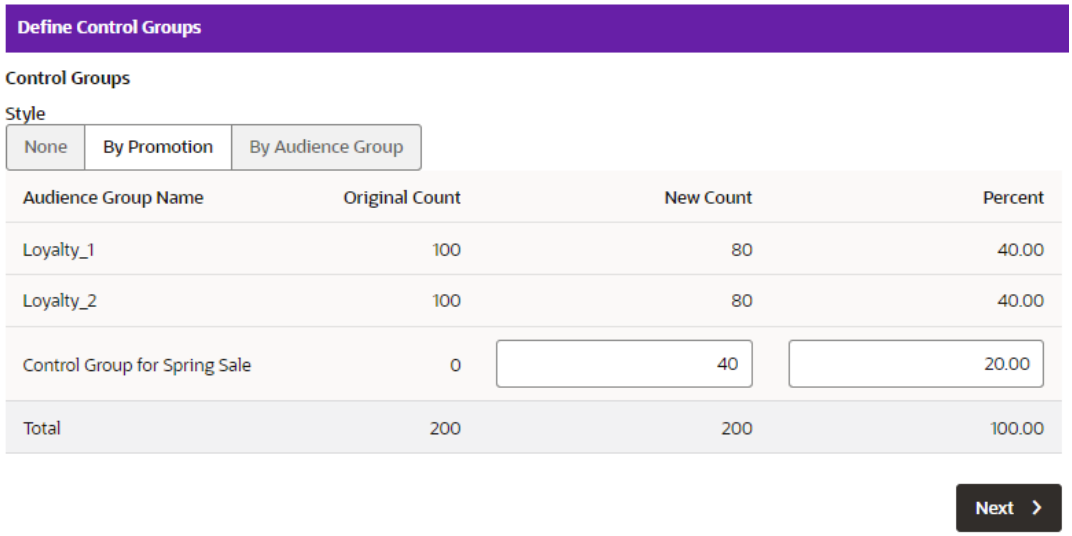
    Figure 6-45 Split Audience Groups

    - The Split Name field is automatically populated from the name of the Audience Group Name. If desired, you can change the name of the splits in this step.
    - Select **Split** to automatically divide the Audience Group into equal portions and percentages. If you desire different portions or percentages for the splits, enter either a count or a percentage, and the corresponding field will update.
26. When finished entering any Audience Group splits for the Promotion, click **Next** to continue to the **Control Groups** tab.

27. Enter the following information for the **Control Groups** tab.

Figure 6-46 Define Control Groups

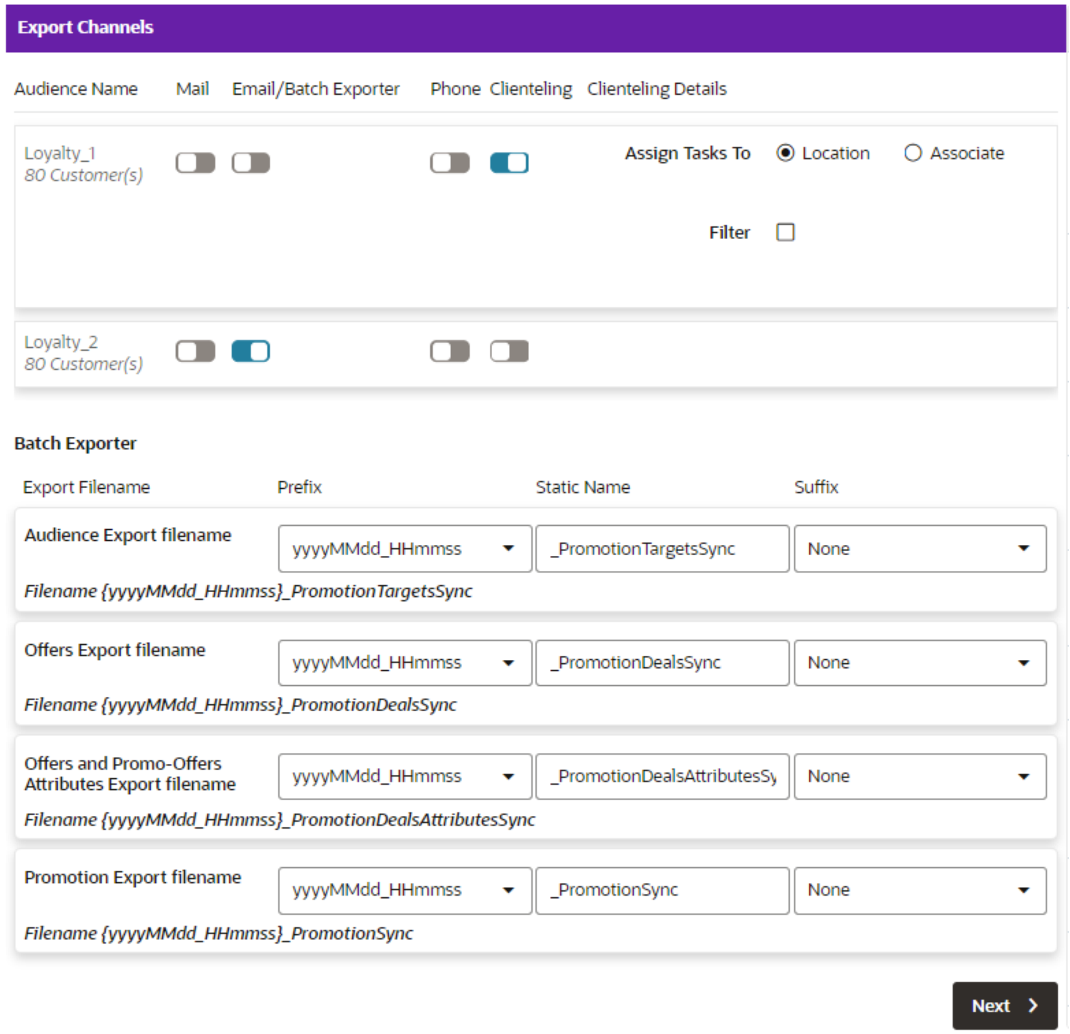


The control group is a statistically identical group that doesn't receive the offer. Following the promotional period, the results of the two groups are compared and you can determine if the offer generated incremental revenue. Options include:

- **None** – No Control Group
- **By Promotion** – Enter either a New Count or Percent. The corresponding field will update automatically to determine the size of the control group.
- **By Audience Group** – Enter either a Control Group count or percentage for each split created earlier. The corresponding field will update automatically.

28. When finished entering any Control Groups for the Promotion, click **Next** to continue to the **Export Channels** tab.
29. Enter the following information for the **Export Channels** tab. The options include:

Figure 6-47   Export Channels Tab



Mail - Determines whether the Customers in the Split/Control Group will be contacted by Mail.

EMail / Batch Exporter - Determines whether the Customers in the Split/Control Group will be contacted by Email.

> **Note:**
>
> The system configuration setting *SupportedBatchExporters* determines if the Batch Exporter section is displayed.

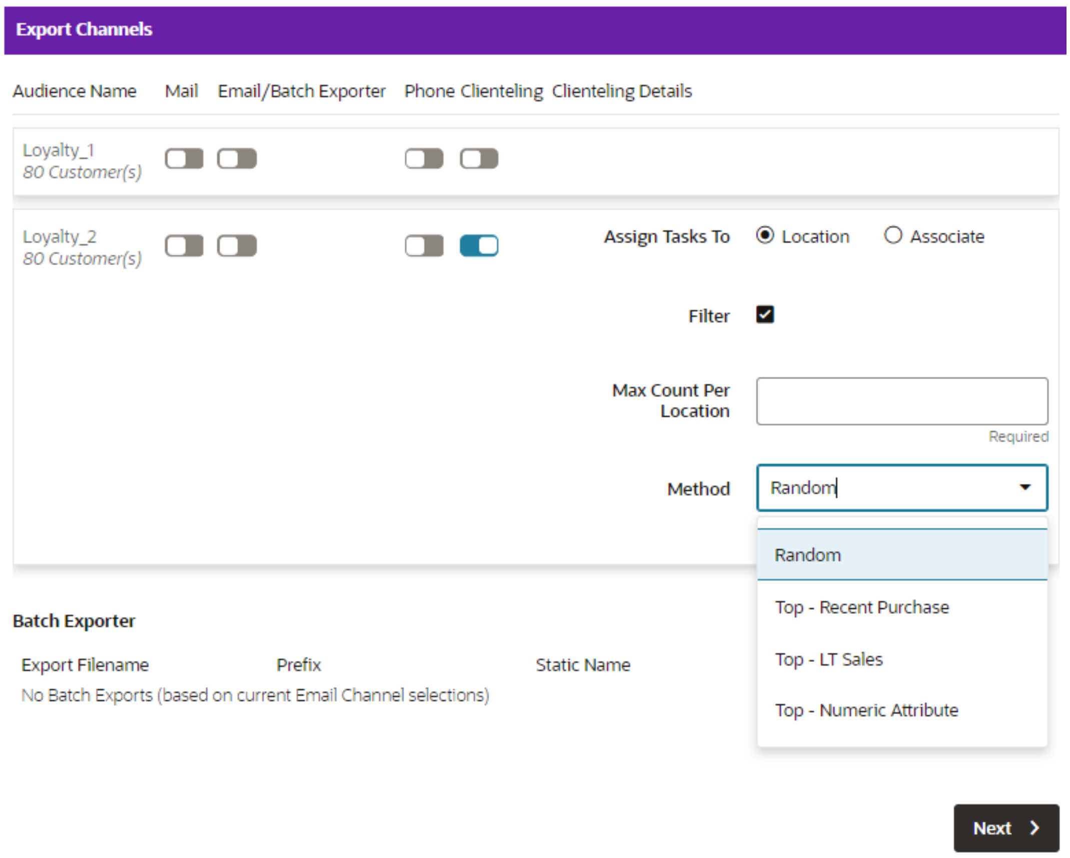
- Export Filename – Name of the file.
- Prefix – Indicates the format of the datetime stamp used as a prefix the filename. Optional. Possible settings are yyyyMMdd_HHmmss, yyyy-MMdd_HHmmss, or none.
- Static Name – The identifying filename.

- Suffix – Indicates the format of the datetime stamp used as a suffix the filename. Optional. Possible settings are yyyyMMdd_HHmmss, yyyy-MMdd_HHmmss, or none.
- Filename – Displays an example of the export file name with the prefix and suffix format, if any.

Phone - Determines whether the Customers are contacted by phone.

Clienteling – When the Clienteling switch is turned on, tasks will be created based on the assigned associates or locations for the defined target audience when the promotion is generated.

Figure 6-48 Clienteling Details



Assign Tasks to:

- **Location Channel** – Tasks are assigned to a Location.
- **Associate Channel** – Tasks are assigned to an associate in a location.

The following fields are enabled if the Filter option is selected:

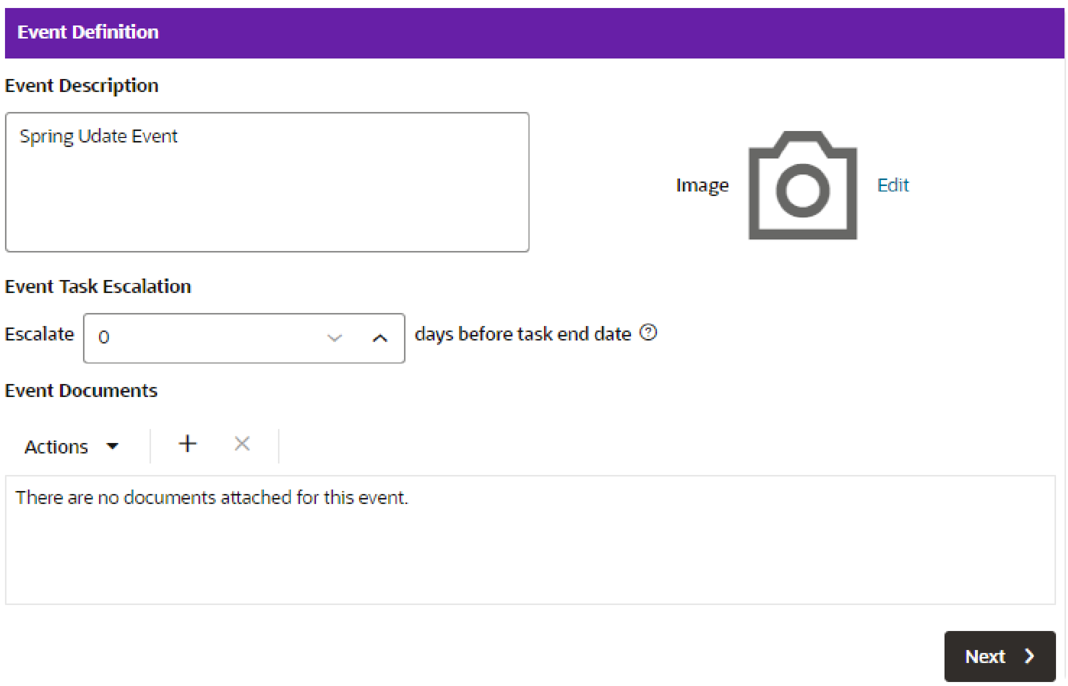
- **Max Count Per <type>** - Determines the maximum number of target Customers that will be contacted through the channel.
- **Method** - Method used to select the Customers contacted. Options include:
  - **Random** - Select Customers Randomly (Default).
  - **Top - Recent Purchase** - Filter the Customers based on the most recent purchases.

- **Top - LT Sales** - Filter the Customers based on the largest amount purchased over the lifetime of their account.
- **Top - Numeric Attribute** - Filter the Customers based on the highest attribute value for a selected numeric attribute. If this option is selected, an additional Channel Filter option, Attribute, displays. Attribute is the numeric attribute used to determine the customers contacted

30. When finished entering any Export Channels for the Promotion, click **Next** to continue to the **Event Definition** tab.
31. Enter the following information on the Event Definition tab.

> **Note:**
>
> The Event Definition Tab displays only when the Promotion uses the Clienteling Channel.

Figure 6-49 Event Definitions Tab



Enter a **description** of the Event in the Event Description field (required).

Select the **Edit** option to add an image to the Event.

a. Perform one of the following actions:

   Click **Drop a new image here or click to upload** to add the image and continue to Step 31.b.

   Enter a **URL** in **Or Via URL** and click **Upload** and continue to Step 31.b.

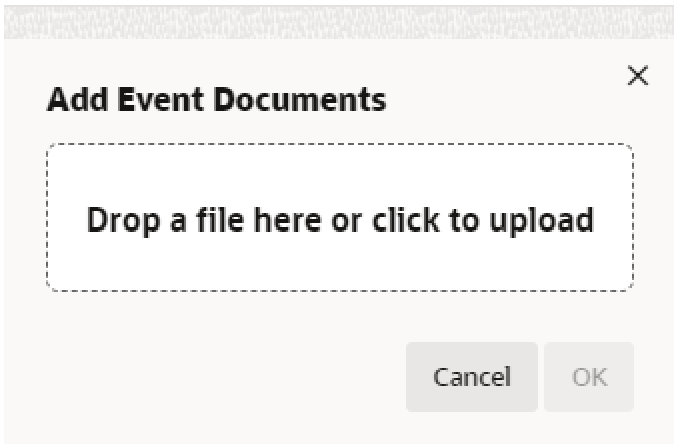
   Click **Remove Image** to remove the image and continue to Step 31.b.

b. Click **Done** to save the changes and close the window, or click **Cancel** to close the window without saving any changes.

Event Task Escalation – This option will flag an Event Task for the promotion as high priority on the Day Planner Task panel based on the number days before the end date of the promotion event task.

Event Documents – Click the Action Menu, and click Add, or click the Add icon (+) to open the Add Event Documents window.

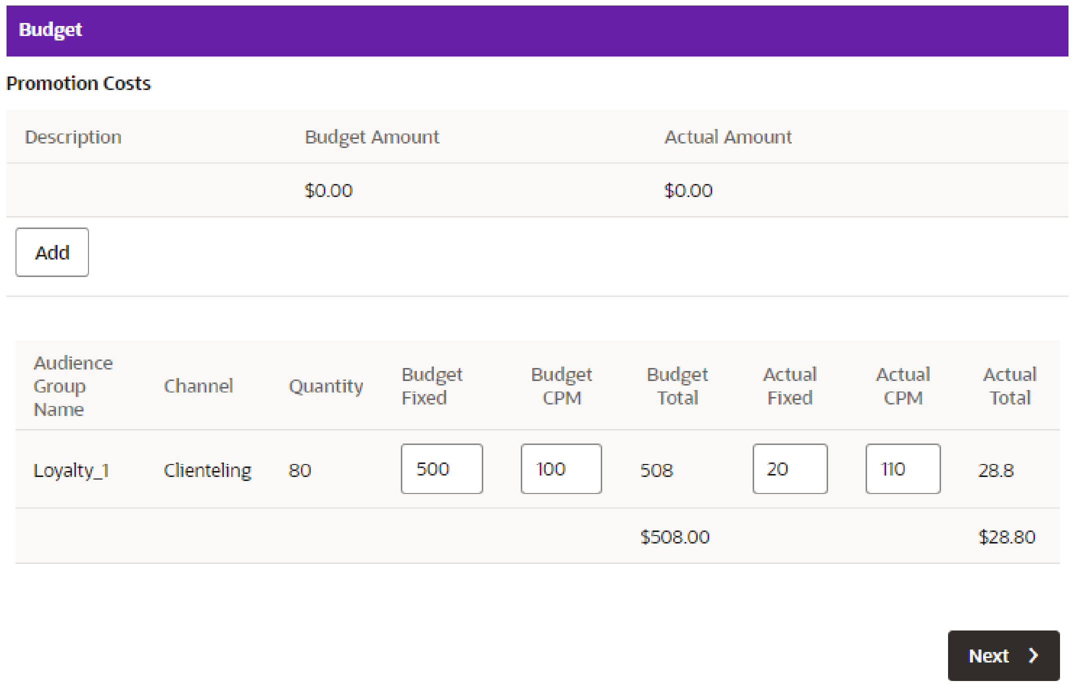
Figure 6-50 Add Event Documents



- Use the **Drop a file here or click to upload area** to add an event document.
- Click **OK** to save the changes and close the window, or click **Cancel** to close the window without saving any changes.

32. When finished entering any Event Definitions for the Promotion, click **Next** to continue to the **Budget** tab.
33. Enter the following information on the **Budget** tab.

Figure 6-51 Budget Tab



a. Click **Add** to enter the Promotion Costs. Enter values in any field is optional.

b. Enter a **Description** of the cost item.

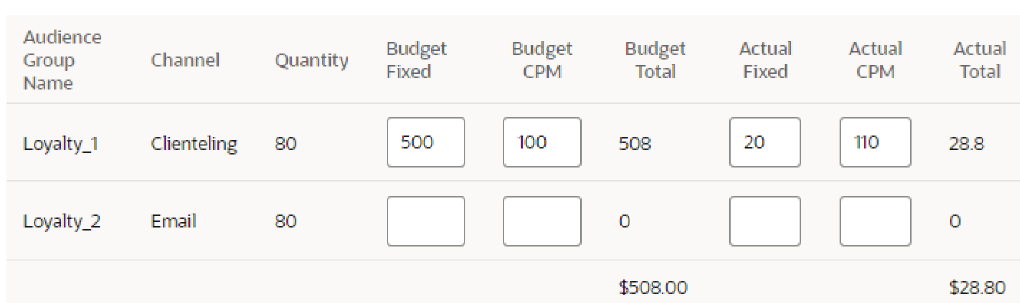
c. Enter the **budgeted amount** for the Promotion in the Budget Amount field.

d. Enter the **actual amount** for the Promotion in the Actual Amount field.

e. Click **Add** if you wish to enter another budget line for the promotion, then follow **steps a-d** to complete the fields.

   If Export Channels were selected for the audience group, the Audience Groups Costs section appears. Entering values in any field is optional.

   Figure 6-52 Audience Group Costs



f. In the Budget-Fixed field, enter the **fixed cost budgeted** for the audience.

g. In the Budget-CPM field, enter the **cost budgeted** for the Channel for each 1,000 Customers.

h. In the Actual-Fixed field, enter the **actual fixed cost** of the Channel.

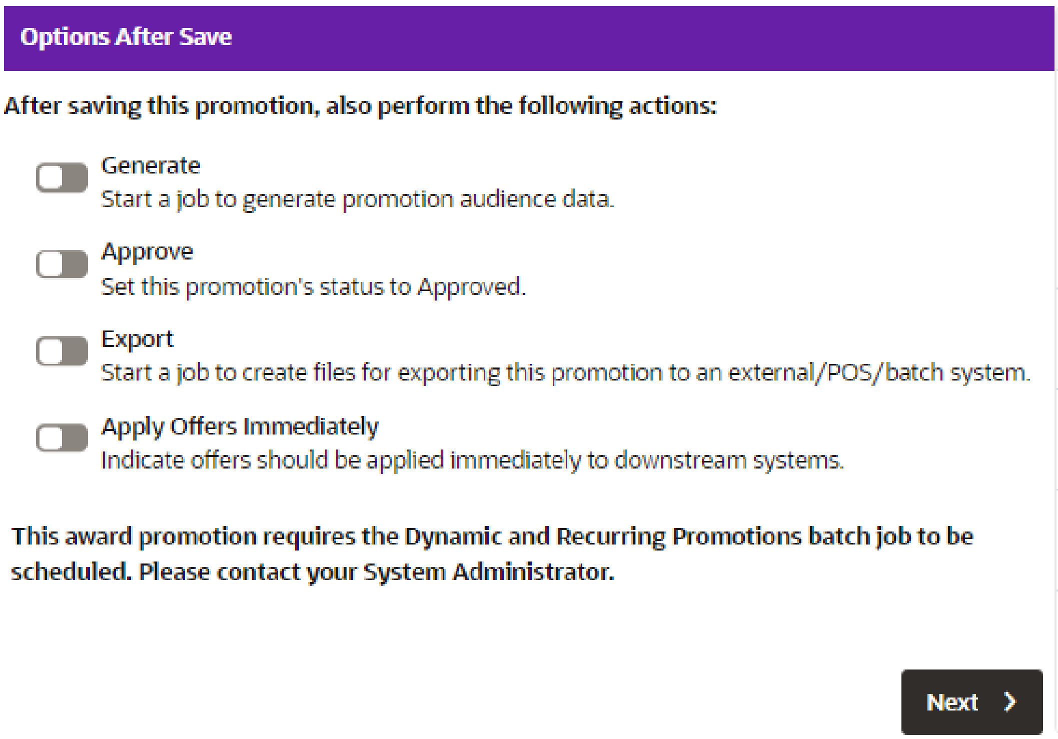
i. In the Actual-CPM field, enter the **actual cost** of the Channel for each 1,000 Customers.

j. Repeat **steps f-i** for each Target Channel in the Promotion.

34. When finished entering any Budget Costs for the Promotion, click **Next** to continue to the **Save Options** tab.

35. Enter the following information in the **Save Options** tab. You can enter more than one choice.

Figure 6-53 Options After Save Tab



- Generate – Start a job to generate promotion audience data.
- Approve – Set this promotion's status to Approved.
- Export – Start a job to create files for exporting this promotion to an external/POS/ batch system. This option automatically approves the Promotion.
- Apply Offers Immediately – Indicates that offers should be applied immediately to downstream systems. This option is configurable.
- Dynamic Promotion Options – Select one of the two export options for processing when using the Dynamic selection method on the Audience tab.

> **Note:**
>
> Depending on the type of promotion that you created, different Options After Save are available.

36. When finished entering any Save Options for the Promotion, click **Next**.
    - If the Promotion Type is Coupon go to Step 37 to continue to the Coupon Type Promotion Review tab.
    - If the Promotion Type is Product, go to Step 7 to continue in the Creating a Product Promotion Review tab.
    - If the Promotion Type is Message, go to Step 6 to continue in the Creating a Message Promotion Review tab.
    - If the Promotion Type is Award, go to Step 8 to continue in the Creating an Award Promotion Review tab.
37. The **Review** tab displays the key elements in the Promotion Setup.

Figure 6-54 Review Tab

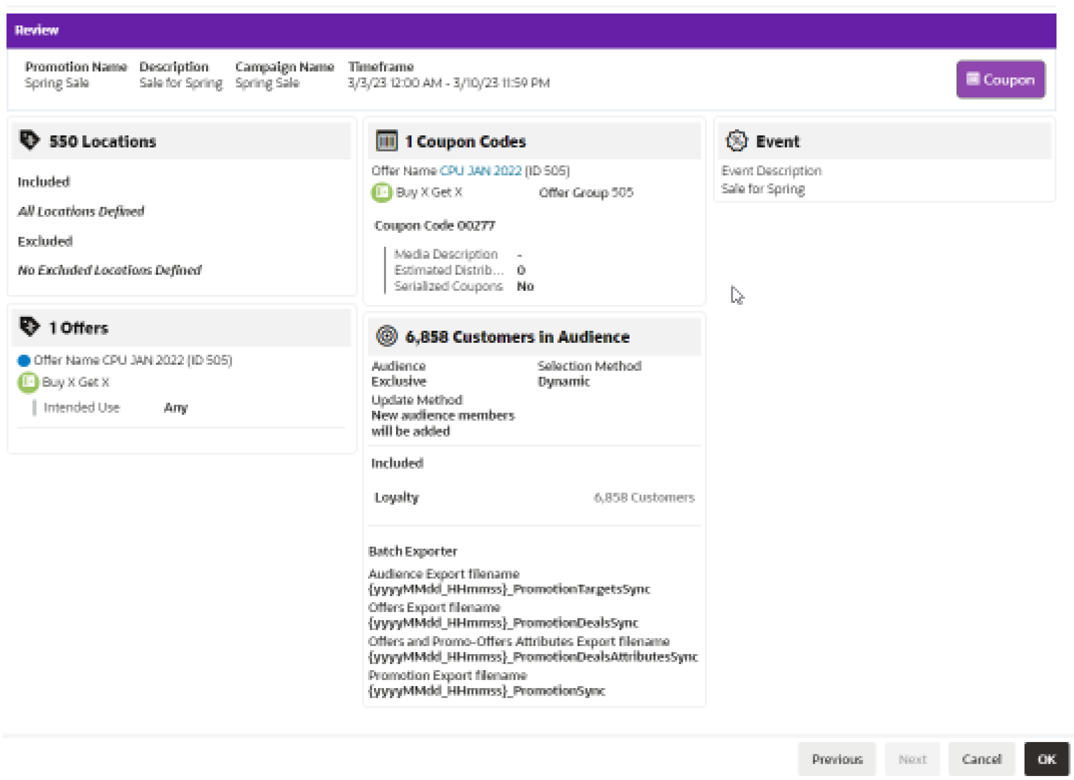
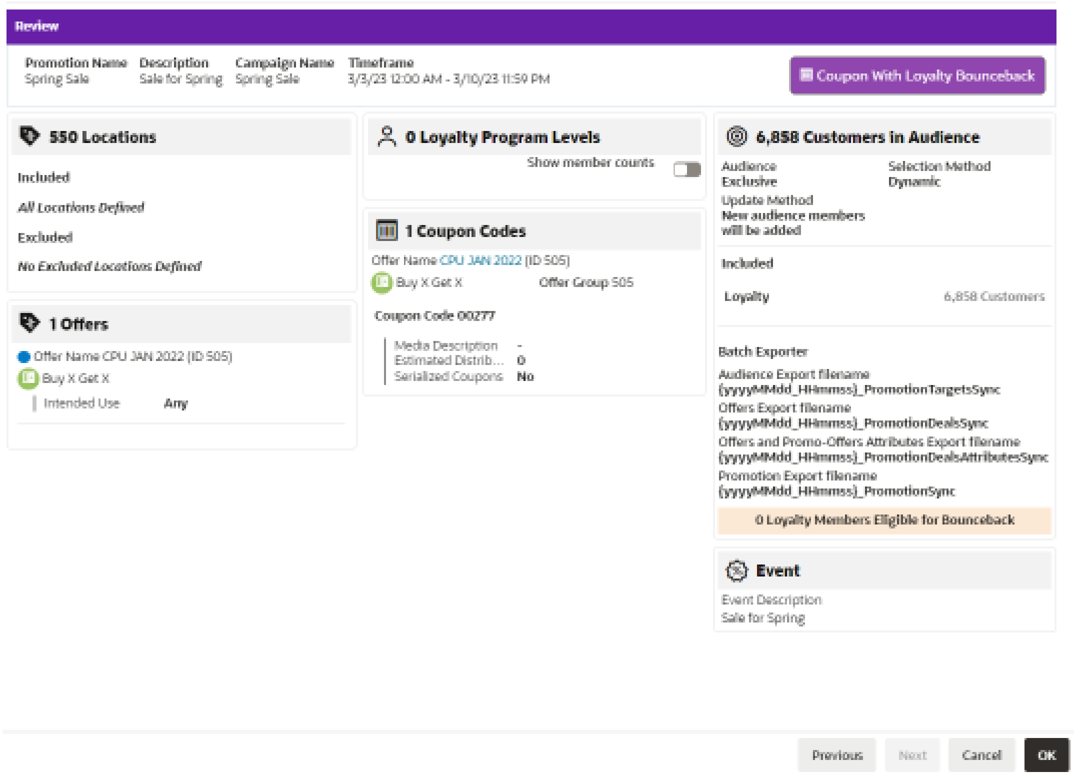


Figure 6-55 Review Tab - Loyalty Bounceback



38. Click **OK** to save the Promotion, or click **Cancel** to close the promotion without saving. Click **Previous** or any **Tab** to return to any point of the Create Promotion process.

Working with Coupon Promotions

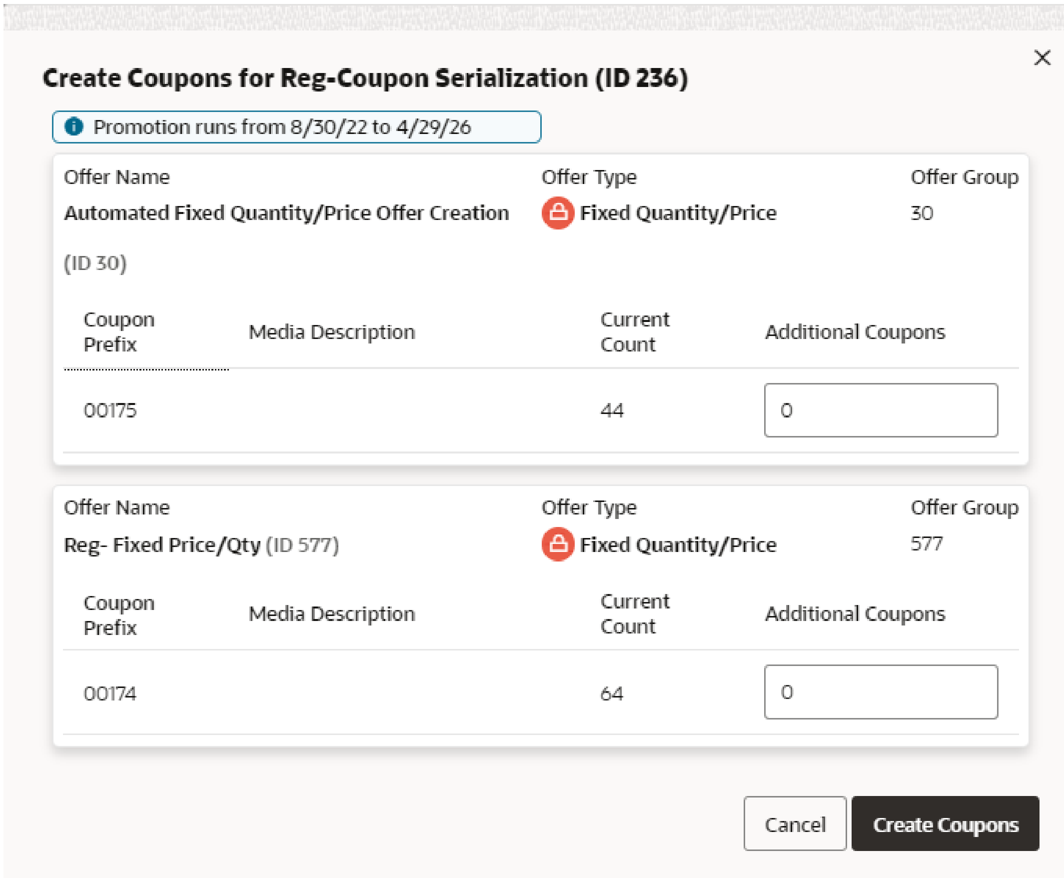
Creating Additional Coupons

Users have the ability to create additional coupons for a Coupon Promotion with Serialized Coupons, so that you are not limited to only the coupons generated at the time of saving the promotion. To create an additional coupon do the following steps:

1. View a Coupon Promotion (for more information on how to view a promotion see Viewing a Promotion).
2. Click the **Overflow Menu**.
3. Click **Create Coupons**.

> **Note:**
>
> Some Coupon Promotions cannot be edited once saved.

Figure 6-56 Create Coupons



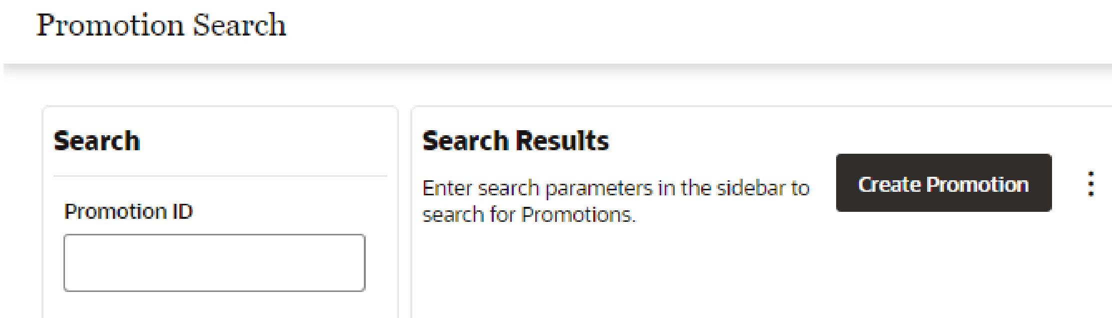
4. Enter the **number** of Additional Coupons.
5. Click **Create Coupons** to create additional coupons, or click **Cancel** to return to the View Promotion window without saving any changes.

Creating a Product Promotion

There are a few choices available to start the process of creating a promotion. The **Create Promotion** button is available in both the Promotion Home window as well as the Promotion Search window.

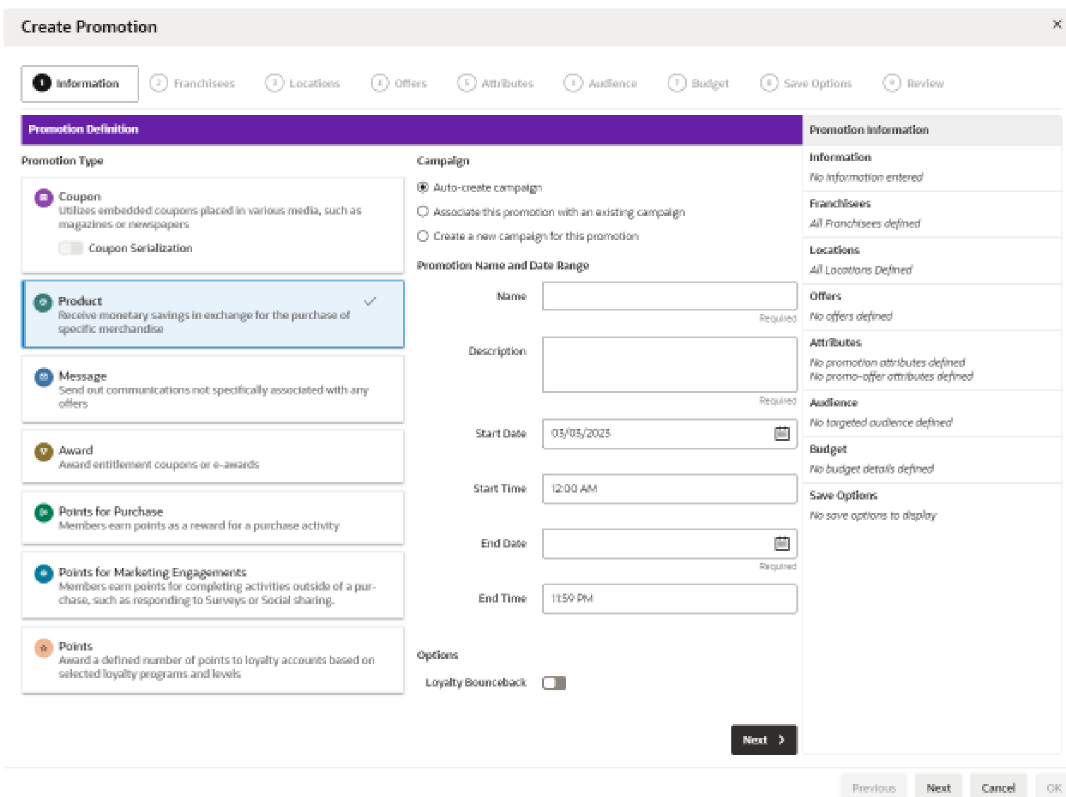
> **Note:**
>
> You will need the Promotion Home role to access the Promotion Home window.

Figure 6-57 Promotion Search



1. Click **Create Promotion,** which opens up the Promotion wizard to the Information tab.

Figure 6-58 Information Tab - Product



2. Select the **Promotion Type**: Product

> **Note:**
>
> Contact your administrator if you do not see the Promotion Types needed for your promotion.

3. Select **one** of the choices for the Campaign.

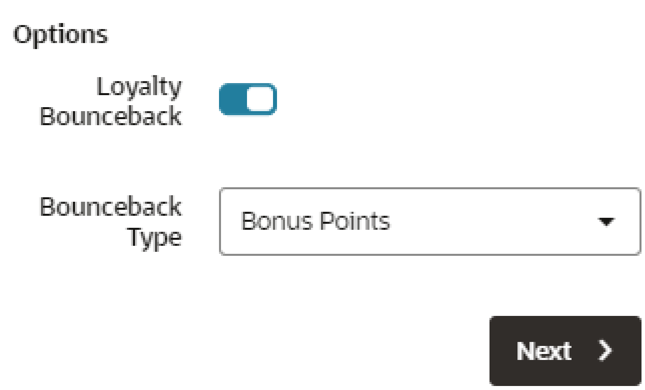
- **Auto-create Campaign** – The campaign is automatically created and will use the same name and description from the promotion name and description.
- **Associate this promotion with an existing campaign** – Uses existing campaigns in the system.
  - Click the **list arrow** and select an existing campaign.

> **Note:**
>
> The Start Date and End Date display underneath the Existing Campaign list.

- **Create a new campaign for this promotion** – A new campaign will be created with this promotion being the first added.

4. Enter the following information:
   - Enter a **Campaign Name** (for new Campaigns only).
   - Enter a **Description** (for new Campaigns only).
   - Enter a **Name**.
   - Enter a **Description**.
   - Select a **Start Date**.
   - Select a **Start Time**.
   - Select an **End Date**.
   - Select an **End Time**.
5. **Optional** - Slide the **Loyalty Bounceback** toggle to ON to activate.

Figure 6-59 Loyalty Bounceback - Activated



- Select a **Bounceback Type**.
  - Bonus Points
  - Entitlements

> **Note:**
>
> Loyalty Bounceback configuration occurs in **Step 12**, the **Offers** tab in Creating a Coupon Promotion.

6. When finished entering the Campaign and Promotion information, click **Next** to continue to the Figure 6-14, see step 8 in Creating a Coupon Promotion
7. The **Review** tab displays the key elements in the Promotion Setup.

Figure 6-60 Review Tab

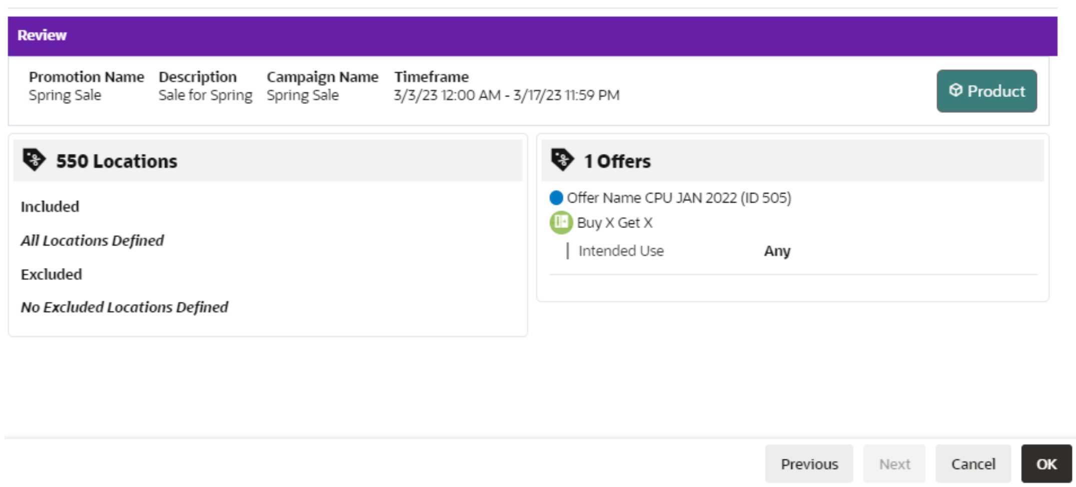
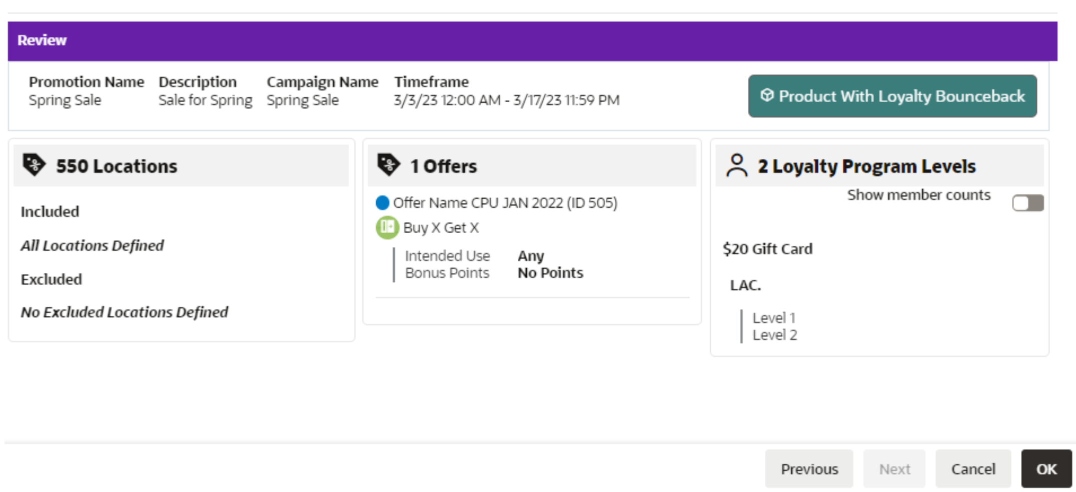


Figure 6-61 Review Tab - Loyalty Bounceback



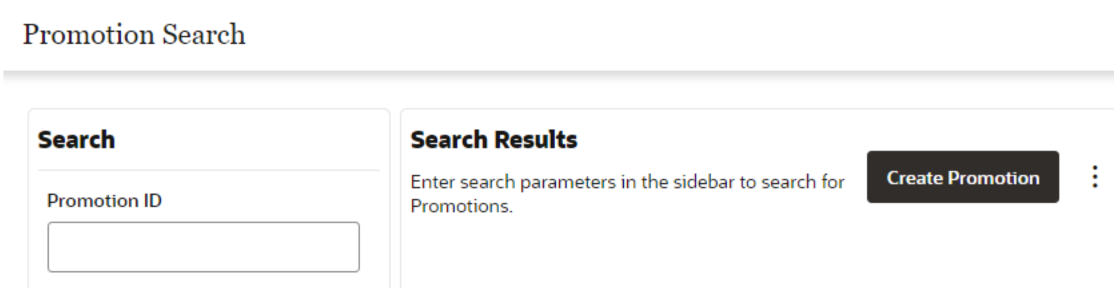
8. Click **OK** to save the Promotion, or click **Cancel** to close the promotion without saving. Click **Previous** or any **Tab** to return to any point of the Create Promotion process.

Creating a Message Promotion

There are a few choices available to start the process of creating a promotion. The **Create Promotion** button is available in both the Promotion Home window as well as the Promotion Search window.

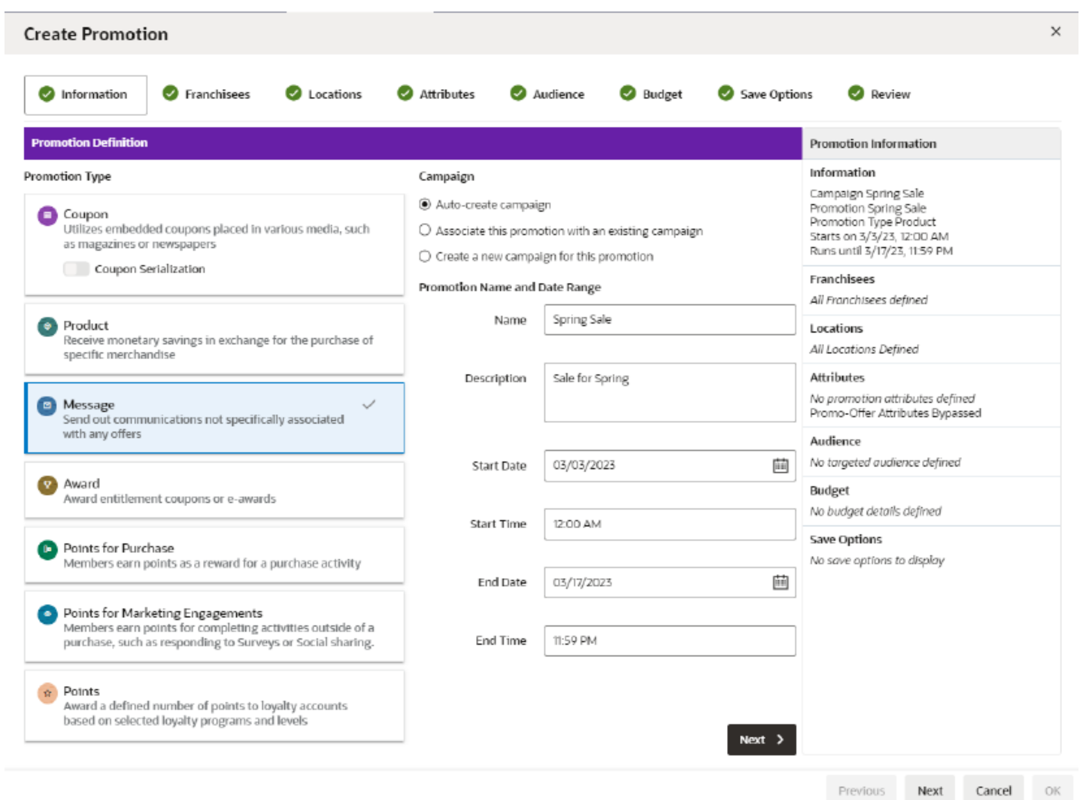
> **Note:**
>
> You will need the Promotion Home role to access the Promotion Home window.

Figure 6-62 Promotion Search



1. Click **Create Promotion,** which opens up the Promotion wizard to the Information tab.

Figure 6-63 Information Tab - Message



2. Select the **Promotion Type**: Message

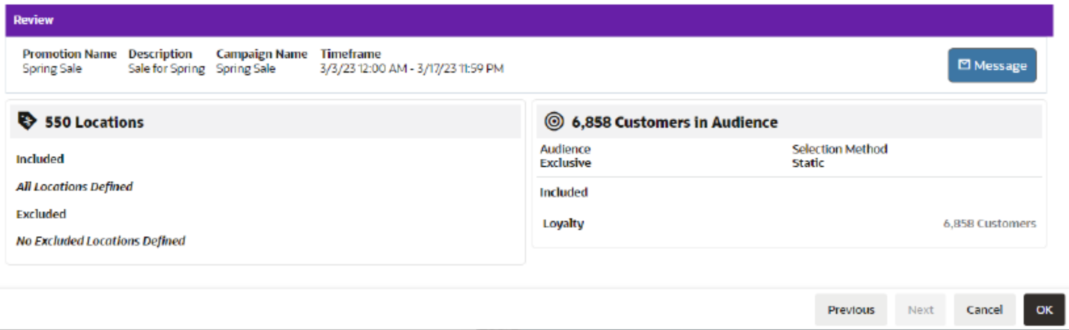
> **Note:**
>
> Contact your administrator if you do not see the Promotion Types needed for your promotion.

3. Select **one** of the choices for the Campaign.
   - **Auto-create Campaign** – The campaign is automatically created and will use the same name and description from the promotion name and description.
   - **Associate this promotion with an existing campaign** – Uses existing campaigns in the system.
     – Click the **list arrow** and select an existing campaign.

     > **Note:**
     >
     > The Start Date and End Date display underneath the Existing Campaign list.

   - **Create a new campaign for this promotion** – A new campaign will be created with this promotion being the first added.
4. Enter the following information:
   - Enter a **Campaign Name** (for new Campaigns only).
   - Enter a **Description** (for new Campaigns only).
   - Enter a **Name**.
   - Enter a **Description**.
   - Select a **Start Date**.
   - Select a Start **Time**.
   - Select an **End Date**.
   - Select an **End Time**.
5. When finished entering the Campaign and Promotion information, click **Next** to continue to theFigure 6-14, see step 8 in Creating a Coupon Promotion
6. The **Review** tab displays the key elements in the Promotion Setup.

Figure 6-64 Review Tab



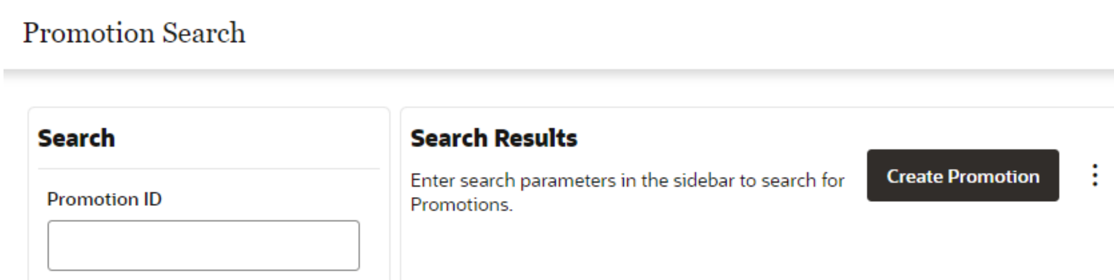
7. Click **OK** to save the Promotion, or click **Cancel** to close the promotion without saving. Click **Previous** or any **Tab** to return to any point of the Create Promotion process.

Creating an Award Promotion

There are a few choices available to start the process of creating a promotion. The **Create Promotion** button is available in both the Promotion Home window as well as the Promotion Search window.

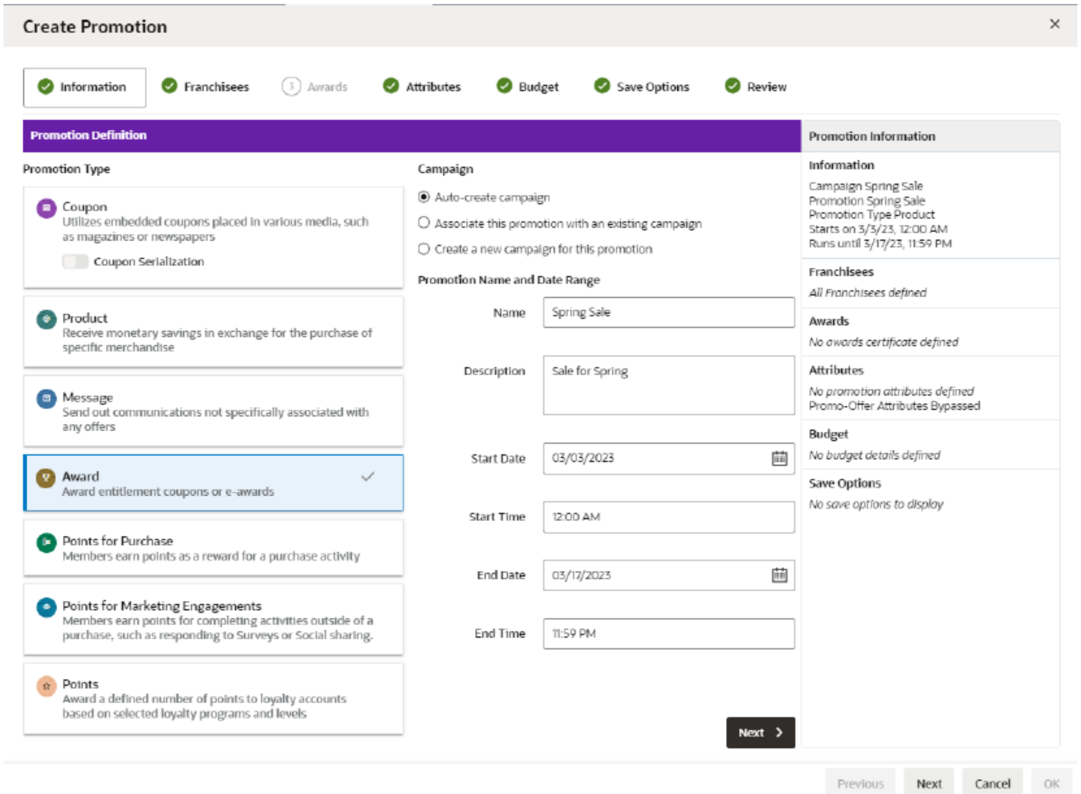
> **Note:**
>
> You will need the Promotion Home role to access the Promotion Home window.

Figure 6-65 Promotion Search



1. Click **Create Promotion,** which opens up the Promotion wizard to the Information tab.

Figure 6-66 Information Tab - Award



2. Select the **Promotion Type**: Award

> **Note:**
>
> Contact your administrator if you do not see the Promotion Types needed for your promotion.

3. Select **one** of the choices for the Campaign.
   - **Auto-create Campaign** – The campaign is automatically created and will use the same name and description from the promotion name and description.
   - **Associate this promotion with an existing campaign** – Uses existing campaigns in the system.
     – Click the **list arrow** and select an existing campaign.

     > **Note:**
     >
     > The Start Date and End Date display underneath the Existing Campaign list.

   - **Create a new campaign for this promotion** – A new campaign will be created with this promotion being the first added.
4. Enter the following information:

- Enter a **Campaign Name** (for new Campaigns only).
- Enter a **Description** (for new Campaigns only).
- Enter a **Name**.
- Enter a **Description**.
- Select a **Start Date**.
- Select a **Start Time**.
- Select an **End Date**.
- Select an **End Time**.

5. When finished entering the Campaign and Promotion information, click **Next** to continue to theFigure 6-14, see step 8 in Creating a Coupon Promotion

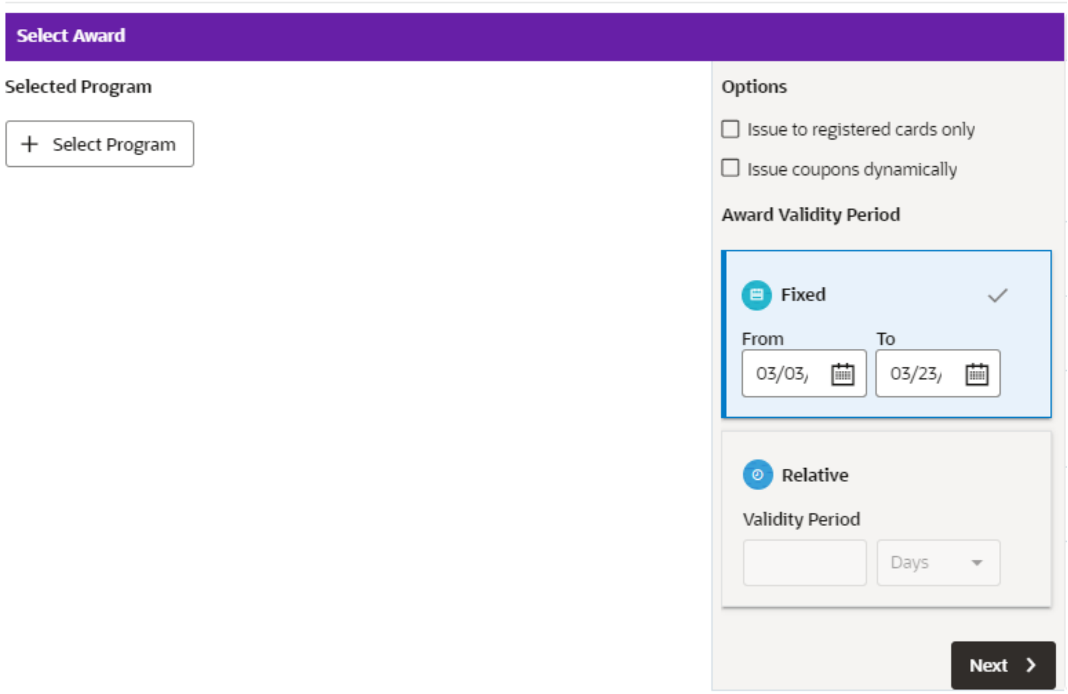
6. To assign awards for the Awards tab, do the following:

   Award promotions are based on award card definitions. Awards (EAwards or Entitlement Offer awards) are issued when the Promotion is generated. If the Promotion is defined as Issue to registered cards only, the awards will be created for cards within the selected program that are associated to a customer when the promotion is generated. This type of promotion is considered exclusively targeted to the customers with those cards. The targeting step will be available to define filters and/or control groups if desired.

   A segment can be added to filter the number of awards created. For example, an Award Program has 1,000 customers associated to cards, but this Promotion is only for those customers that live in Ohio. A segment can be defined for Ohio customers within that card program and added to the Promotion as Included Targets. In this case, only the customers that live in Ohio are included. An alternative is to add an Excluded Target segment, which could exclude all customers that live in New York. The promotion target can also be defined as Dynamic Targeting. If Dynamic Targeting is selected, any new customers that are associated to cards are dynamically added to the promotion target, and awards are issued when the Dynamic and Recurring Promotion job is run.

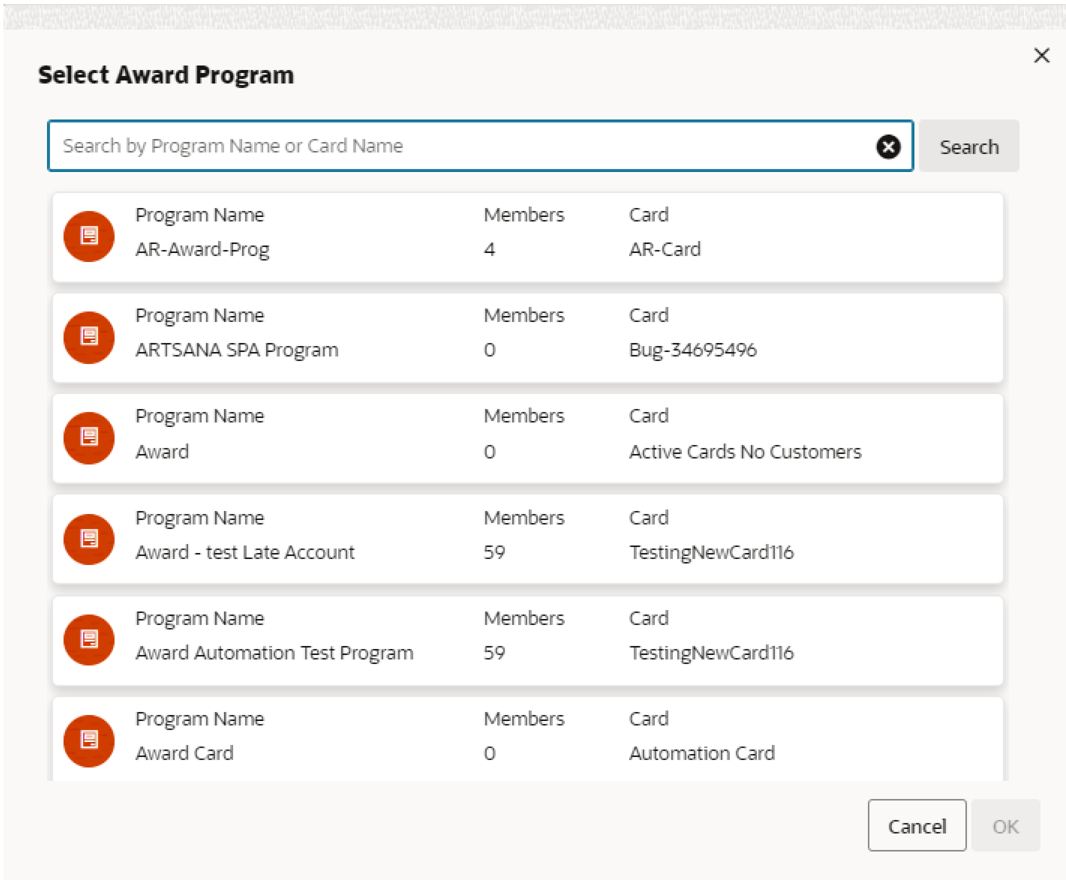
   If the promotion is defined to Issue Coupons Dynamically, the awards are created for activated cards within the selected program when the promotion is generated. The card does not need to be associated to a customer. This type of promotion is considered non targeted, since a customer association is not required. The promotion targeting step is skipped. This type of promotion is automatically considered a Dynamic and Recurring Promotion. For a Dynamic and Recurring Promotion, any new cards within the selected program that are activated will have an award issued when the Dynamic and Recurring Promotion job runs.

Figure 6-67 Select Award Tab



Click **+Select Program**, which retrieves all available Award Programs for selection.

Figure 6-68 Select Award Program



a. If the list is too long, you may enter some or all of the **Program Name** or **Card Name** in the Search for Award field to refine the results.

b. Click **Search**.

c. Click the **row** of the desired Award Program.

> **Note:**
>
> Only one program can be selected at a time.

d. Click **OK**.

> **Note:**
>
> Once the Program details display, if you wish to change the Award Program, you can click **Change**, which re-opens the Select Award Program window where you can select a different program for your promotion.

Certificate Options

Do the following to select a Certificate Type:

Figure 6-69   Award Program Certificate Options

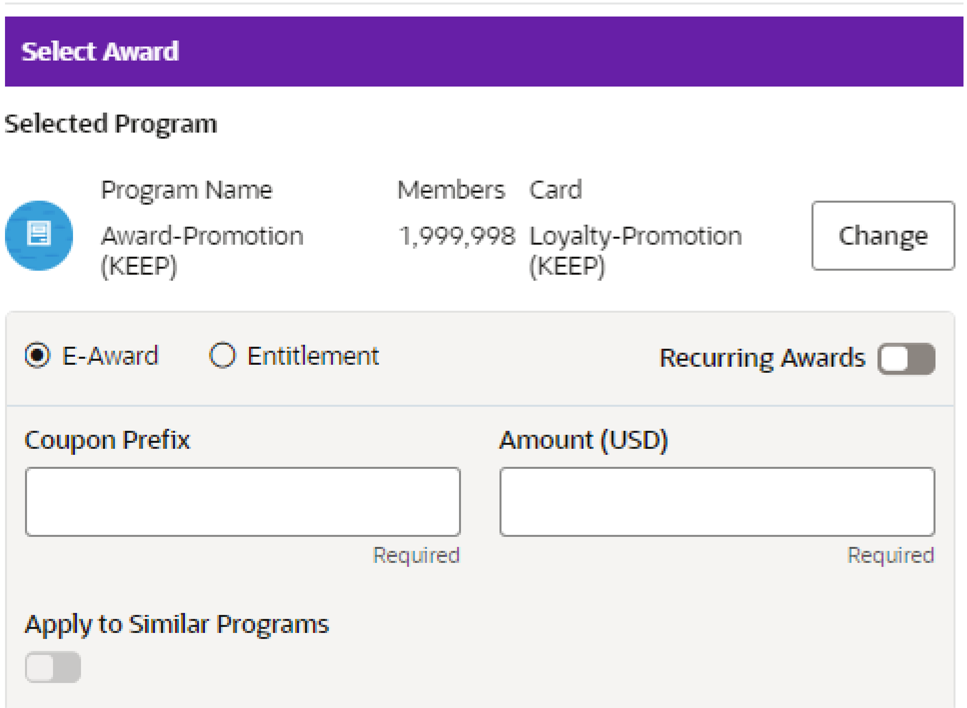
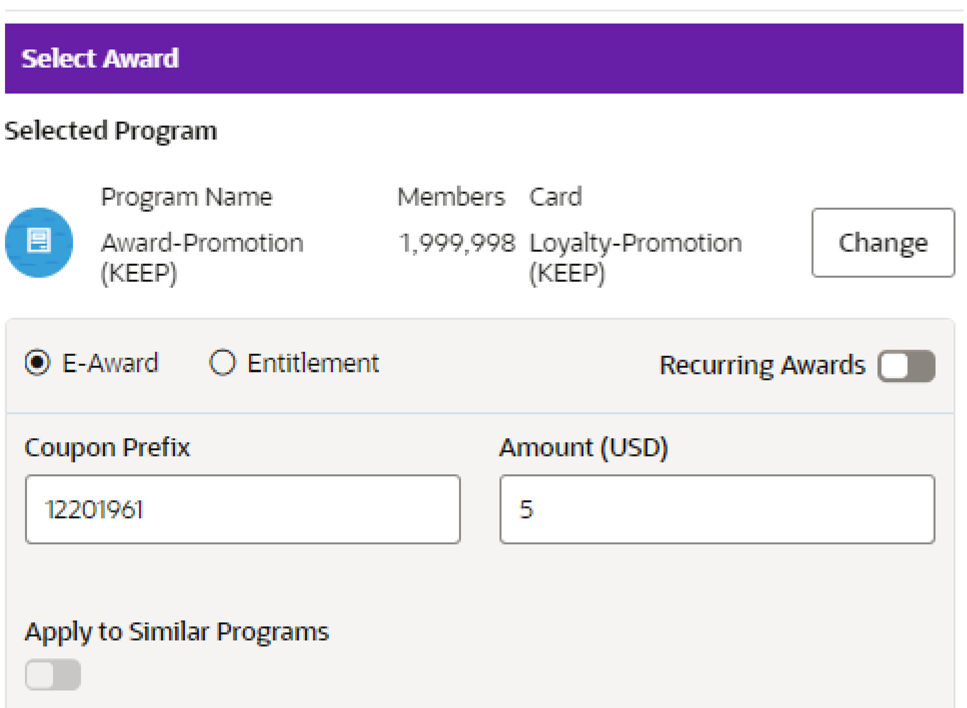


Figure 6-70   Award Program Certificate Options - E-Award

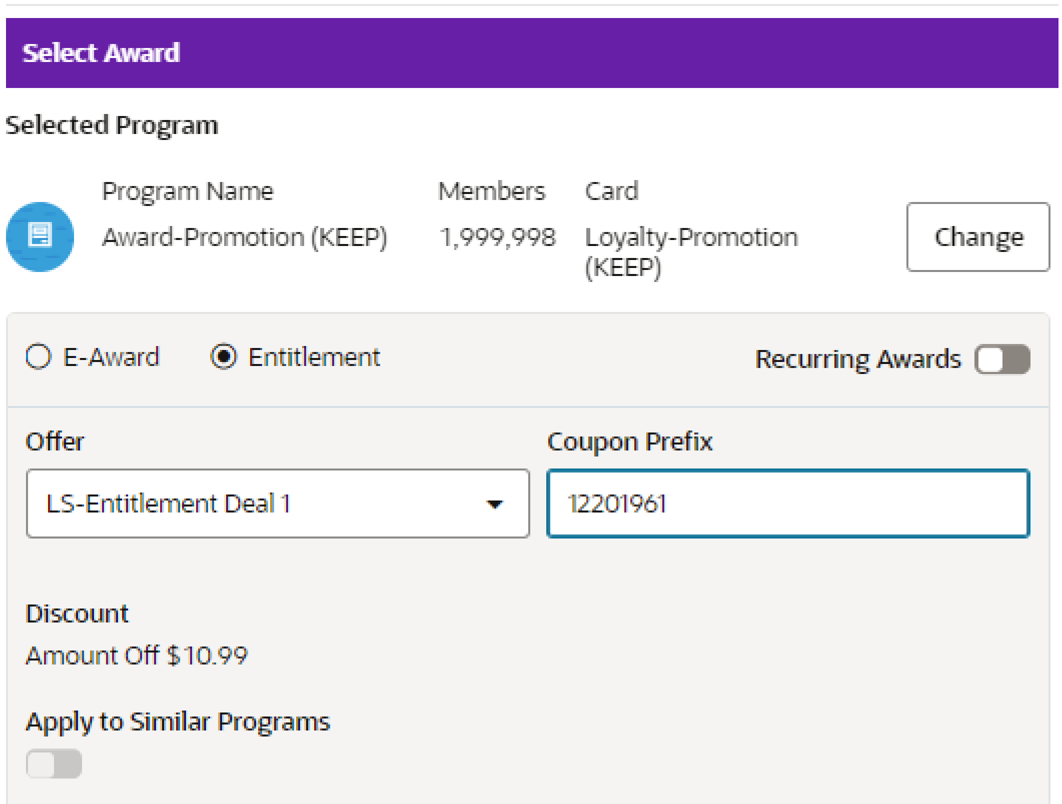


Select the **Certificate Type**: E-Award

a. Enter a **Coupon Prefix**. The value must be 10 or fewer characters.

b. Enter the **Amount** for the award certificate.

Figure 6-71 Award Program Certificate Options - Entitlement



Select the Certificate Type: **Entitlement**.

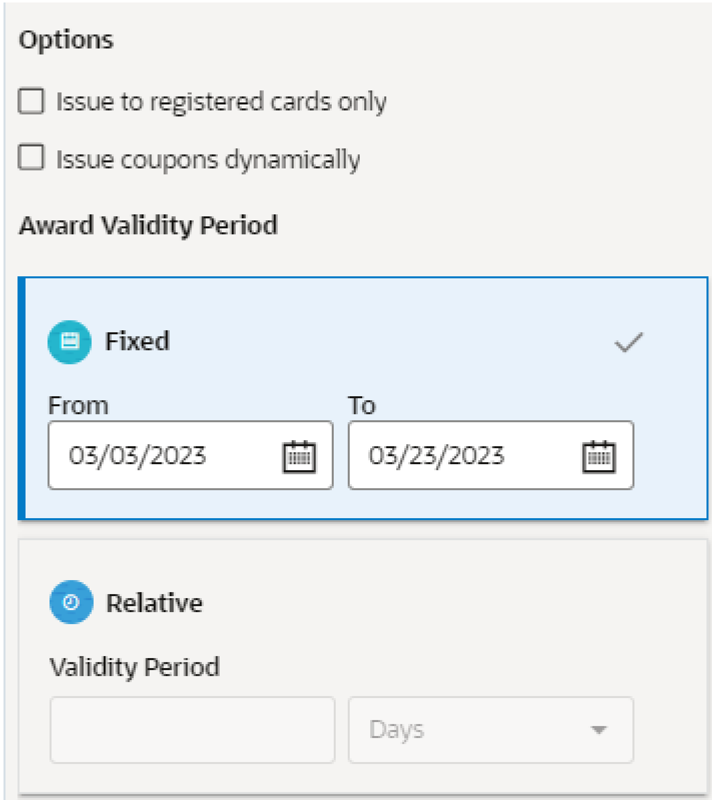
a. Click inside the **Offer** field to see the list of Entitlement Offers associated to the Award Program. If there is more than one, you can choose which one to select. The Offer you choose will then display the value of the discount associated with that Offer (in the Discount field).

b. Enter a **Coupon Prefix**. The value must be 10 or fewer characters.

c. Discount - this field will automatically populate with the discount for the Offer.

Options

Figure 6-72 Select Award Certificate Options

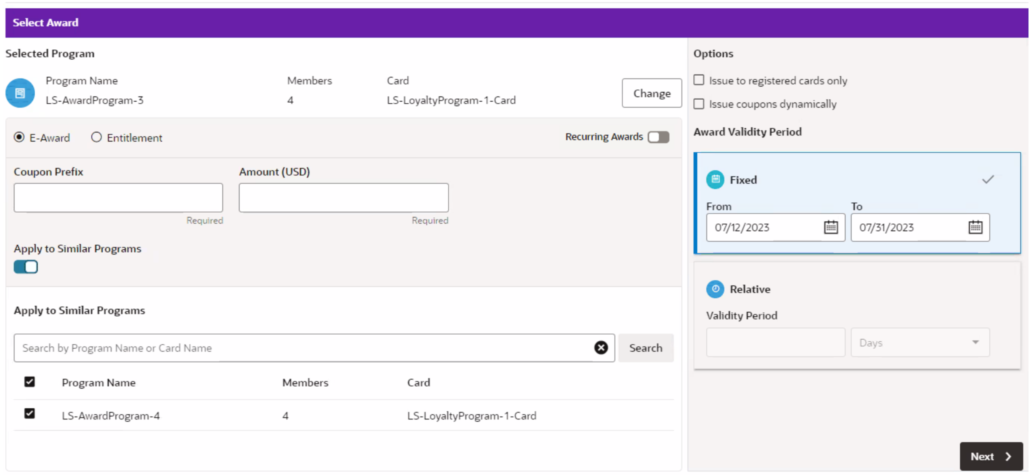


- Select **Issue to registered cards only** if the promotion should be restricted to cards that are registered to customers. If this option is not selected, coupons will be issued to all active accounts for the selected Award Program, and the option to target the promotion will not be available.
- Select **Issue coupons dynamically** to have the option to issue coupons dynamically. If this option is selected, coupons will be issued to all accounts that are activated when the program is generated.

Award Validity Period - Only one of the options will be available for the Award certificate.

- **Fixed** – The award certificate is valid between specific dates.
  - Start Date – The date on which the award certificate is **first valid**.
  - End Date – The **last date** on which the award certificate is valid.
- **Relative** – The award certificate is valid for a period of time after it is issued.
  - Validity Period – Period during which the award certificate is valid. The type of period is determined by the Period Type configuration.
  - Period Type – Units of time used to determine the validity period. Currently, this list can only be set to Days.
- **Apply to Similar Programs** is available when there is another program type on the same card with the same setup.

Figure 6-73 Apply to Similar Programs



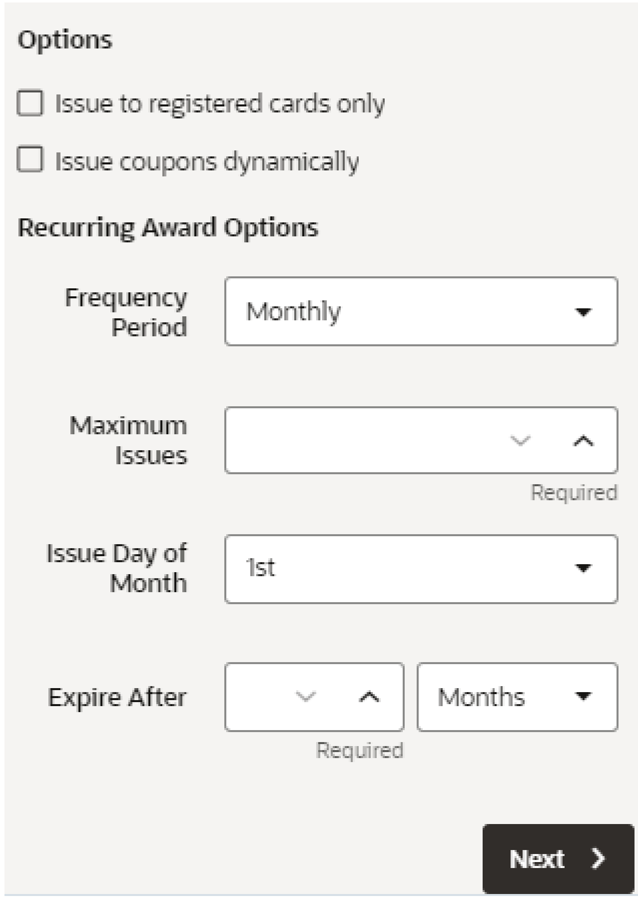
- To Filter the list, enter some or all of the Program Name or Card Name in the Search field and click **Search**.
- Select **one or more** checkboxes for the rows of the desired Award Programs you wish to add. Click the checkbox next to **Program Name** to select all programs.
- Click **OK**.

Recurring Awards

Recurring Awards provide the user the ability to issue an award on a recurring basis during the promotion period. This feature will allow the user to define how often the award will be issued (Daily, Weekly or Monthly) and how many awards in total can be issued for the duration of the promotion. The award can be either an E-Award or an Entitlement offer and can be set to expire after defined days, weeks or months after the award is issued.

> **Note:**
>
> Recurring Awards feature appears when configured by your Administrator.

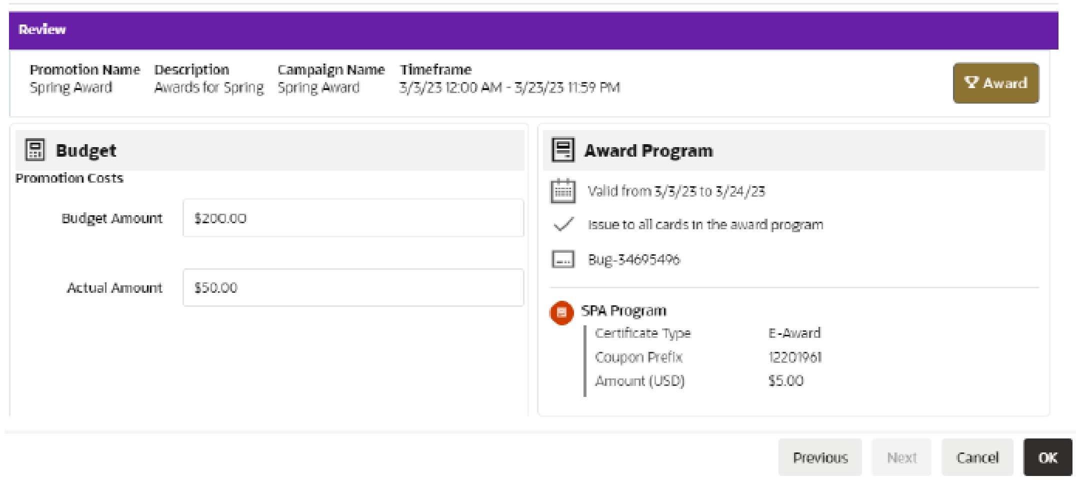
Figure 6-74 Recurring Awards



- Select the **Frequency Period**: Daily, Weekly, or Monthly
- Enter the number of **Maximum Issues**: The number of times the award can be issued
- Select the **Issue Day of Month**
- Enter the **Expire After** increment and select the frequency period

7. When finished entering Awards for the Promotion, click **Next** to continue to Figure 6-31 , step 14 in Creating a Coupon Promotion.
8. The **Review** tab displays the key elements in the Promotion Setup.

Figure 6-75 Review Tab



9. Click **OK** to save the Promotion, or click **Cancel** to close the promotion without saving. Click **Previous** or any **Tab** to return to any point of the Create Promotion process.

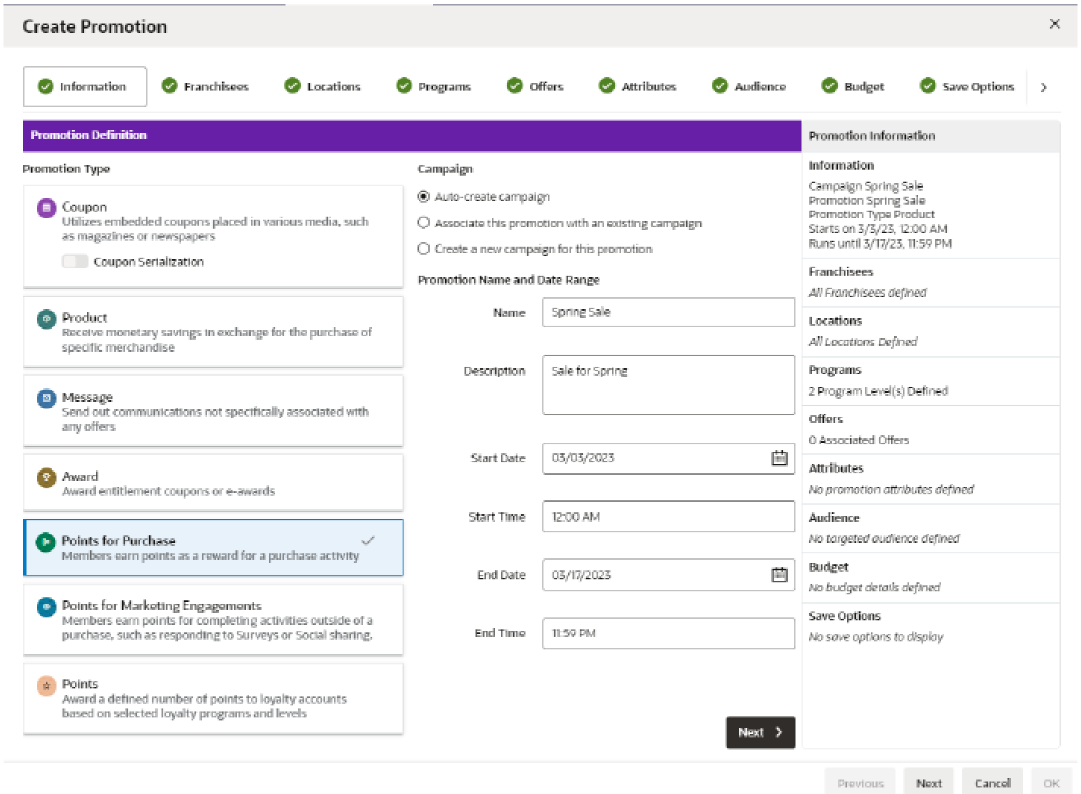
Creating a Points for Purchase Promotion

There are a few choices available to start the process of creating a promotion. The **Create Promotion** button is available in both the Promotion Home window as well as the Promotion Search window.

> **Note:**
>
> You will need the Promotion Home role to access the Promotion Home window.

1. Click **Create Promotion**, which opens up the Promotion wizard to the Information tab.

Figure 6-76 Information Tab - Points for Purchase



2. Select the **Promotion Type**: Points for Purchase

> **Note:**
>
> Contact your administrator if you do not see the Promotion Types needed for your promotion

3. Select one of the choices for the Campaign.
   - **Auto-create Campaign** – The campaign is automatically created and will use the same name and description from the promotion name and description.
   - **Associate this promotion with an existing campaign** – Uses existing campaigns in the system.
     – Click the list arrow and select an **existing campaign**.

     > **Note:**
     >
     > The Start Date and End Date display underneath the Existing Campaign list.

   - **Create a new campaign for this promotion** – A new campaign is created with this promotion being the first added.
4. Enter the following information:
   - Enter a **Campaign Name** (for new Campaigns only).

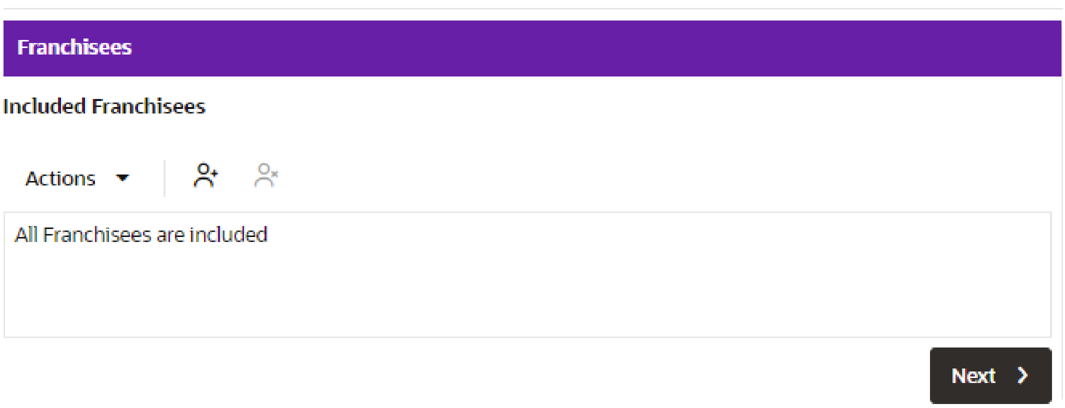
- Enter a **Description** (for new Campaigns only).
- Enter a **Name**.
- Enter a **Description**.
- Select a **Start Date**.
- Select a **Start Time**.
- Select an **End Date**.
- Select an **End Time**.

5. When finished entering the Campaign and Promotion information, click **Next** to continue to the **Franchisees** tab.

> **Note:**
>
> This tab will only display if the `EnableFranchiseSupport` configuration is enabled, and Franchisees have been created.

6. By default, all franchisees are assigned to the promotion. To make changes to those assignments, do the following:

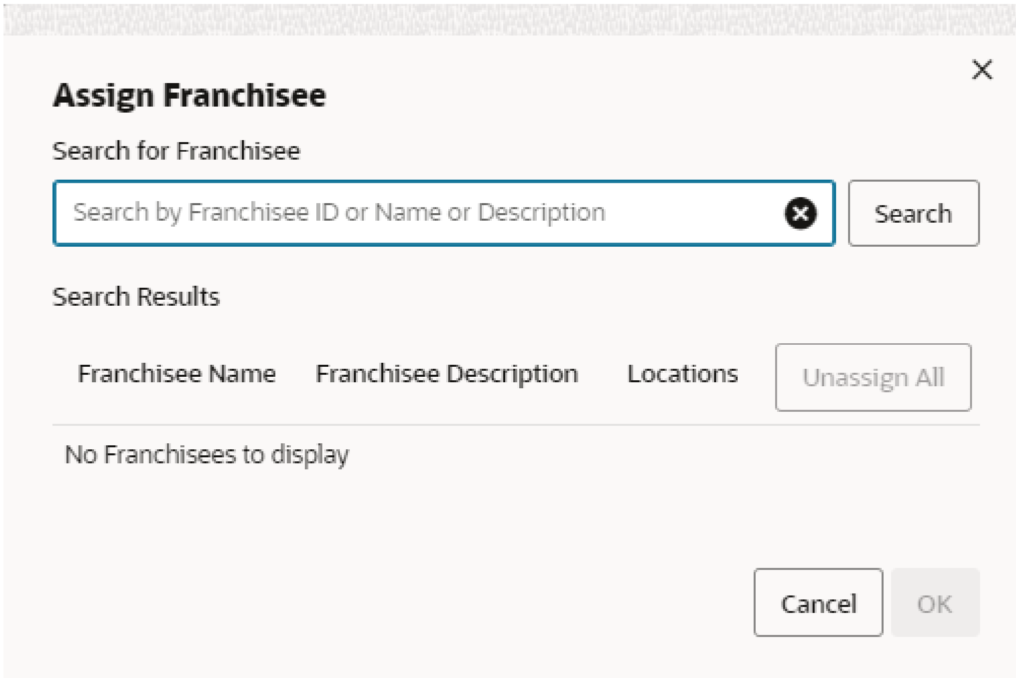
Figure 6-77 Franchisees Tab



Assigning a Franchisee

a. Click the **Actions Menu**, then, click **Assign**, or click the **Add (+)** icon. This opens the Add Franchisee window.

Figure 6-78 Assign Franchisee



b. In the Search for franchisee search box, enter part or all of the **Name**, **ID**, or **Description**, then click **Search**.

> **Note:**
>
> You can also leave blank and click Search to return all Franchisees.

c. To change the assignment from ALL (which is defaulted) click **Assign** on just the specific franchisees you wish to assign for this promotion. Only Franchisees associated with the user are displayed in the list.

d. Click **OK** to accept the changes or **Cancel** to close the window without saving.

Figure 6-79 Confirmation Notification

> **Note:**
>
> A confirmation notification appears to confirm the franchisee has been assigned.

Deleting a Franchisee

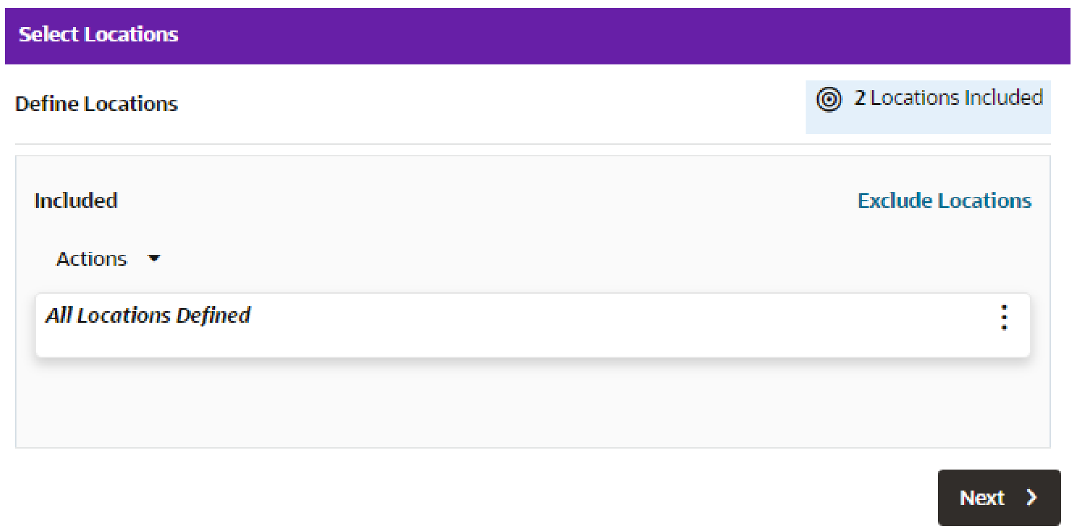
a. In the included Franchisees window, highlight the desired **row**.

b. Click the **Action Menu**, and click **Delete**, or click the **X** icon.

> **Note:**
>
> A confirmation notification appears to confirm the franchisee has been deleted.

7. When finished entering the Franchisees information, click **Next** to continue to the **Locations** tab.
8. Enter the following for the **Locations** tab:

Figure 6-80 Locations Tab



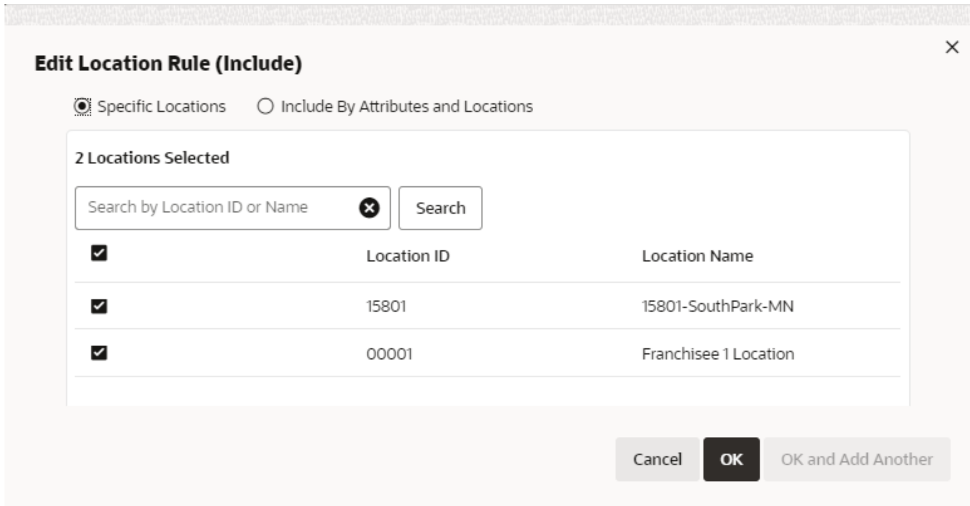
Define Locations

> **Note:**
>
> By default, **ALL** locations are added to the promotion. You can select the Overflow Menu to edit the list of locations to include.

- Included
  a. If you wish to change the Locations assigned to this Promotion, click the **Overflow Menu**, then click **Edit**. This opens the Edit Location Rule window.

  Specific Locations
  a. Click the **Specific Location** option.

Figure 6-81 Edit Location Rule (Include) - Specific Locations



> **Note:**
>
> The Location ID check box at the top of the list enables you to deselect or select all locations. If you deselect all the locations, then you can scroll through the list or search for a specific location.

b. Enter part or all of a **Location ID** or **Name**.

c. Click **Search**.

d. Click Add to select a location.

e. Click **Add** for another location means you are using the condition **AND**. Both conditions must be met.

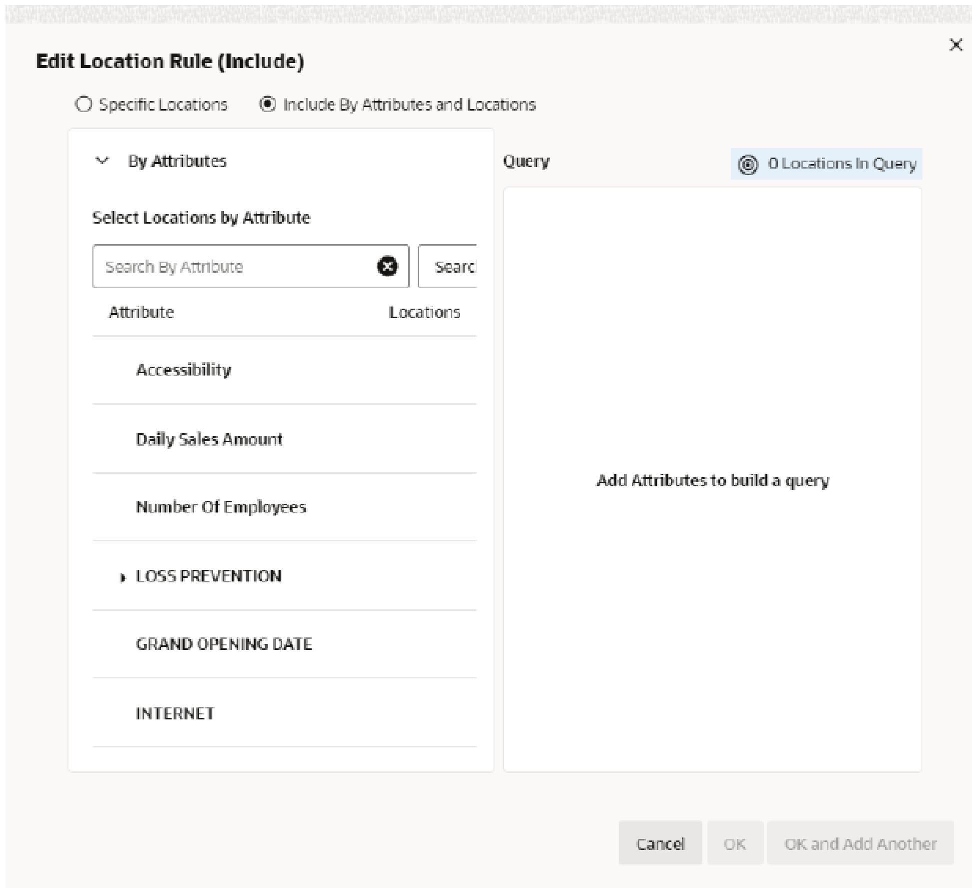
f. Click **OK and Add Another** to keep you in the same search results and use the condition **OR**. One or more of the conditions must be met when you click **Add for another location**.

g. Click **Ok** to close the window, or click **Cancel** to close the window without saving.

Include by Attributes

a. Click the **Include by Attributes and Locations** option.

Figure 6-82 Edit Location Rule (Include) - Include by Attributes and Locations



> **Note:**
>
> A list of attributes enables you to add one more attributes in order to create a query to select only the locations that fit the requirements.

b. Click **Add** to select an attribute. Some Location Attributes can be collapsed or expanded. They will default to collapsed to allow you to scroll thru the list easier and expand the attributes they you to add.

c. Click **Add** for another attribute means you are using the condition **AND**. Both conditions must be met.

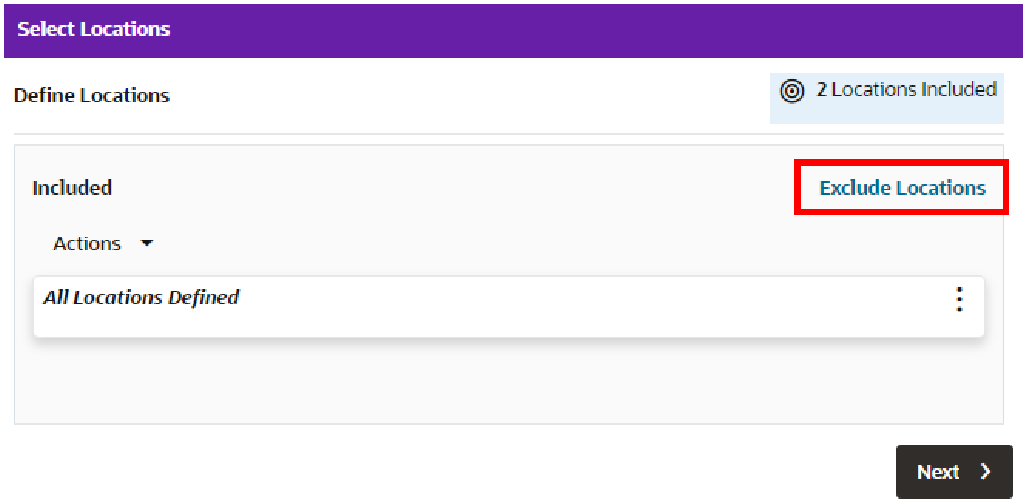
d. Click **OK and Add Another** to keep you in the same window and use the condition **OR**. One or more of the conditions must be met when you click the **Add** button for another attribute.

e. Click **OK** to close the window, or click **Cancel** to close the window without saving.

- Excluded Locations - This option allows you to select specific locations to exclude from the promotion.

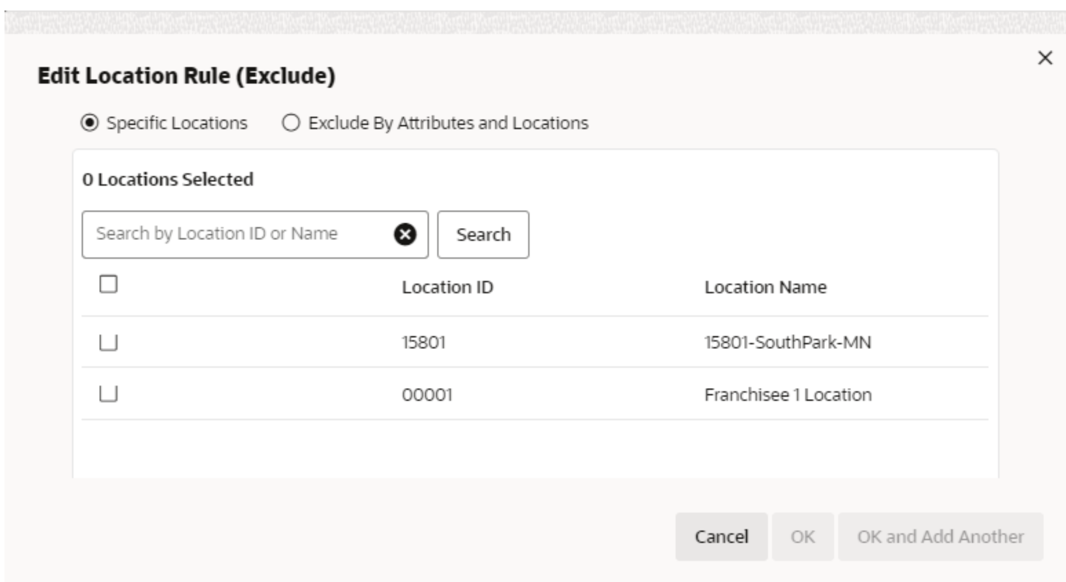
a. Click the **Exclude Locations** link.

Figure 6-83 Select Locations



Specific Locations

Figure 6-84 Edit Location Rule (Exclude) - Specific Locations



a. Click the **Specific Location** option.

> **Note:**
>
> The Location ID check box at the top of the list enables you to deselect or select all locations. If you deselect all the locations, then you can scroll through the list or search for a specific location.

b. Enter part or all of a **Location ID** or **Name**.

c. Click **Search**.

d. Click **Add** to select a location.

e. Click **Add for another location** means you are using the condition **AND**. Both conditions must be met.

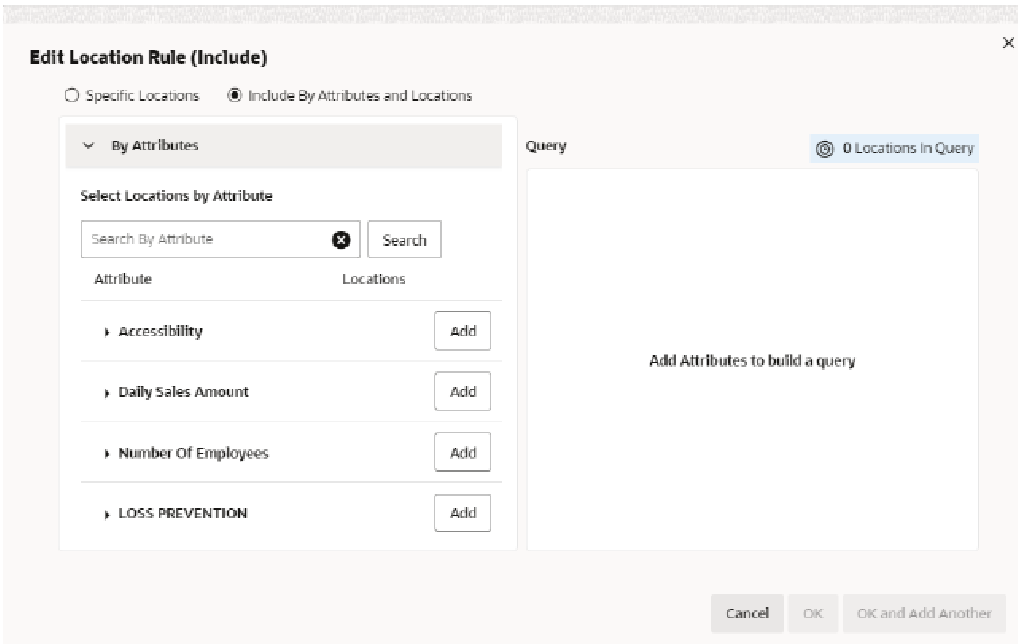
f. Click **OK and Add Another** to keep you in the same search results and use the condition **OR**. One or more of the conditions must be met when you click **Add for another location**.

g. Click **OK** to close the window, or click **Cancel** to close the window without saving.

Exclude by Attributes

a. Click the **Exclude by Attributes and Locations** option.

Figure 6-85 Edit Location Rule (Exclude) - Exclude By Attributes and Locations



b. Click **Add** to select an attribute. Some Location Attributes can be collapsed or expanded. They will default to collapsed to allow you to scroll thru the list easier and expand the attributes they you to add.

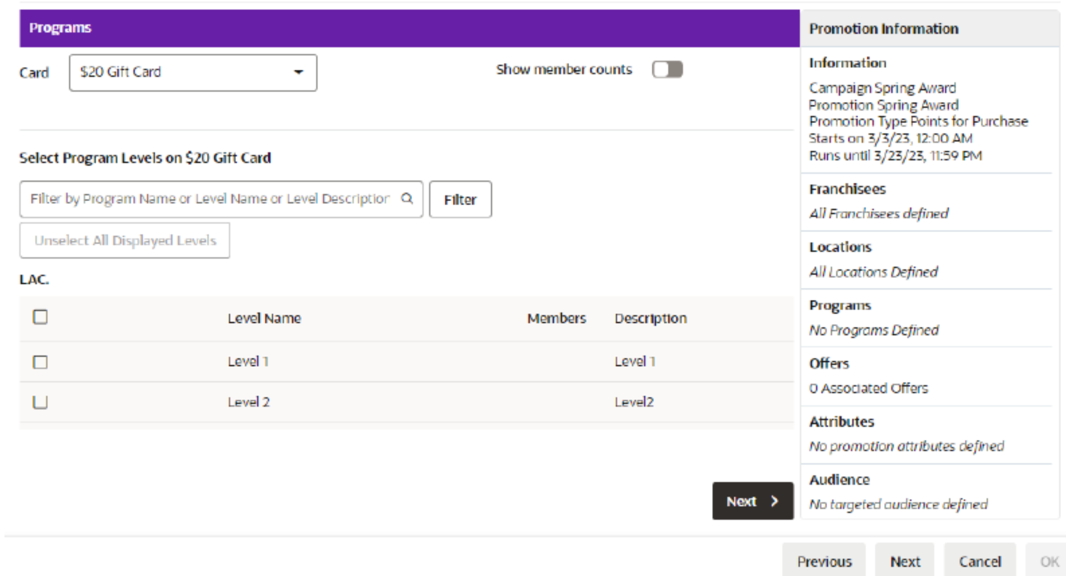
c. Click **Add for another** attribute means you are using the condition **AND**. Both conditions must be met.

d. Click **OK and Add Another** to keep you in the same window and use the condition **OR**. One or more of the conditions must be met when you click **Add** for another attribute.

e. Click **OK** to close the window, or click **Cancel** to close the window without saving.

9. When finished entering Locations for the Promotion, click **Next** to continue to the **Programs** tab.

Figure 6-86 Programs Tab - Points for Purchase



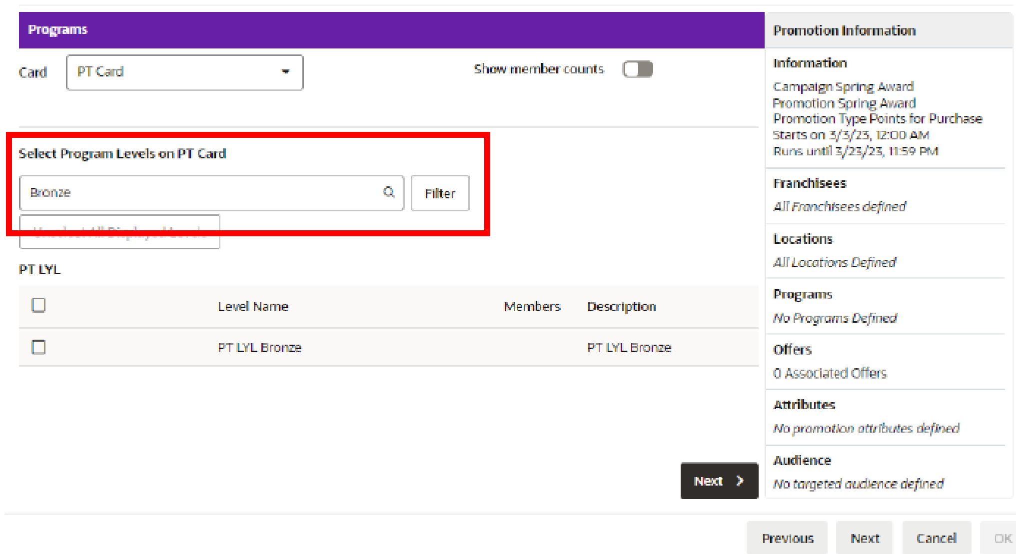
10. To begin the Programs tab, take the following actions:
    a. Select a **Card**.

       A list of cards display all active cards for the user to select from. If there is only one card to select from, the card appears by default and the list arrow is unavailable for selection.

       > **Note:**
       >
       > The Select Program Levels section title will contain the name of the card selected.

    b. In the Filter for **Select Programs Levels on** field, enter all or part of the **Program Name**, **Level Name**, or **Level Description** of the specific loyalty program you want to search for.

Figure 6-87 Filter Results



c. Select one or more Loyalty Programs. The Deselect All Displayed Levels button clears all selections.

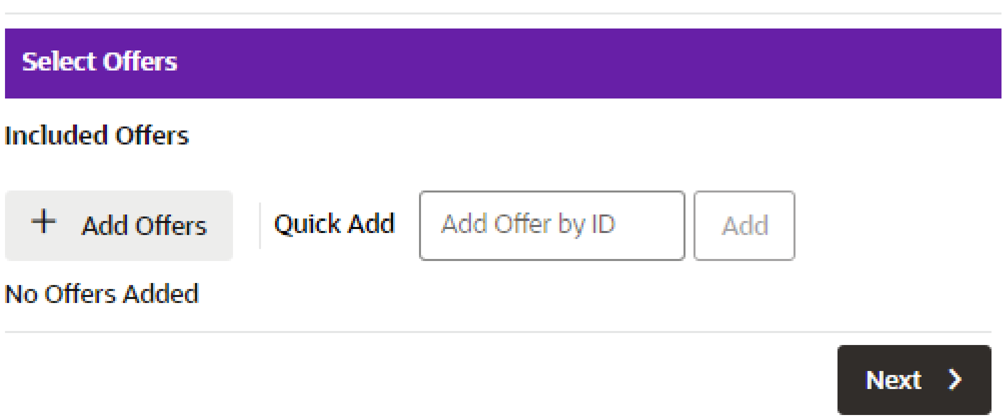
11. When finished selecting Loyalty Programs for the Promotion, click **Next** to continue to the **Offers** tab.

12. To begin the Offers tab, take the following actions:

    There are two methods to add offers, either:

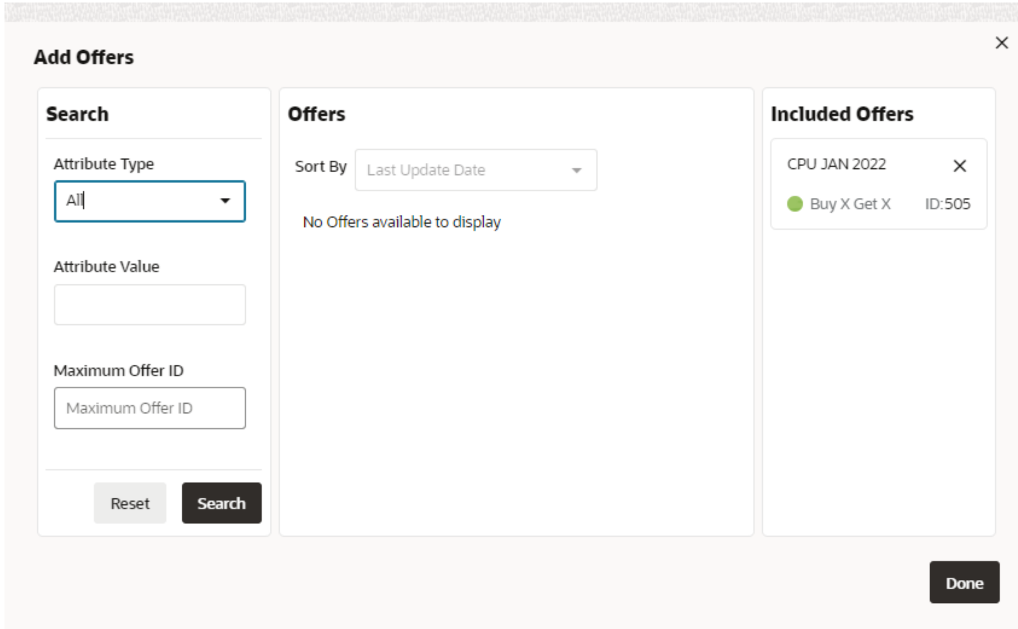
    - Select the **Quick Add** option to search for a known Offer ID.
    - Click **+Add Offers** for an Advanced Offer Search.

Figure 6-88 Offers Tab



- Click **+ Add Offers**. The Add Offers window enables you to search for offers to include in the promotion. Once you receive the results of the search you can sort the results, if desired for easier selection, before adding them to the promotion. Those offers appear in the Included Offers panel.

Figure 6-89 Add Offers - Points for Purchase



- In the Search section, enter any or all of the following information:
  - **Attribute Type** – Search for an Offer by the Attribute assigned to the Offer. The default is ALL.
  - **Attributes Value -** Type-ahead search according to the Attribute Type selected.
  - **Maximum Offer ID** – Highest Offer ID number you wish to limit the search to. This will return that offer ID and all others with a lower number.
  - **Offer ID** – This Text Field searches all the Offers currently present in the application. The default is an empty field.
  - **Offer Name** – Name of the Offer.
  - **Offer Type** – Search the Offer by Offer Type (Single Select). The value **Buy X Get Points** is populated in the list of options.
  - **Intended Use** – The type of Promotion associated with the Offer you are searching for. The value **Loyalty** is populated in the list of actions.
- Click **Search**.

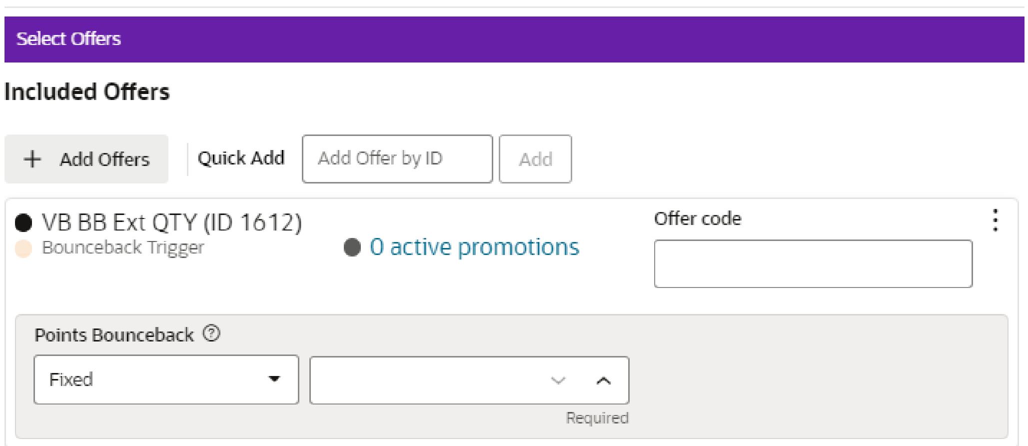
> **Note:**
>
> To retrieve all the offers in the system, select Search without entering any search criteria. All offers are returned to the Offers results section. From there, you can scroll through the list to choose which offers to add.
>
> To clear the search fields and restore default selections in the search page, click **Reset**.

- Upon selecting **Search**, the results display in the Offers section. Use the **Sort by list** to sort by the following options:
  - Last Update Date

- Offer Name
- Offer Type
- Intended Use
- Offer ID

- In the Add Offers window, you can select any of the offers in the Include Offers section and remove them by selecting the **X** in the top right corner of the Offer. Click **Add** to include the offers in the promotion.
- When finished selecting offers to add to the Promotion, select **Done**, which returns you to the Select Offers window.
- On the Select Offers window, you can select the **Remove** option from the **Overflow Menu** to remove an offer from the promotion.

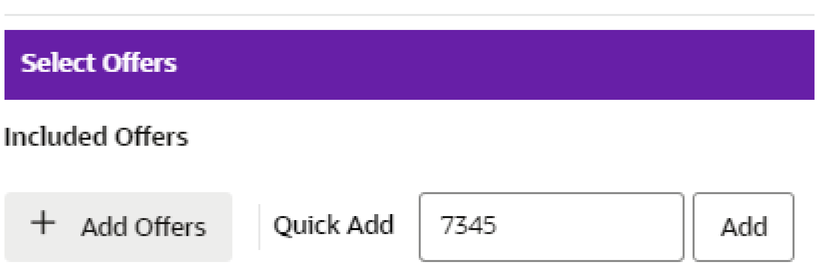
Figure 6-90 Offer Code



> **Note:**
>
> Some included offers enable the Offer Code Field. A retailer can use it to qualify or track a particular offer.

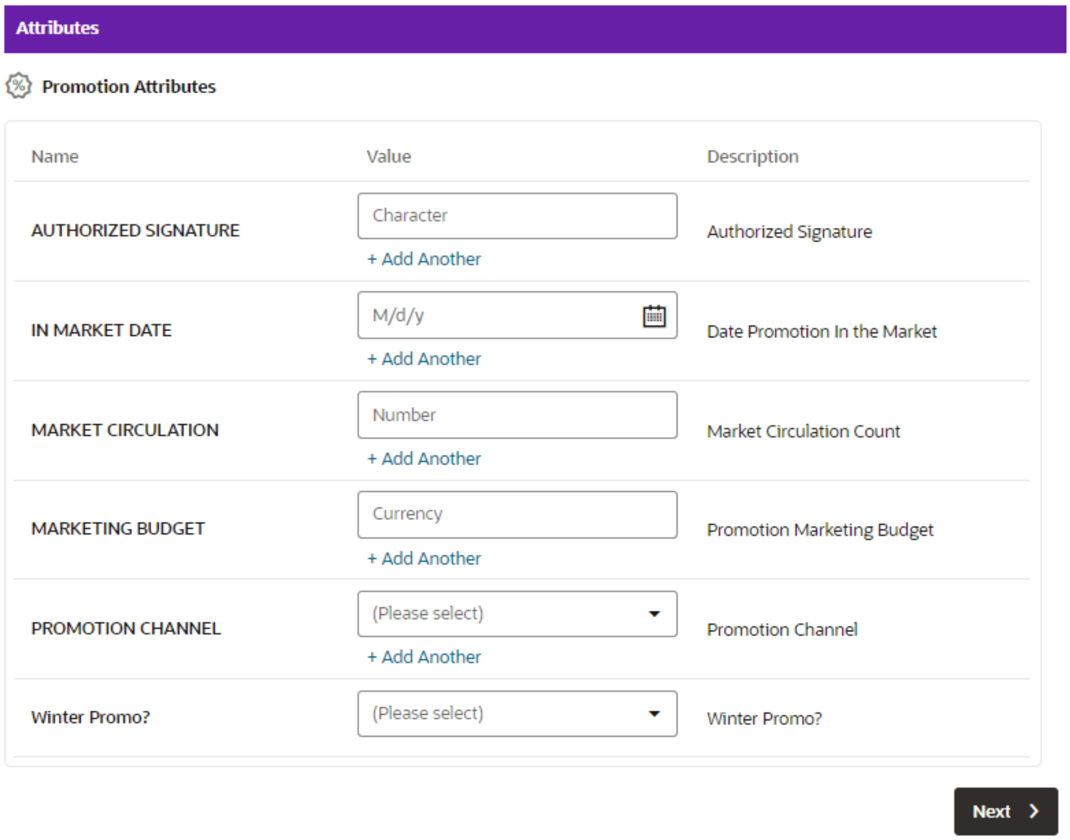
- Enter the **Offer ID** in the Quick Add field and then click **Add** to also add offers to a promotion.

Figure 6-91 Select Offers Quick Add



13. When finished entering Offers for the Promotion, click **Next** to continue to the **Attributes** tab.
14. Enter the following for the **Attributes** tab.

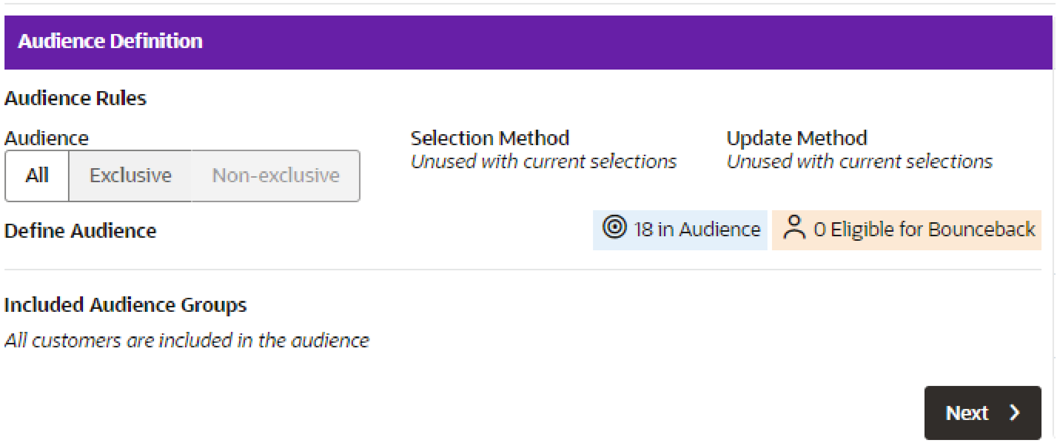
Figure 6-92 Promotion Attributes



- Complete values for any Promotion Attributes you want added to the promotion. Fields marked with an asterisk are required.

15. When finished adding Attributes for the Promotion, click **Next** to continue to the **Audience** tab.
16. Enter the following for the Audience tab.

Figure 6-93 Audience Tab



Audience Rules – **Exclusive** is only used here to define the audience.

Exclusive Targeting - If you create an exclusive targeted promotion, this means that only the customers you've identified in your target group are eligible to receive the promotion at the point of sale.

- Selection Method
  - **Static** – Only customers defined at this time are considered eligible for the promotion.
  - **Dynamic** – Dynamic can not only add customers but also remove customers that no longer apply. When Dynamic is selected, Update Method is available.

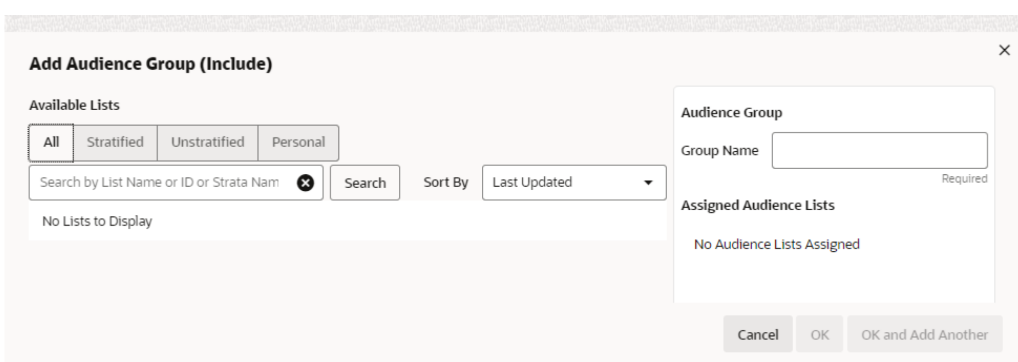
  New audience members will be added – When the Dynamic and Recurring Promotions job runs, any new customers found that meet the criteria, are added to the audience. All customers currently in the audience will remain in the audience.

  Audience members can be added and removed – When the Dynamic and Recurring Promotions job runs, any new customers found that meet the criteria, are added to the audience. Additionally, only the customers that meet the criteria will be included in the audience. If the customer is in the audience before the job runs, but no longer meets the criteria, the customer will be removed from the audience.

Define Audience - Included Audience Groups

a. Click + **Add Audience Group**.

Figure 6-94 Add Audience Group (Include)



b. Select an **Available List** type

   All - Default

   Stratified - The Customers within a Stratified list are divided into levels.

   Unstratified - The Customers within an Unstratified list are not differentiated into separate groups.

   Personal - Customers maintained by the user.

c. In the Search field, enter some or all of the **List Name**, **ID**, or **Strata Name**.

d. Click **Search**. The results can be sorted by using the Sort by list menu with the following options:

   Last Updated

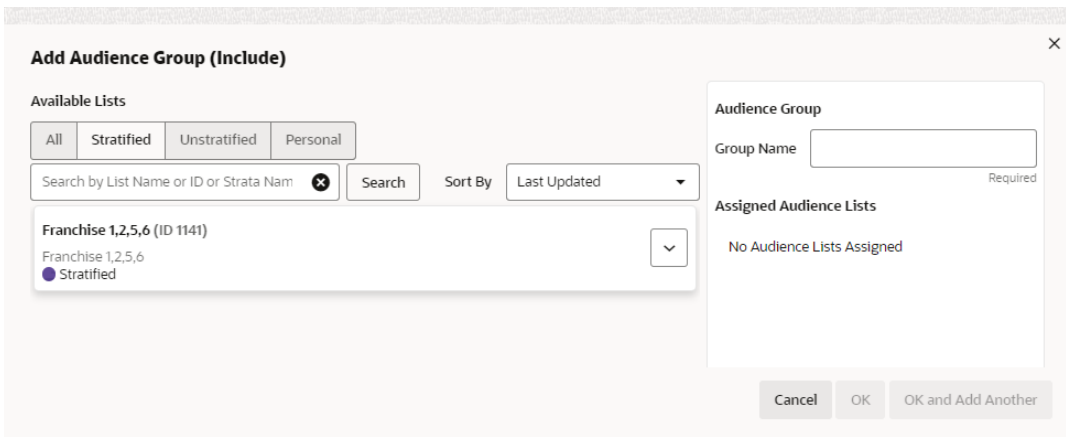
   Name

   Customer Count

e. Enter a **Group Name**.

When lists are added from the Available Lists area, they appear in the Audience Groups section of the window. The Audience Group section Group Name automatically defaults to the name of the first list added. You can change the Group Name to something more meaningful to describe the group of customers, if desired.

Figure 6-95 Add Audience Group (Include)

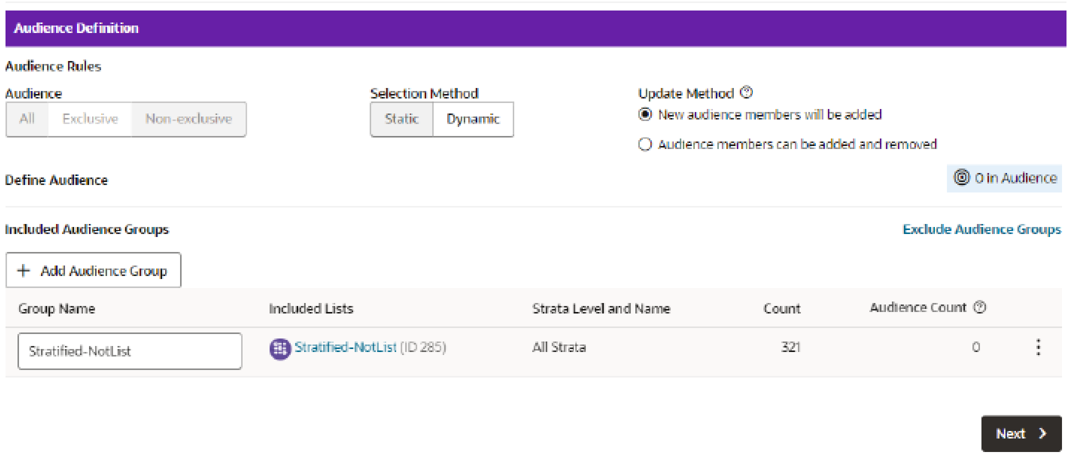


a. Click **Add** to add the selection Assigned Audience Lists.

b. Click **Add** for another list means you are using the condition AND. Both conditions must be met.

c. Click **OK and Add Another** to keep you in the same window and use the condition **OR**. One or more of the conditions must be met when you click **Add** for another Audience Group.

Figure 6-96 Audience Definition



As shown in the figure above, the Group Count is shown for each audience group. In the Audience Rules section the total count is provided on the right hand side.

Columns include the following details:

- Group Name
- Included Lists
- Strata Level and Name
- Count
- Audience Count

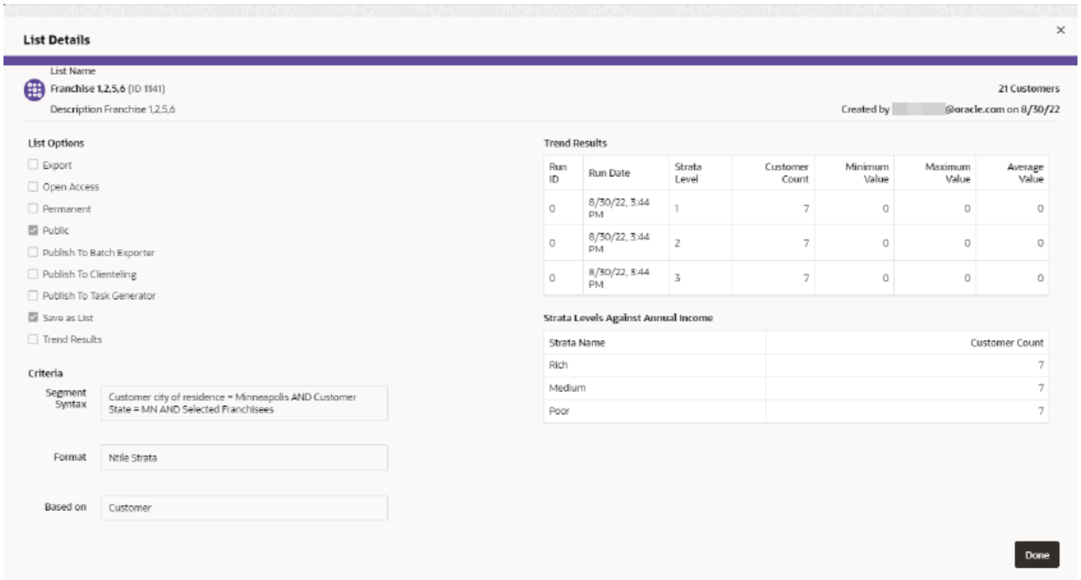
Each Group Name has an Overflow Menu Icon where you can Edit or Remove the Audience Group from the list.

The Included Lists column displays a link on that list (also known as a segment) and that link will open to the Audience List Details window.

In this window, the following sections may display, depending on the type of list and which of the options were selected when the list was created:

- List Options section
- Criteria section
- Trend Results section
- Strata Levels section
- Attributes section
- Franchisees section
- Message section
- Scheduled Jobs section

Figure 6-97 List Details



The checked List Options vary by the selections made when the list was created, and may include the following fields:

- **Export** – Indicates whether the Segment list is automatically exported after the Segment Query is run.
- **Open Access** – Indicates whether the Segment has Open Access.
- **Permanent** – Indicates whether the Segment is kept in the system, even if it meets the criteria for deletion by the housekeeping job.
- **Public** – Indicates whether the Segment is Public.
- **Publish to Batch Exporter** – Indicates whether the Segment has been made available for export to a Marketing system.
- **Publish to Clienteling** – Indicates whether the Segment has been made available to the Clienteling module.
- **Publish to Task Generator** – Indicates whether the Segment has been made available to the Task Generator Job.
- **Save as List** – Indicates whether a list of matching Customer IDs is created when the Segment is created.
- **Trend Results** – Indicates whether the results of the Segment run are kept to provide trend information about the Segment.

Figure 6-98 displays the Trend Results in a chart. A user can scroll down to see a table as shown in Figure 6-99, which for this segment shows the Strata Levels Against Customer Age and displays the strata that are shown in the graph.

Figure 6-98 List Details Trend Results - Chart

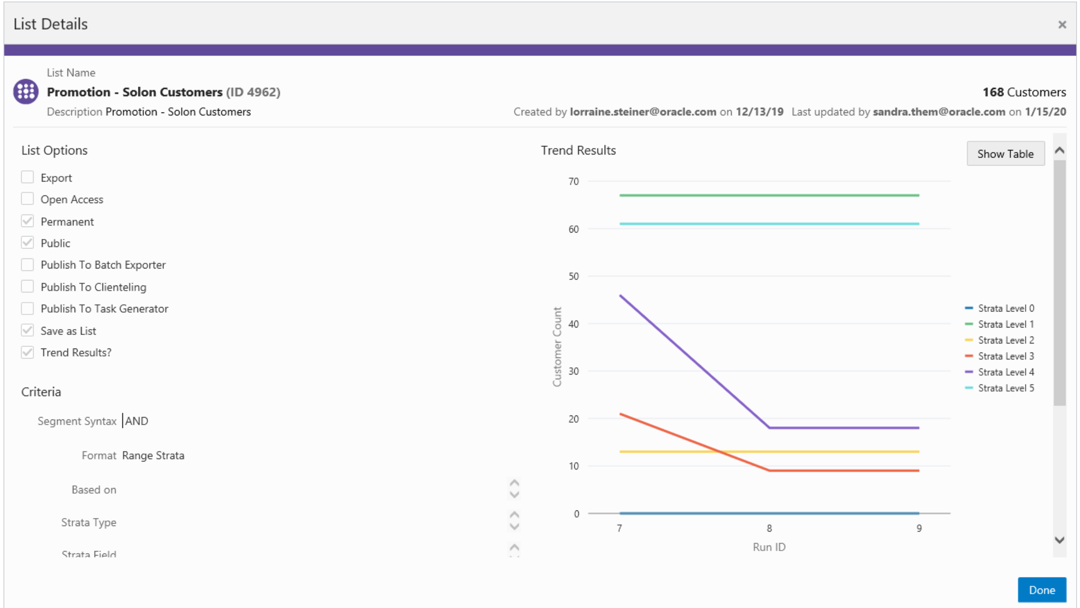


Figure 6-99 Trend Results Graph - Table

Trend Results

Show Chart

Run ID	Run Date	Strata Level	Customer Count	Minimum Value	Maximum Value	Average Value
95	1/29/21, 1:00 AM	1	99	0	0	0
95	1/29/21, 1:00 AM	2	92	0	0	0
95	1/29/21, 1:00 AM	3	93	0	0	0
94	1/27/21, 4:36 AM	1	99	0	0	0
94	1/27/21, 4:36 AM	2	92	0	0	0
94	1/27/21, 4:36 AM	3	93	0	0	0

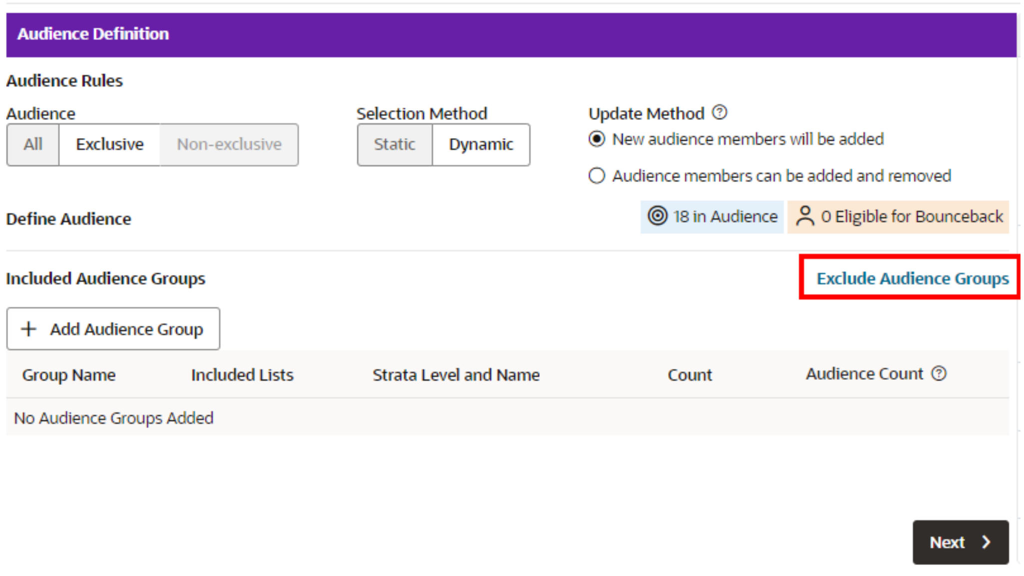
Figure 6-100 List Details Trend Results - Table

Strata Levels Against Annual Income

Strata Name	From (>=)	To (<)	Customer Count
Strata 1	0	50	2,216,204
Strata 3	51	>	6,858

- Click **Done** to close the Audience List Details window.

Figure 6-101 Audience Definition - Exclude Audience Groups



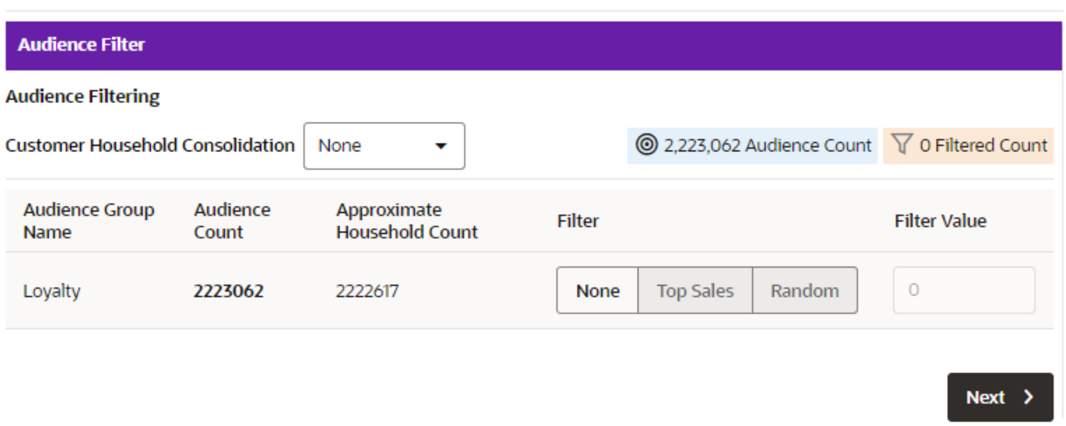
Exclude Audience Groups - If you wish to exclude certain groups of customers that may also be a part of the Included Group, you can do that by selecting the **Exclude Audience Groups** link, which opens a new section in the Audience Definition window

- Select the **Exclude Audience Groups** link.
- Click **+ Add Audience Group**.
- Select an Available List type.
- – **All** – Default group listing.
  – **Stratified** – The Customers within a Stratified list are divided into levels.
  – **Unstratified** – The Customers within an Unstratified list are not differentiated into separate groups.
  – **Personal** – User created groups.
- In the Search field, enter some or all of the **List Name**, **ID**, or **Strata Name**.
- Click **Search**.

- The results can be sorted by using the **Sort by list** menu with the following options:
  - Last Updated
  - Name
  - Customer Count
- Enter a **Group Name**.
- Click **Add** to add the selection Assigned Audience Lists.
- Click **Add** for another list means you are using the condition **AND**. Both conditions must be met.
- Click **OK and Add Another** to keep you in the same window and use the condition **OR**. One or more of the conditions must be met when you click **Add** for another Audience Group.

17. When finished entering all Audience Groups for the Promotion, click **Next**.
    - If the Selection Method selected in **Step 16**, is Static, continue to the next tab, the **Filtering Audience** tab.
    - If the Selection Method selected in **Step 16** is Dynamic, continue to **Step 22**, the **Control Groups** tab.
18. Enter the following for the **Filtering Audience** tab.

Figure 6-102 Filtering Audience Tab

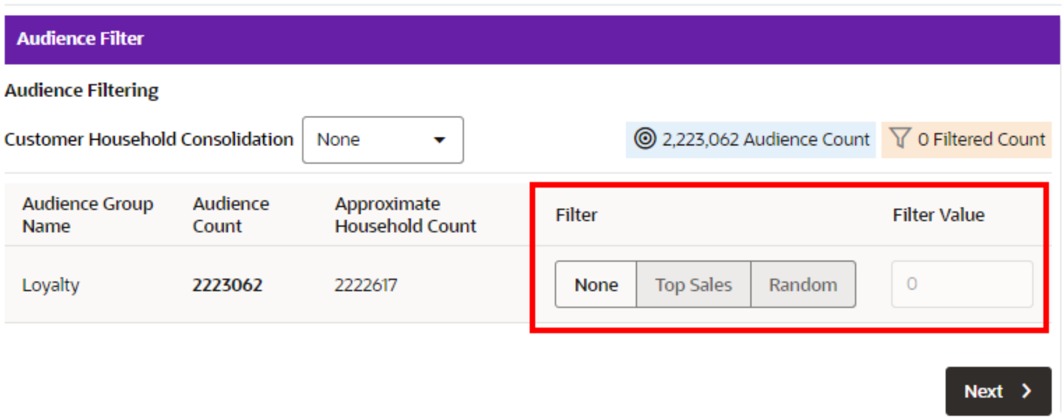


Use the **Customer Household Consolidation Selection Menu** to indicate whether the Promotion will use household consolidation, and the rule for determining the Customer who is the head of household.

- **None** – Do not perform household filtering.
- **LT Sales** – Select head of household based on amount purchased over the lifetime of their account.
- **LT Transaction Count** – Select head of household based on lifetime number of transactions.
- **Last Transaction Date** – Select head of household based on the Customer who performed the most recent transaction.
- **Customer Attributes** – Select head of household based on the Customer's numeric attributes.

Select the **Filter Type** for each Audience:

Figure 6-103 Select Desired Filtering

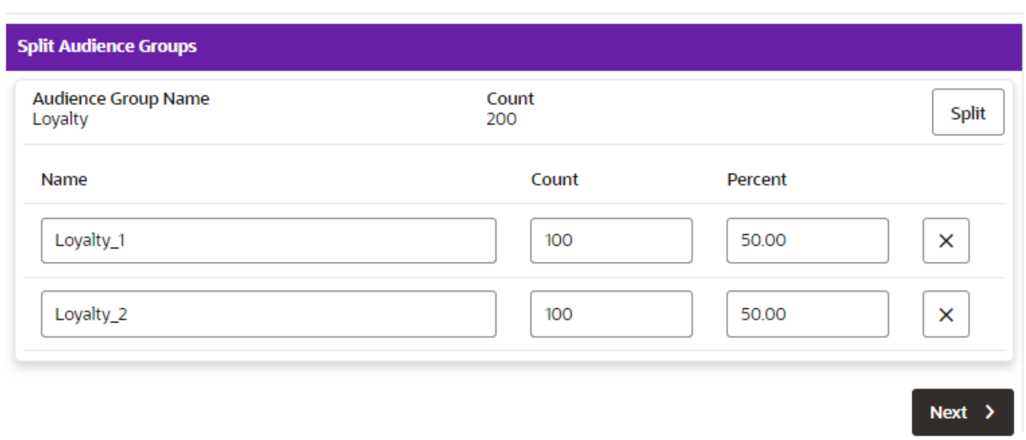


- **None** - [DEFAULT] All Customers in the Audience Group are eligible.
- **Top Sales** - Customers from the Audience Group will be chosen for eligibility by the greatest total amount of purchases.
- **Random** - Customers from the Audience Group will be chosen randomly for eligibility.

Enter a **filter value** to indicate the number of customers eligible for the promotion.

19. When finished entering any household filtering for the Audience Groups for the Promotion, click **Next** to continue to the **Split Audience** tab.
20. In the Split Audience tab, filtered audiences can, optionally, be split into smaller, separate audiences. If desired, create splits for the filtered audiences on the promotion.
    - Click **Split**.

    Figure 6-104 Split Audience Groups

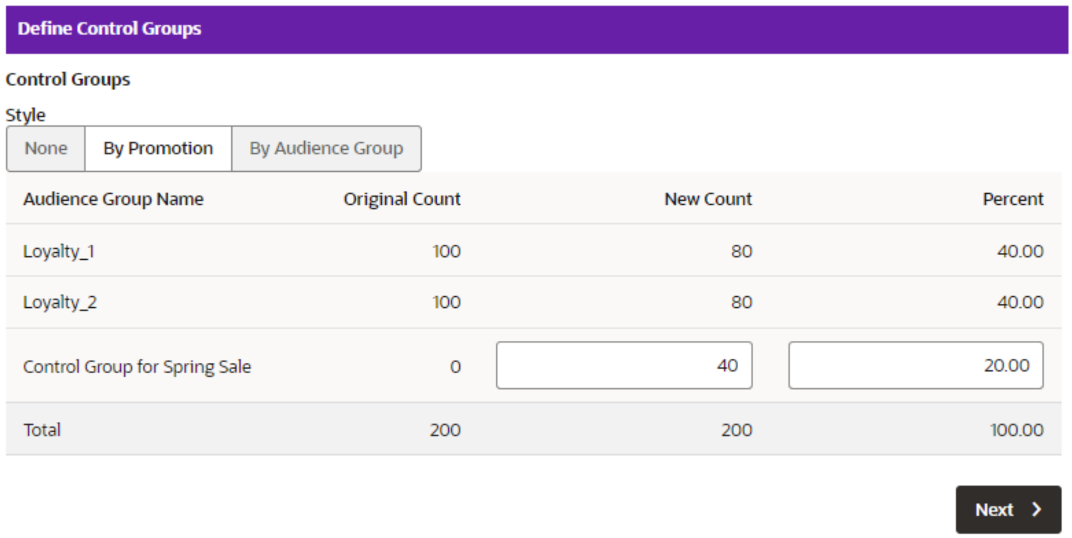
    

    - The Split Name field is automatically populated from the name of the Audience Group Name. If desired, you can change the name of the splits in this step.

- Select **Split** to automatically divide the Audience Group into equal portions and percentages. If you desire different portions or percentages for the splits, enter either a count or a percentage, and the corresponding field will update.

21. When finished entering any Audience Group splits for the Promotion, click **Next** to continue to the **Control Groups** tab.
22. Enter the following information for the **Control Groups** tab.

Figure 6-105 Define Control Groups

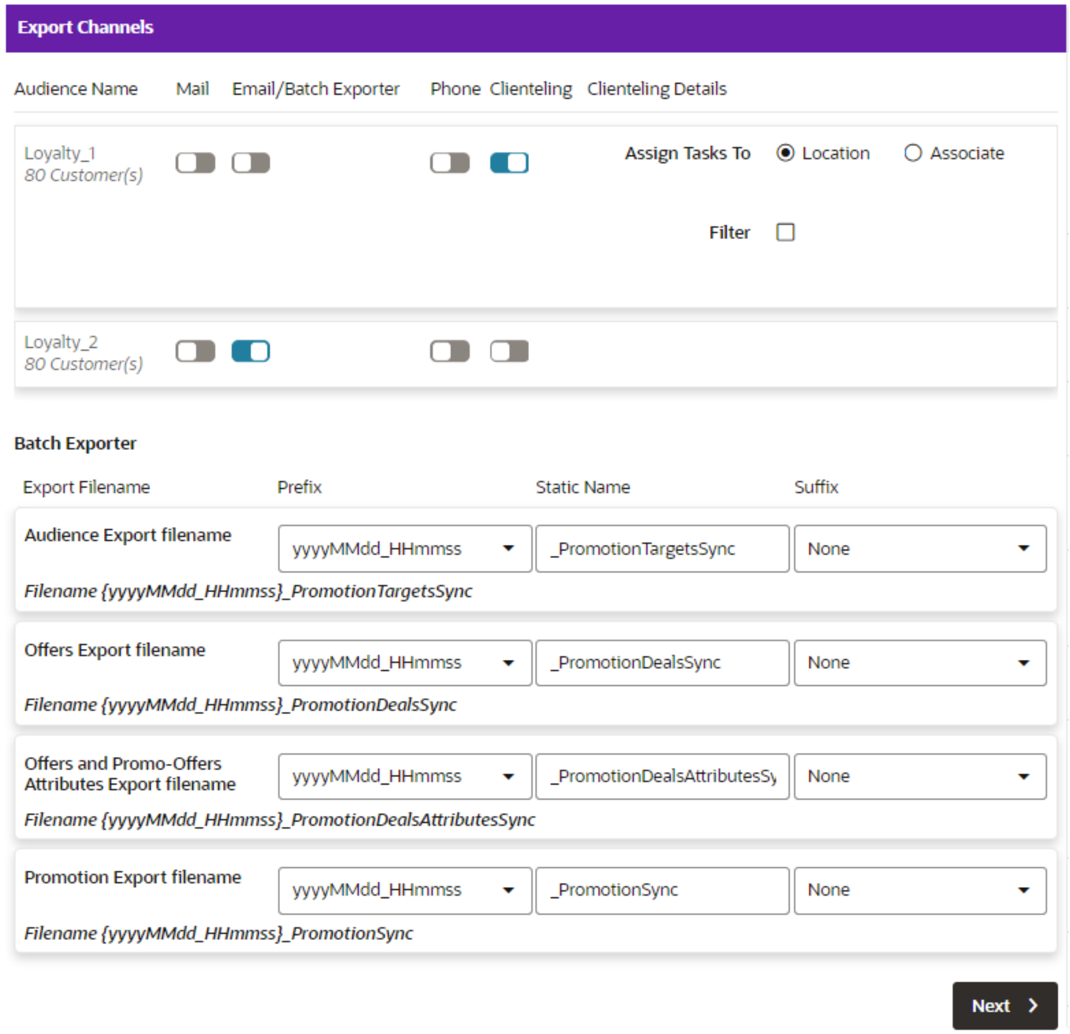


The control group is a statistically identical group that doesn't receive the offer. Following the promotional period, the results of the two groups are compared and you can determine if the offer generated incremental revenue. Options include:

- **None** – No Control Group
- **By Promotion** – Enter either a New Count or Percent. The corresponding field will update automatically to determine the size of the control group.
- **By Audience Group** – Enter either a Control Group count or percentage for each split created earlier. The corresponding field will update automatically.

23. When finished entering any Control Groups for the Promotion, click **Next** to continue to the **Export Channels** tab.
24. Enter the following information for the **Export Channels** tab. The options include:

Figure 6-106 Export Channels Tab



Mail - Determines whether the Customers in the Split/Control Group will be contacted by Mail.

EMail / Batch Exporter - Determines whether the Customers in the Split/Control Group will be contacted by Email.

> **Note:**
>
> The system configuration setting *SupportedBatchExporters* determines if the Batch Exporter section is displayed.

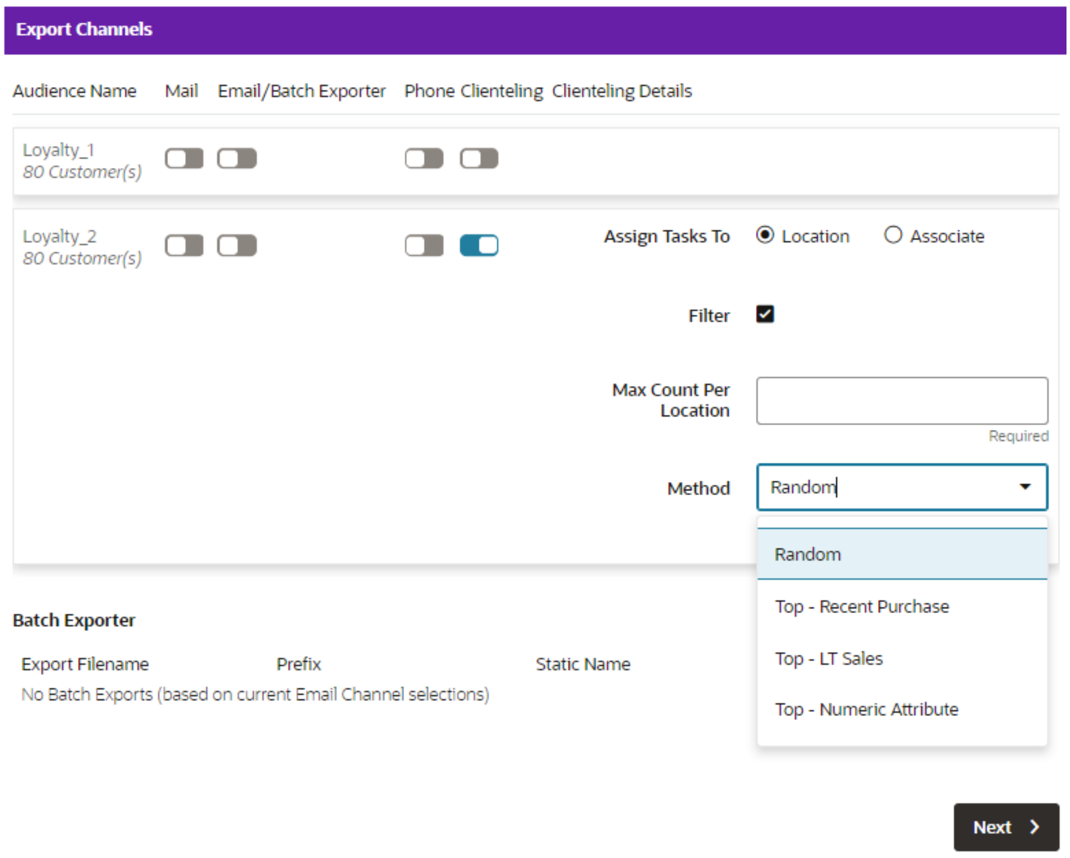
- Export Filename – Name of the file.
- Prefix – Indicates the format of the datetime stamp used as a prefix the filename. Optional. Possible settings are yyyyMMdd_HHmmss, yyyy-MMdd_HHmmss, or none.
- Static Name – The identifying filename.

- Suffix – Indicates the format of the datetime stamp used as a suffix the filename. Optional. Possible settings are yyyyMMdd_HHmmss, yyyy-MMdd_HHmmss, or none.
- Filename – Displays an example of the export file name with the prefix and suffix format, if any.

Phone - Determines whether the Customers are contacted by phone.

Clienteling – When the Clienteling switch is turned on, tasks will be created based on the assigned associates or locations for the defined target audience when the promotion is generated.

Figure 6-107 Clienteling Details



Assign Tasks to:

- **Location Channel** – Tasks are assigned to a Location.
- **Associate Channel** – Tasks are assigned to an associate in a location.

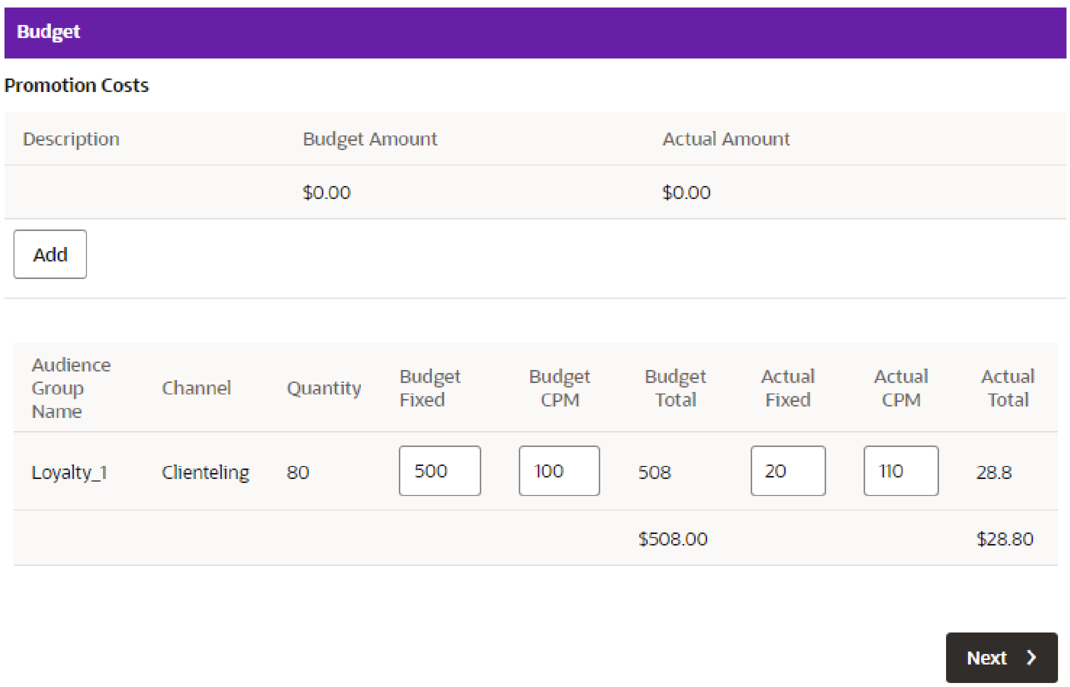
The following fields are enabled if the Filter option is selected:

- **Max Count Per <type>** - Determines the maximum number of target Customers that will be contacted through the channel.
- **Method** - Method used to select the Customers contacted. Options include:
  - **Random** - Select Customers Randomly (Default).
  - **Top - Recent Purchase** - Filter the Customers based on the most recent purchases.

- **Top - LT Sales** - Filter the Customers based on the largest amount purchased over the lifetime of their account.
- **Top - Numeric Attribute** - Filter the Customers based on the highest attribute value for a selected numeric attribute. If this option is selected, an additional Channel Filter option, Attribute, displays. Attribute is the numeric attribute used to determine the customers contacted

25. When finished entering any Export Channels for the Promotion, click **Next** to continue to the **Budget** tab.
26. Enter the following information on the **Budget** tab.

Figure 6-108 Budget Tab



a. Click **Add** to enter the Promotion Costs. Enter values in any field is optional.
b. Enter a **Description** of the cost item.
c. Enter the **budgeted amount** for the Promotion in the Budget Amount field.
d. Enter the **actual amount** for the Promotion in the Actual Amount field.
e. Click **Add** if you wish to enter another budget line for the promotion, then follow **steps a-d** to complete the fields.

   If Export Channels were selected for the audience group, the Audience Groups Costs section appears. Entering values in any field is optional.

Figure 6-109 Audience Group Costs

Audience Group Name	Channel	Quantity	Budget Fixed	Budget CPM	Budget Total	Actual Fixed	Actual CPM	Actual Total
Loyalty_1	Clienteling	80	500	100	508	20	110	28.8
Loyalty_2	Email	80			0			0
					$508.00			$28.80

f. In the Budget-Fixed field, enter the **fixed cost budgeted** for the audience.

g. In the Budget-CPM field, enter the **cost budgeted** for the Channel for each 1,000 Customers.

h. In the Actual-Fixed field, enter the **actual fixed cost** of the Channel.

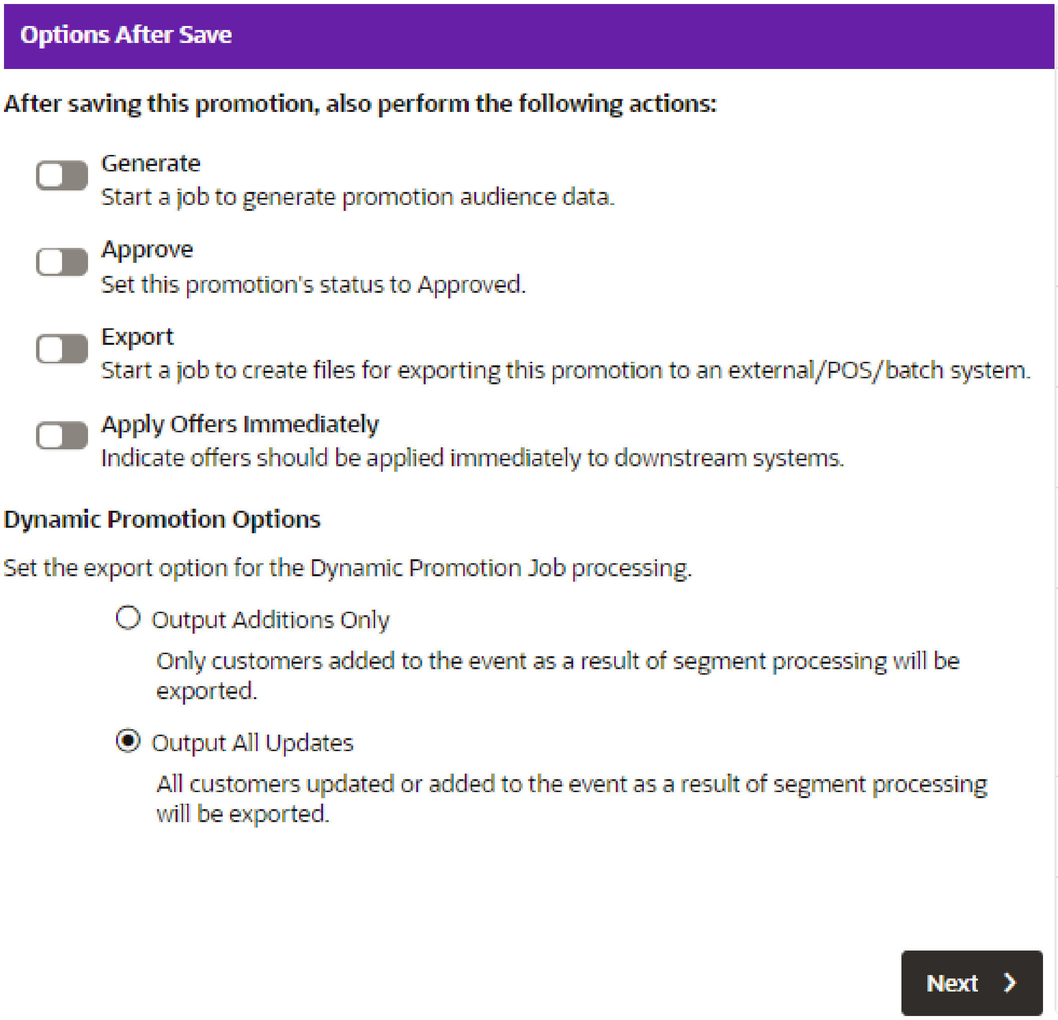
i. In the Actual-CPM field, enter the **actual cost** of the Channel for each 1,000 Customers.

j. Repeat **steps f-i** for each Target Channel in the Promotion.

27. When finished entering any Budget Costs for the Promotion, click **Next** to continue to the **Save Options** tab.

28. Enter the following information in the **Save Options** tab. You can enter more than one choice.

Figure 6-110 Options After Save Tab

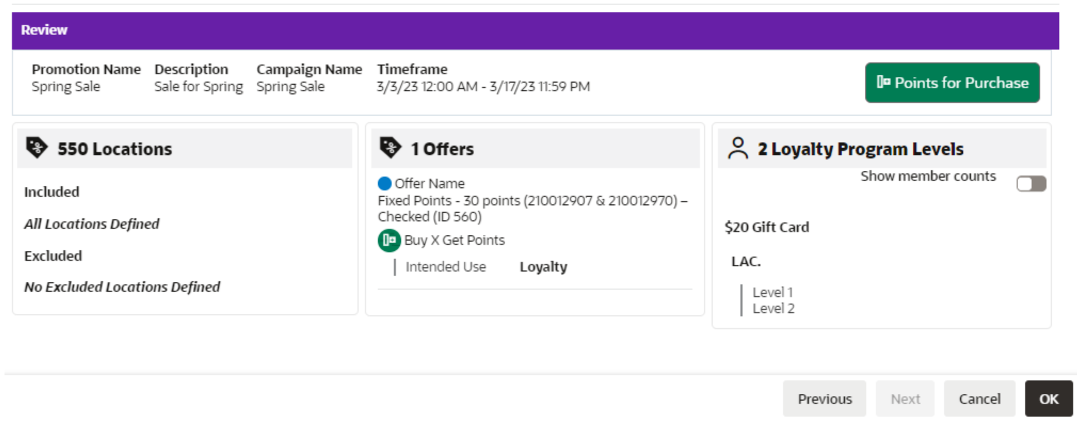


- Generate – Start a job to generate promotion audience data.
- Approve – Set this promotion's status to Approved.
- Dynamic Promotion Options – Select one of the two export options for processing when using the Dynamic selection method on the Audience tab.

> **Note:**
>
> Depending on the type of promotion that you created, different Options After Save are available.

29. When finished entering any Save Options for the Promotion, click **Next**.
30. The **Review** tab displays the key elements in the Promotion Setup.

Figure 6-111 Review Tab



31. Click **OK** to save the Promotion, or click **Cancel** to close the promotion without saving. Click **Previous** or any **Tab** to return to any point of the Create Promotion process.

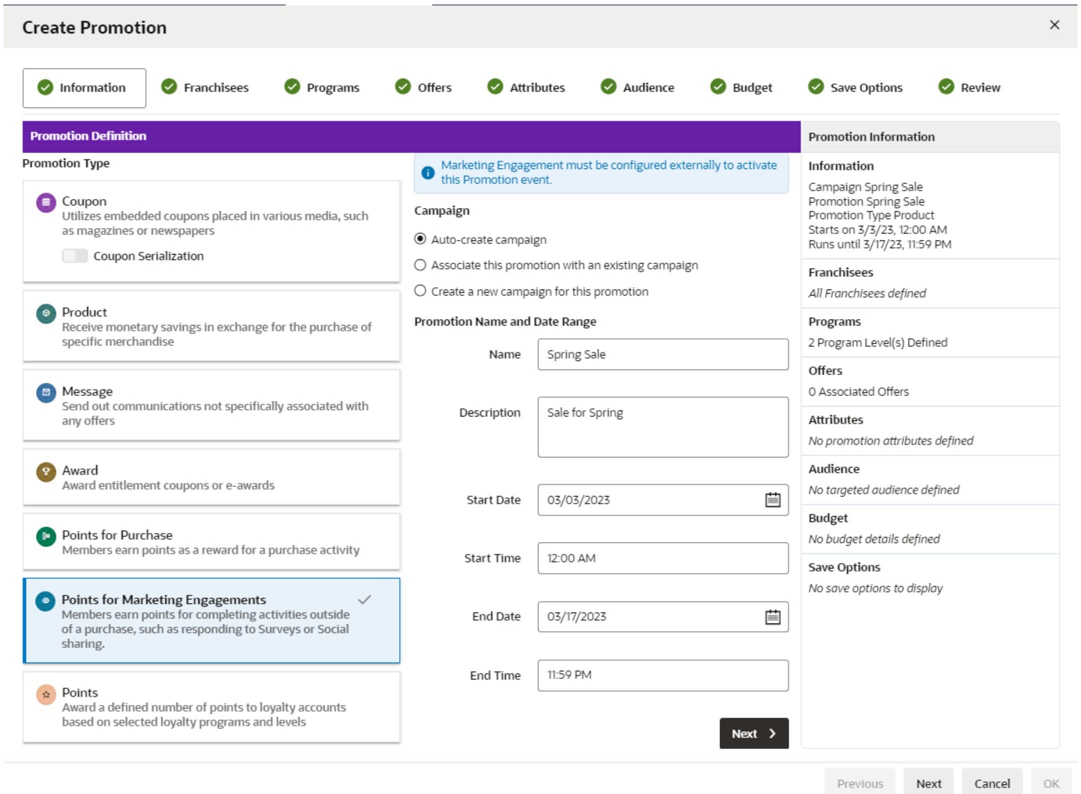
Creating a Points for Marketing Engagements Promotion

There are a few choices available to start the process of creating a promotion. The **Create Promotion** button is available in both the Promotion Home window as well as the Promotion Search window.

> **Note:**
>
> You will need the Promotion Home role to access the Promotion Home window.

1. Click **Create Promotion**, which opens up the Promotion wizard to the Information tab.

Figure 6-112 Information Tab - Points for Marketing



2. Select the **Promotion Type**: Points for Marketing Engagements.

> **Note:**
>
> Contact your administrator if you do not see the Promotion Types needed for your promotion

3. Select one of the choices for the Campaign.
   - **Auto-create Campaign** – The campaign is automatically created and will use the same name and description from the promotion name and description.
   - **Associate this promotion with an existing campaign** – Uses existing campaigns in the system.
     – Click the list arrow and select an **existing campaign**.

     > **Note:**
     >
     > The Start Date and End Date display underneath the Existing Campaign list.

   - **Create a new campaign for this promotion** – A new campaign is created with this promotion being the first added.
4. Enter the following information:
   - Enter a **Campaign Name** (for new Campaigns only).

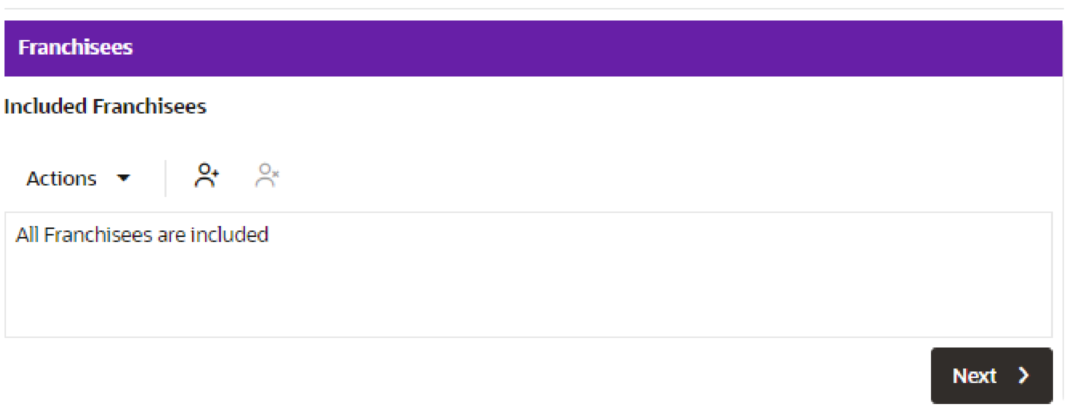
- Enter a **Description** (for new Campaigns only).
- Enter a **Name**.
- Enter a **Description**.
- Select a **Start Date**.
- Select a **Start Time**.
- Select an **End Date**.
- Select an **End Time**.

5. When finished entering the Campaign and Promotion information, click **Next** to continue to the **Franchisees** tab.

> **Note:**
>
> This tab will only display if the `EnableFranchiseSupport` configuration is enabled, and Franchisees have been created.

6. By default, all franchisees are assigned to the promotion. To make changes to those assignments, do the following:

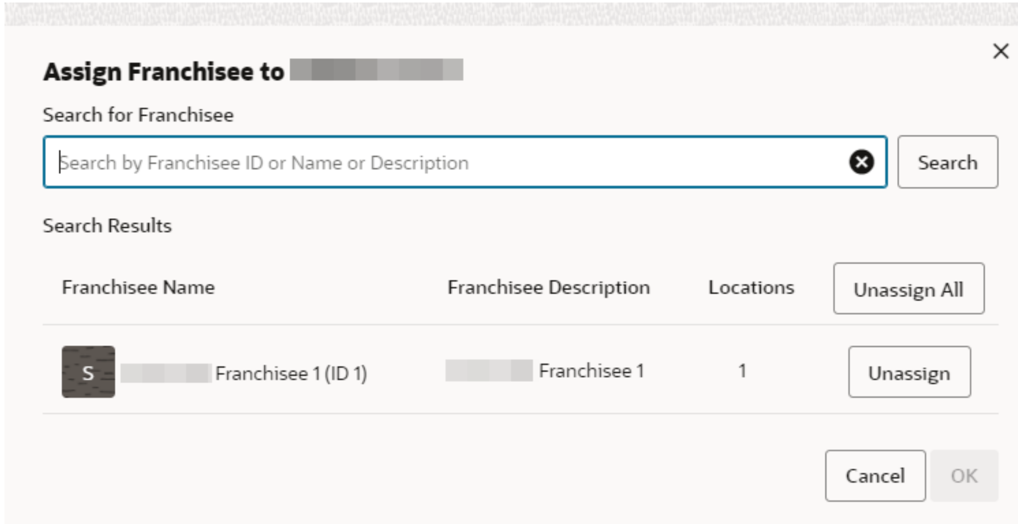
Figure 6-113 Franchisees Tab



Assigning a Franchisee

a. Click the **Actions Menu**, then, click **Assign**, or click the **Add (+)** icon. This opens the Add Franchisee window.

Figure 6-114 Assign Franchisee



b. In the Search for franchisee search box, enter part or all of the **Name**, **ID**, or **Description**, then click **Search**.

> **Note:**
>
> You can also leave blank and click Search to return all Franchisees.

c. To change the assignment from ALL (which is defaulted) click **Assign** on just the specific franchisees you wish to assign for this promotion. Only Franchisees associated with the user are displayed in the list.

d. Click **OK** to accept the changes or **Cancel** to close the window without saving.

Figure 6-115 Confirmation Notification

> **Note:**
>
> A confirmation notification appears to confirm the franchisee has been assigned.

Deleting a Franchisee

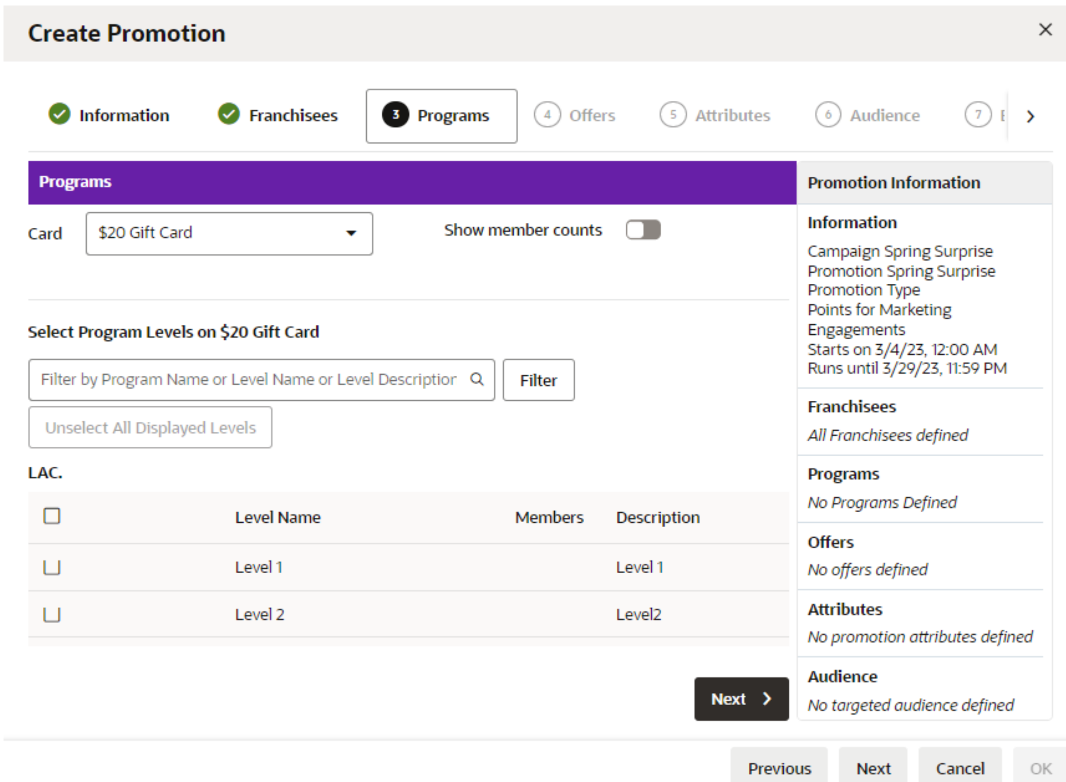
a. In the included Franchisees window, highlight the desired **row**.

b. Click the **Action Menu**, and click **Delete**, or click the **X** icon.

> **Note:**
>
> A confirmation notification appears to confirm the franchisee has been deleted.

7. When finished entering the Franchisees information, click **Next** to continue to the **Programs** tab.

Figure 6-116 Programs Tab



8. To begin the Programs tab, take the following actions:

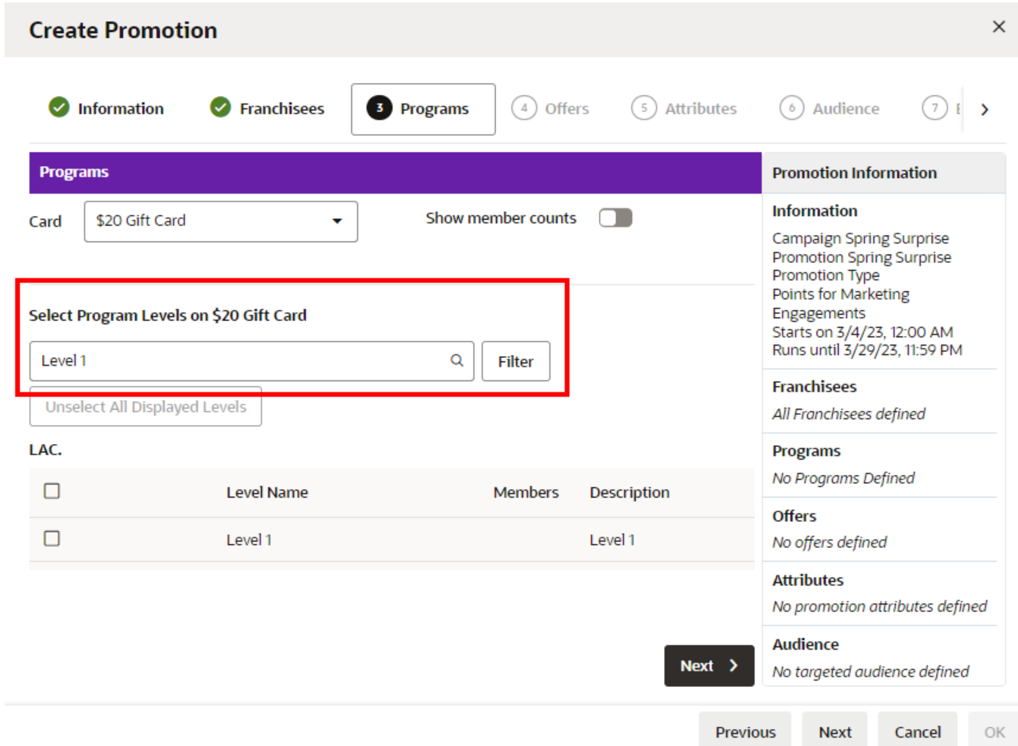
   a. Select a **Card**.

      A list of cards display all active cards for the user to select from. If there is only one card to select from, the card appears by default and the list arrow is unavailable for selection.

      > **Note:**
      >
      > The Select Program Levels section title will contain the name of the card selected.

   b. In the Filter for **Select Programs Levels on** field, enter all or part of the **Program Name**, **Level Name**, or **Level Description** of the specific loyalty program you want to search for.

Figure 6-117 Filter Results



c. Select one or more **Loyalty Programs**. The Deselect All Displayed Levels button clears all selections.

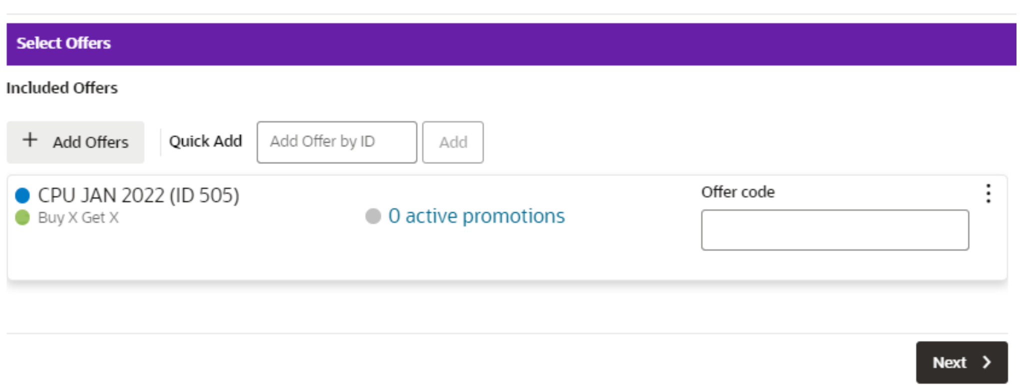
9. When finished selecting Loyalty Programs for the Promotion, click **Next** to continue to the **Offers** tab.

10. To begin the Offers tab, take the following actions:

    There are two methods to add offers, either:

    - Select the **Quick Add** option to search for a known Offer ID.
    - Click **+Add Offers** for an Advanced Offer Search.

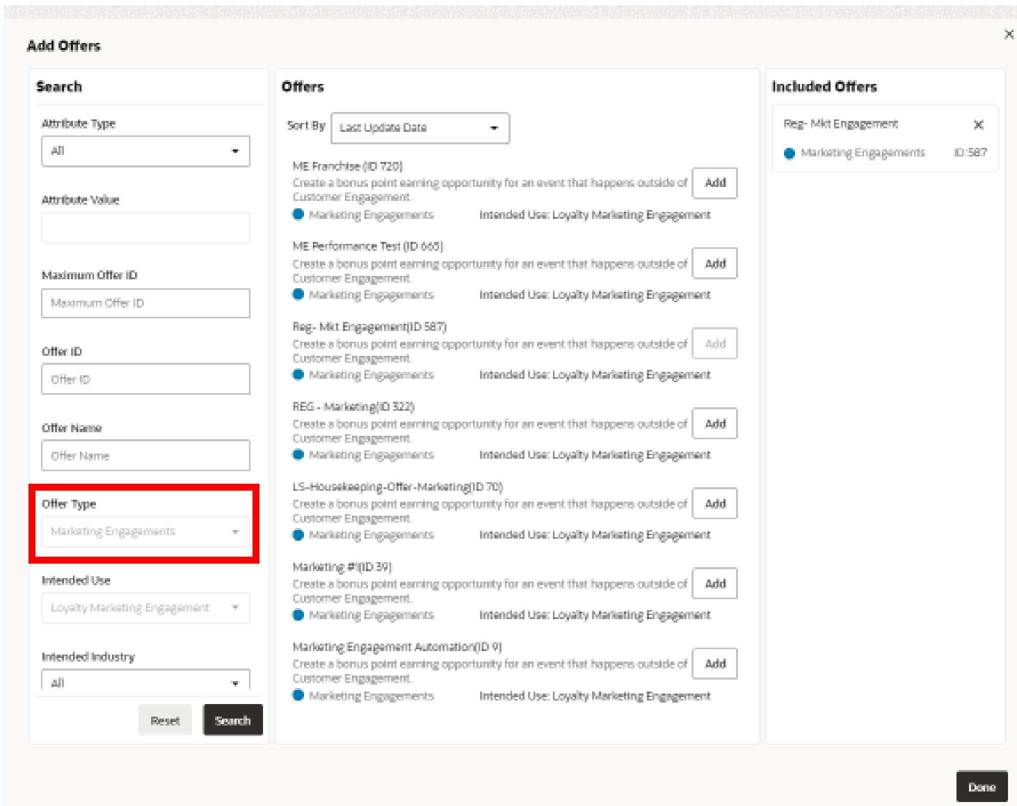
Figure 6-118 Offers Tab



> **Note:**
>
> Refer to Figure 6-118 to enter the Offer Code field. A retailer can use it to qualify or track a particular offer.

- Click **+ Add Offers**. The Add Offers window enables you to search for offers to include in the promotion. Once you receive the results of the search you can sort the results, if desired for easier selection, before adding them to the promotion. Those offers appear in the Included Offers panel.

Figure 6-119 Add Offers - Marketing Engagements



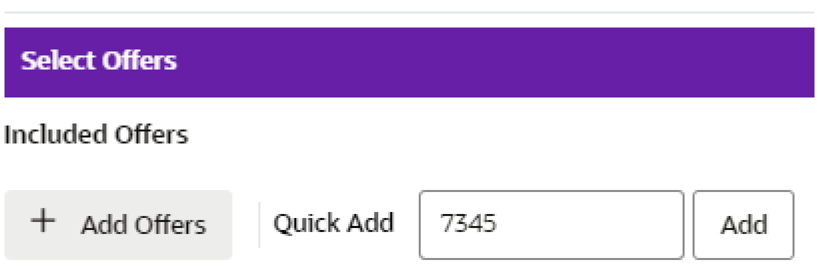
- In the Search section, enter any or all of the following information:
  - **Attribute Type** – Search for an Offer by the Attribute assigned to the Offer. The default is ALL.
  - **Attributes Value -** Type-ahead search according to the Attribute Type selected.
  - **Maximum Offer ID** – Highest Offer ID number you wish to limit the search to. This will return that offer ID and all others with a lower number.
  - **Offer ID** – This Text Field searches all the Offers currently present in the application. The default is an empty field.
  - **Offer Name** – Name of the Offer.
  - **Offer Type** – Search the Offer by Offer Type (Single Select). The value **Marketing Engagements** is populated in the list of options.
  - **Intended Use** – The type of Promotion associated with the Offer you are searching for. The value **Loyalty Marketing Engagement** is populated.

- Click **Search**.

> **Note:**
>
> To retrieve all the offers in the system, select Search without entering any search criteria. All offers are returned to the Offers results section. From there, you can scroll through the list to choose which offers to add.
>
> To clear the search fields and restore default selections in the search page, click **Reset**.

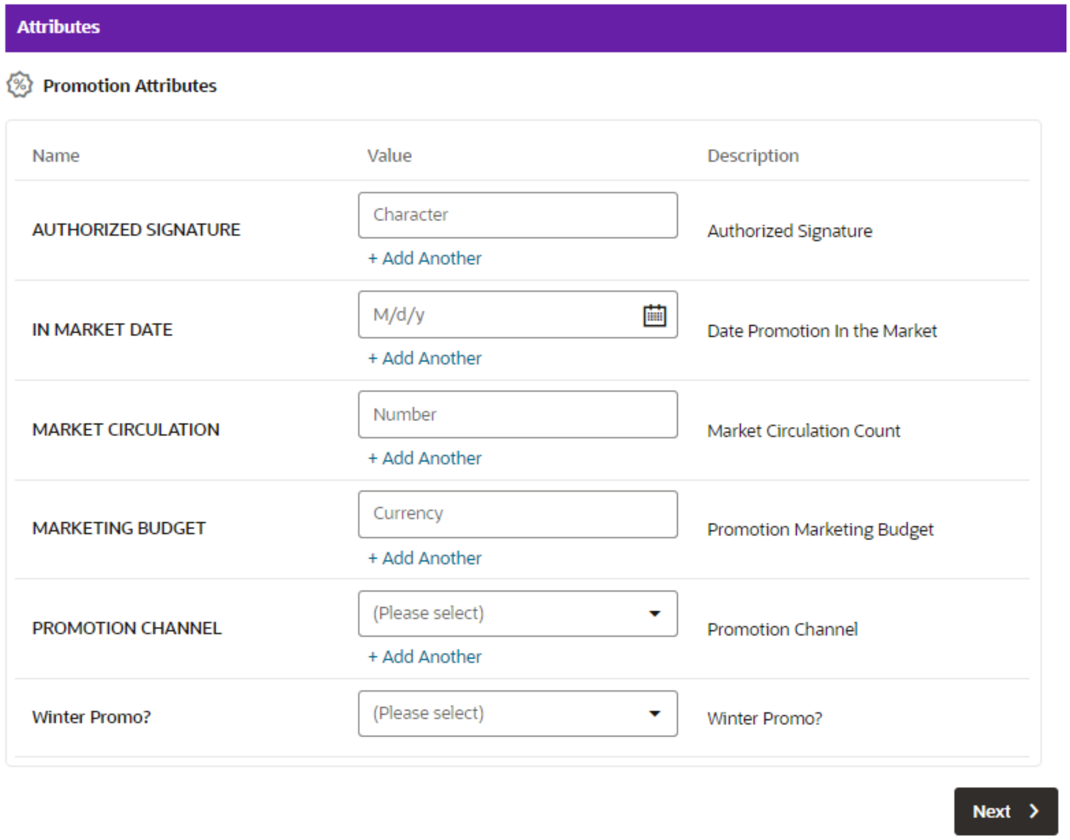
- Upon selecting **Search**, the results display in the Offers section. Use the **Sort by list** to sort by the following options:
  - Last Update Date
  - Offer Name
  - Offer Type
  - Intended Use
  - Offer ID
- In the Add Offers window, you can select any of the offers in the Include Offers section and remove them by selecting the **X** in the top right corner of the Offer. Click **Add** to include the offers in the promotion.
- When finished selecting offers to add to the Promotion, select **Done**, which returns you to the Select Offers window.
- On the Select Offers window, you can select the **Remove** option from the **Overflow Menu** to remove an offer from the promotion.
- Enter the **Offer ID** in the Quick Add field and then click **Add** to also add offers to a promotion.

Figure 6-120 Select Offers Quick Add



11. When finished entering Offers for the Promotion, click **Next** to continue to the **Attributes** tab.
12. Enter the following for the **Attributes** tab.

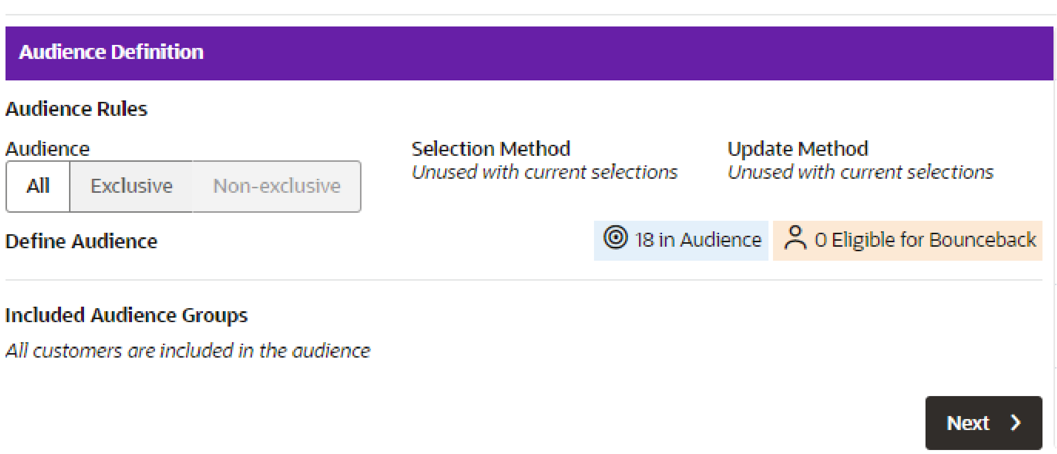
Figure 6-121 Promotion Attributes



- Complete values for any Promotion Attributes you want added to the promotion. Fields marked with an asterisk are required.

13. When finished adding Attributes for the Promotion, click **Next** to continue to the **Audience** tab.
14. Enter the following for the Audience tab.

Figure 6-122 Audience Tab



Audience Rules – **Exclusive** is only used here to define the audience.

Exclusive Targeting - If you create an exclusive targeted promotion, this means that only the customers you've identified in your target group are eligible to receive the promotion at the point of sale.

- Selection Method
  - **Static** – Only customers defined at this time are considered eligible for the promotion.
  - **Dynamic** – Dynamic can not only add customers but also remove customers that no longer apply. When Dynamic is selected, Update Method is available.

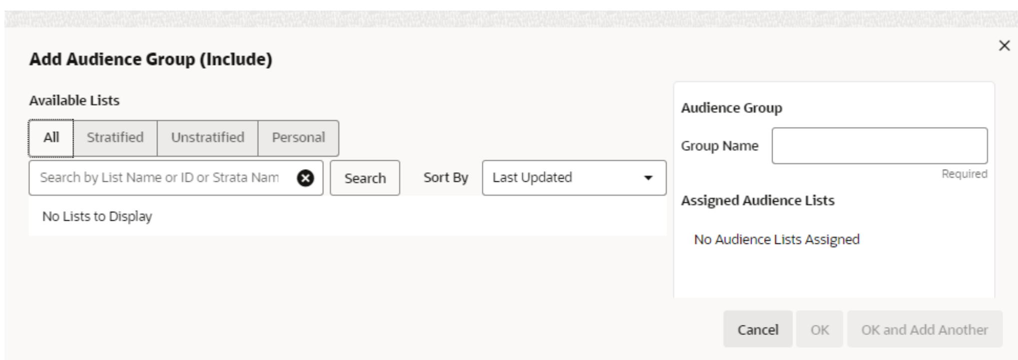
  New audience members will be added – When the Dynamic and Recurring Promotions job runs, any new customers found that meet the criteria, are added to the audience. All customers currently in the audience will remain in the audience.

  Audience members can be added and removed – When the Dynamic and Recurring Promotions job runs, any new customers found that meet the criteria, are added to the audience. Additionally, only the customers that meet the criteria will be included in the audience. If the customer is in the audience before the job runs, but no longer meets the criteria, the customer will be removed from the audience.

Define Audience - Included Audience Groups

a. Click + **Add Audience Group**.

Figure 6-123 Add Audience Group (Include)



b. Select an **Available List** type

   All - Default

   Stratified - The Customers within a Stratified list are divided into levels.

   Unstratified - Customers maintained by the user.

   Personal - Customers maintained by the user.

c. In the Search field, enter some or all of the **List Name**, **ID**, or **Strata Name**.

d. Click **Search**. The results can be sorted by using the Sort by list menu with the following options:

   Last Updated

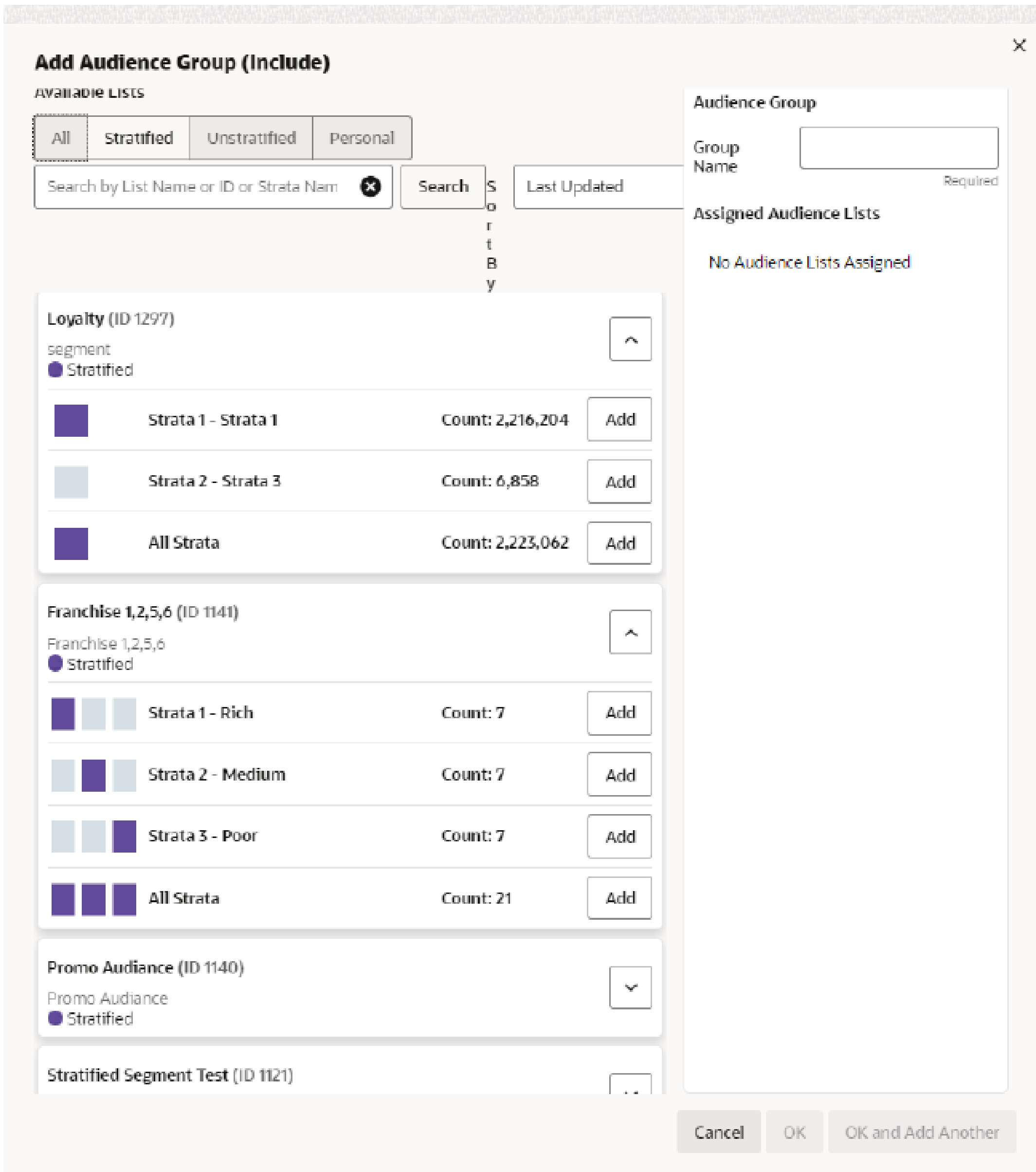
   Name

   Customer Count

e. Enter a **Group Name**.

When lists are added from the Available Lists area, they appear in the Audience Groups section of the window. The Audience Group section Group Name automatically defaults to the name of the first list added. You can change the Group Name to something more meaningful to describe the group of customers, if desired.

Figure 6-124 Add Audience Group (Include)

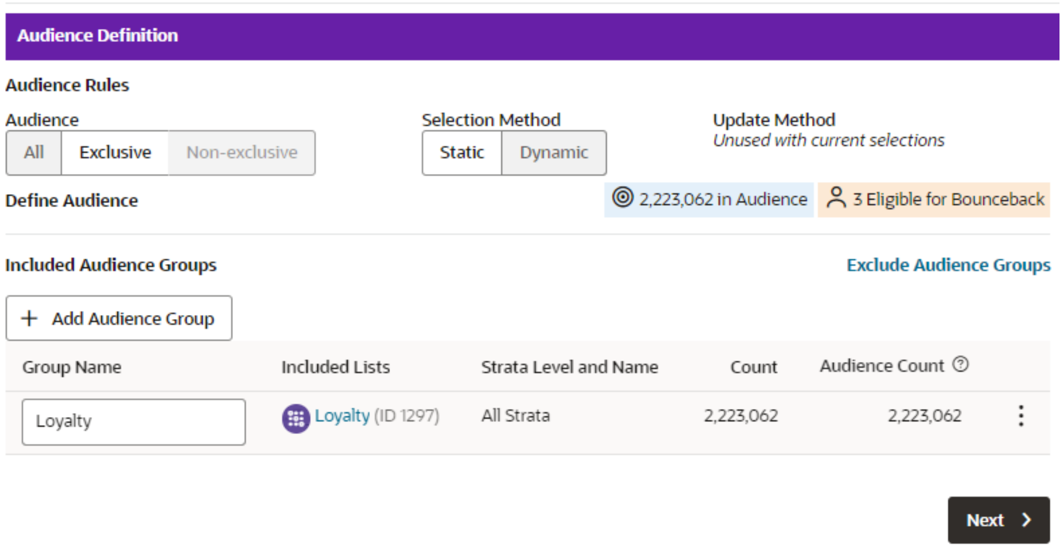


a. Click **Add** to add the selection Assigned Audience Lists.

b. Click **Add** for another list means you are using the condition AND. Both conditions must be met.

c. Click **OK and Add Another** to keep you in the same window and use the condition **OR**. One or more of the conditions must be met when you click **Add** for another Audience Group.

Figure 6-125   Audience Definition



As shown in Figure 6-125 the Audience Count is shown for each audience group. In the Audience Rules section the Audience count is provided on the right hand side.

Columns include the following details:

- Group Name
- Included Lists
- Strata Level and Name
- Count
- Audience Count

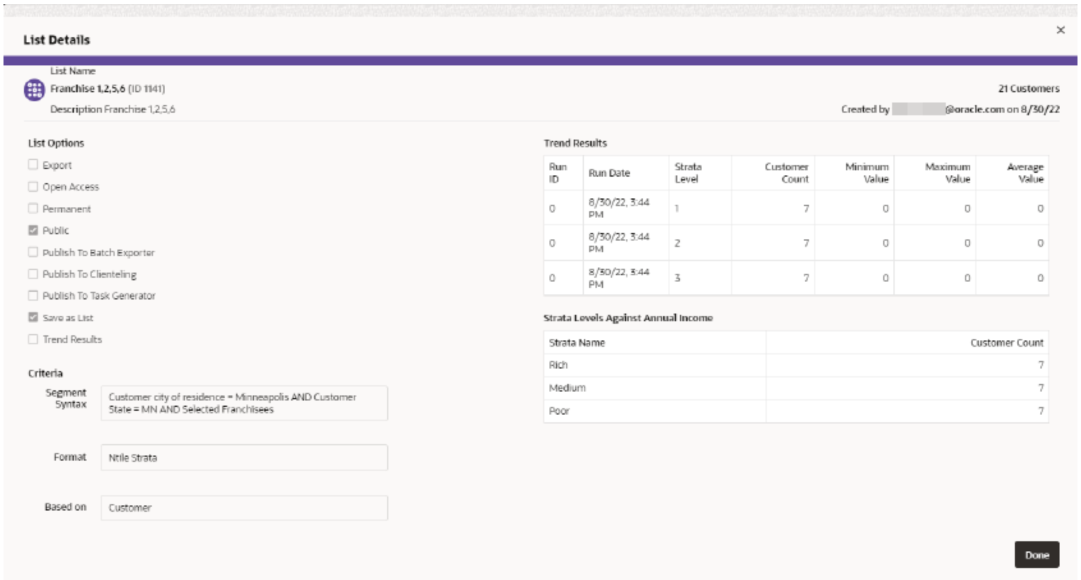
Each Group Name has an Overflow Menu Icon where you can Edit or Remove the Audience Group from the list.

The Included Lists column displays a link on that list (also known as a segment) and that link will open to the Audience List Details window.

In this window, the following sections may display, depending on the type of list and which of the options were selected when the list was created:

- List Options section
- Criteria section
- Trend Results section
- Strata Levels section
- Attributes section
- Franchisees section
- Message section
- Scheduled Jobs section

Figure 6-126   List Details



The checked List Options vary by the selections made when the list was created, and may include the following fields:

- **Export** – Indicates whether the Segment list is automatically exported after the Segment Query is run.
- **Open Access** – Indicates whether the Segment has Open Access.
- **Permanent** – Indicates whether the Segment is kept in the system, even if it meets the criteria for deletion by the housekeeping job.
- **Public** – Indicates whether the Segment is Public.
- **Publish to Batch Exporter** – Indicates whether the Segment has been made available for export to a Marketing system.
- **Publish to Clienteling** – Indicates whether the Segment has been made available to the Clienteling module.
- **Publish to Task Generator** – Indicates whether the Segment has been made available to the Task Generator Job.
- **Save as List** – Indicates whether a list of matching Customer IDs is created when the Segment is created.
- **Trend Results** – Indicates whether the results of the Segment run are kept to provide trend information about the Segment.

Figure 6-127 displays the Trend Results in a chart. A user can scroll down to see a table as shown in Figure 6-127, which for this segment shows the Strata Levels Against Customer Age and displays the strata that are shown in the graph.

Figure 6-127 List Details Trend Results - Chart

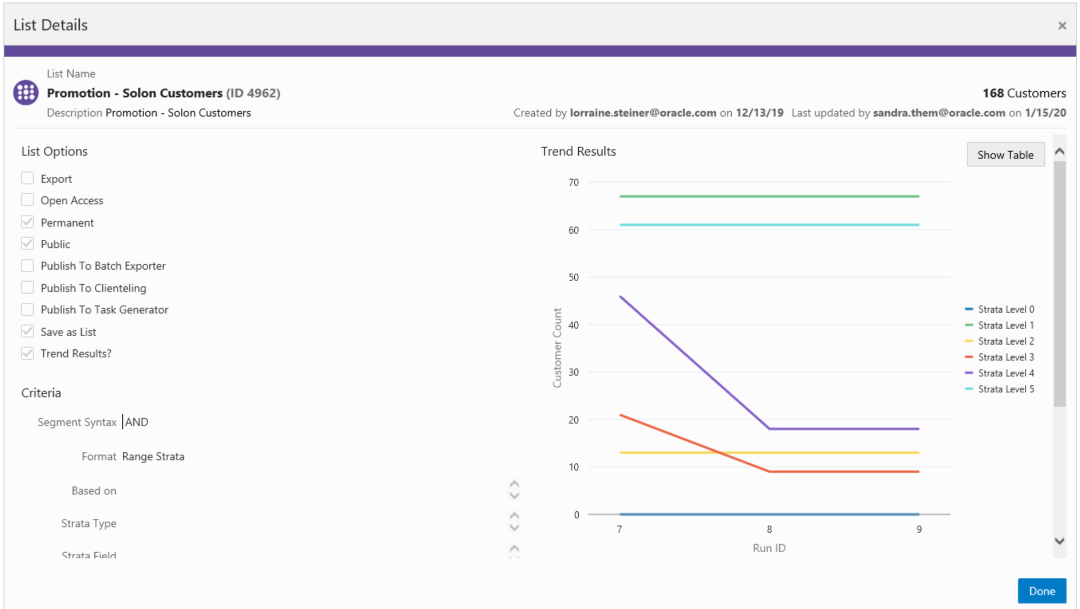
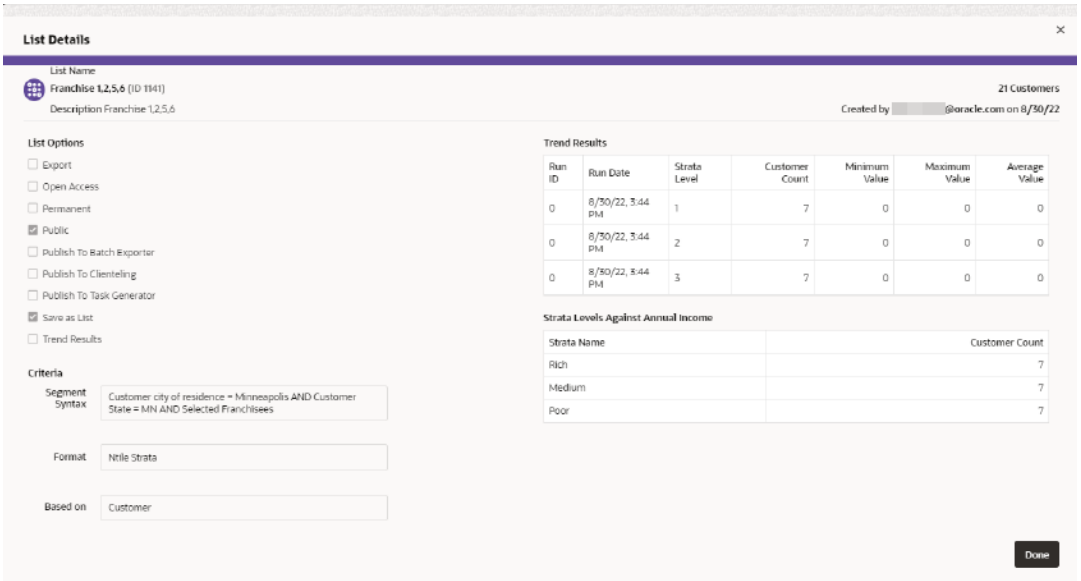


Figure 6-128 Trend Results Graph - Table

Trend Results Show Chart

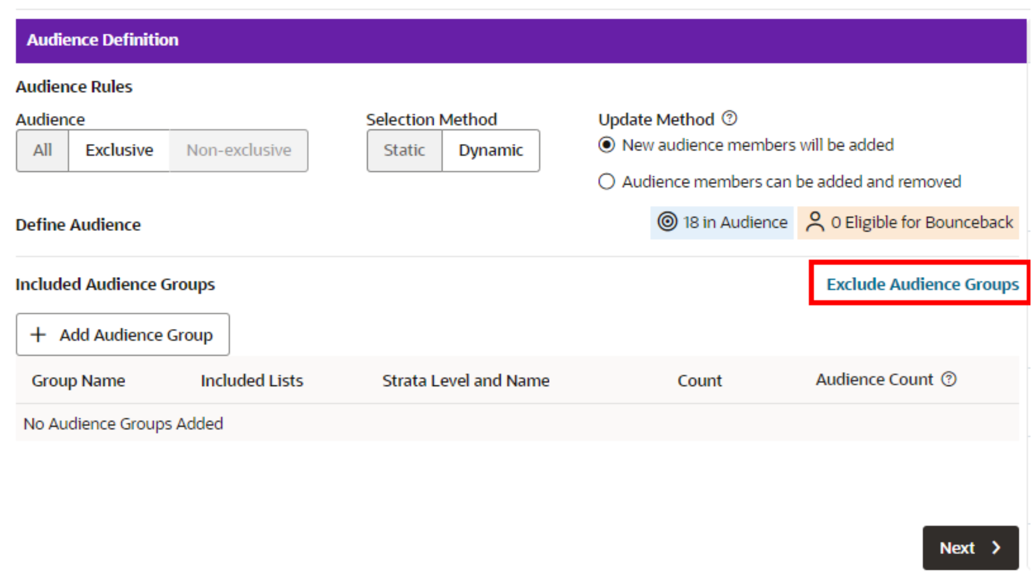
Run ID	Run Date	Strata Level	Customer Count	Minimum Value	Maximum Value	Average Value
95	1/29/21, 1:00 AM	1	99	0	0	0
95	1/29/21, 1:00 AM	2	92	0	0	0
95	1/29/21, 1:00 AM	3	93	0	0	0
94	1/27/21, 4:36 AM	1	99	0	0	0
94	1/27/21, 4:36 AM	2	92	0	0	0
94	1/27/21, 4:36 AM	3	93	0	0	0

Figure 6-129 List Details Trend Results - Table



- Click **Done** to close the Audience List Details window.

Figure 6-130 Audience Definition - Exclude Audience Groups



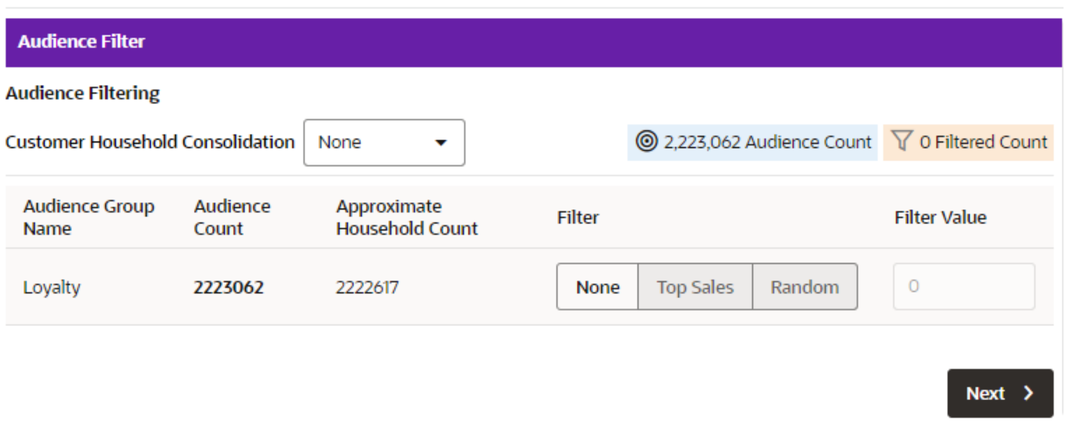
Exclude Audience Groups - If you wish to exclude certain groups of customers that may also be a part of the Included Group, you can do that by selecting the **Exclude Audience Groups** link, which opens a new section in the Audience Definition window

- Select the **Exclude Audience Groups** link.
- Click **+ Add Audience Group**.
- Select an Available List type.

- - **All** – Default group listing.
  - **Stratified** – The Customers within a Stratified list are divided into levels.
  - **Unstratified** – The Customers within an Unstratified list are not differentiated into separate groups.
  - **Personal** – User created groups.
- In the Search field, enter some or all of the **List Name**, **ID**, or **Strata Name**.
- Click **Search**.
- The results can be sorted by using the **Sort by list** menu with the following options:
  - Last Updated
  - Name
  - Customer Count
- Enter a **Group Name**.
- Click **Add** to add the selection Assigned Audience Lists.
- Click **Add** for another list means you are using the condition **AND**. Both conditions must be met.
- Click **OK and Add Another** to keep you in the same window and use the condition **OR**. One or more of the conditions must be met when you click **Add** for another Audience Group.

15. When finished entering all Audience Groups for the Promotion, click **Next.**
    - If the Selection Method selected in **Step 14**, is Static, continue to the next tab, the **Filtering Audience** tab.
    - If the Selection Method selected in **Step 14** is Dynamic, continue to **Step 20**, the **Control Groups** tab.
16. Enter the following for the **Filtering Audience** tab.

Figure 6-131 Filtering Audience Tab

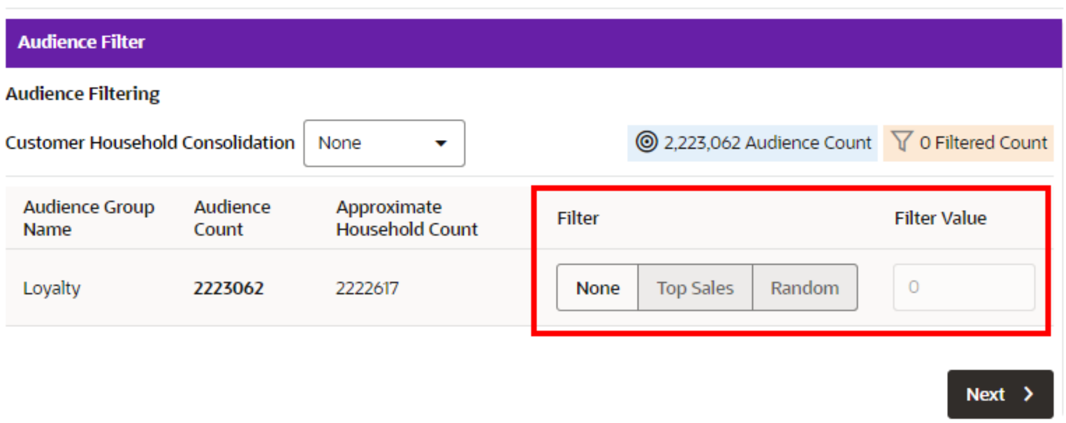


Use the **Customer Household Consolidation Selection Menu** to indicate whether the Promotion will use household consolidation, and the rule for determining the Customer who is the head of household.

- **None** – Do not perform household filtering.
- **LT Sales** – Select head of household based on amount purchased over the lifetime of their account.
- **LT Transaction Count** – Select head of household based on lifetime number of transactions.
- **Last Transaction Date** – Select head of household based on the Customer who performed the most recent transaction.
- **Customer Attributes** – Select head of household based on the Customer's numeric attributes.

Select the **Filter Type** for each Audience:

Figure 6-132 Select Desired Filtering

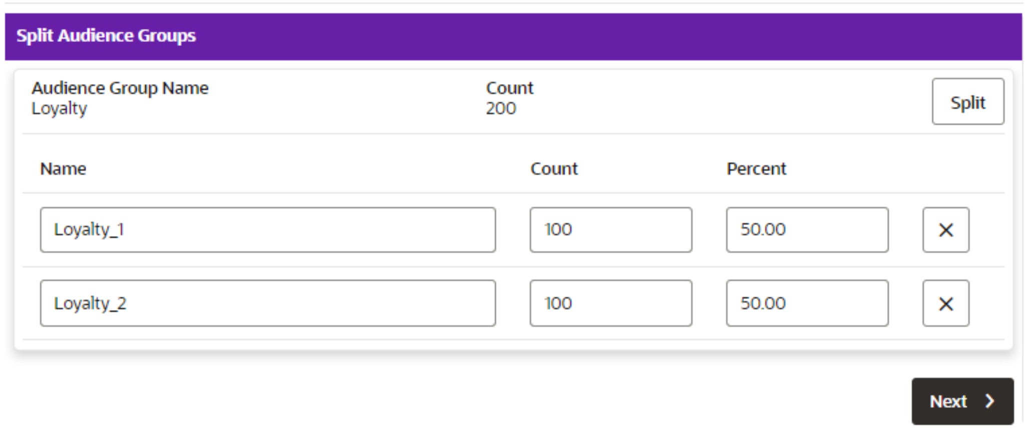


- **None** - [DEFAULT] All Customers in the Audience Group are eligible.
- **Top Sales** - Customers from the Audience Group will be chosen for eligibility by the greatest total amount of purchases.
- **Random** - Customers from the Audience Group will be chosen randomly for eligibility.

Enter a **filter value** to indicate the number of customers eligible for the promotion.

17. When finished entering any household filtering for the Audience Groups for the Promotion, click **Next** to continue to the **Split Audience** tab.
18. In the Split Audience tab, filtered audiences can, optionally, be split into smaller, separate audiences. If desired, create splits for the filtered audiences on the promotion.
    - Click **Split**.

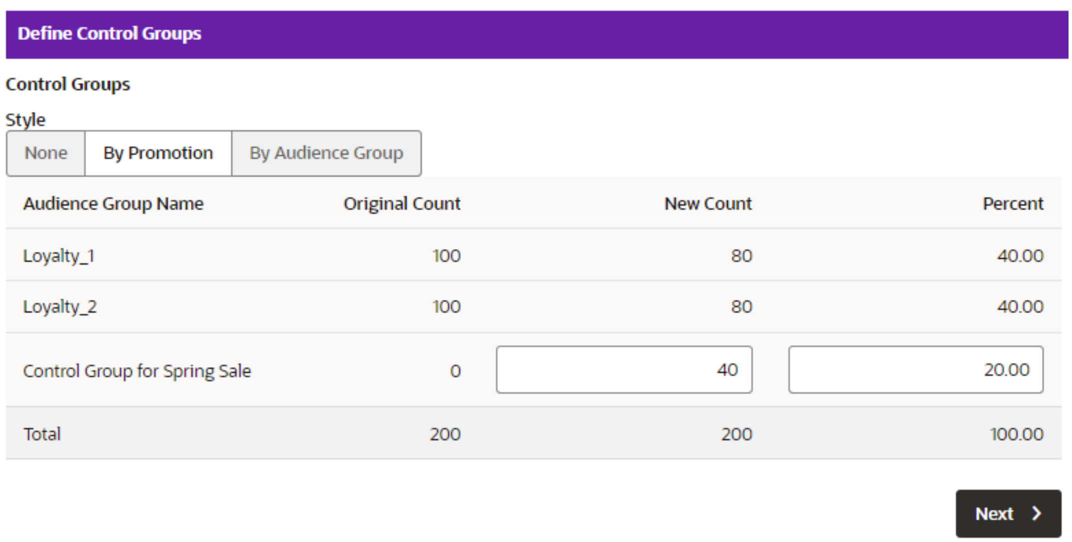
Figure 6-133 Split Audience Groups



- The Split Name field is automatically populated from the name of the Audience Group Name. If desired, you can change the name of the splits in this step.
- Select **Split** to automatically divide the Audience Group into equal portions and percentages. If you desire different portions or percentages for the splits, enter either a count or a percentage, and the corresponding field will update.

19. When finished entering any Audience Group splits for the Promotion, click **Next** to continue to the **Control Groups** tab.
20. Enter the following information for the **Control Groups** tab.

Figure 6-134 Define Control Groups



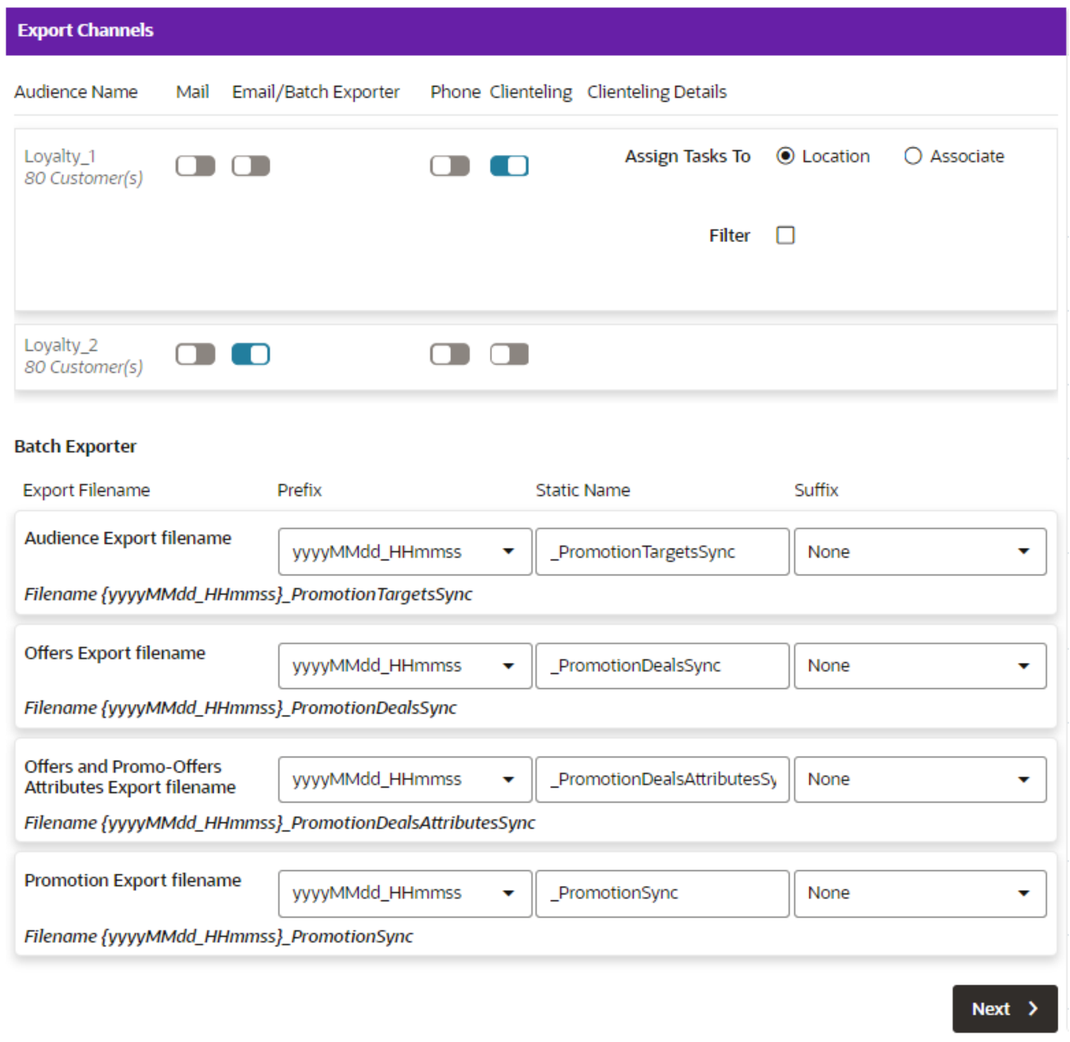
The control group is a statistically identical group that doesn't receive the offer. Following the promotional period, the results of the two groups are compared and you can determine if the offer generated incremental revenue. Options include:

- **None** – No Control Group
- **By Promotion** – Enter either a New Count or Percent. The corresponding field will update automatically to determine the size of the control group.

- **By Audience Group** – Enter either a Control Group count or percentage for each split created earlier. The corresponding field will update automatically.

21. When finished entering any Control Groups for the Promotion, click **Next** to continue to the **Export Channels** tab.
22. Enter the following information for the **Export Channels** tab. The options include:

Figure 6-135 Export Channels Tab



Mail - Determines whether the Customers in the Split/Control Group will be contacted by Mail.

EMail / Batch Exporter - Determines whether the Customers in the Split/Control Group will be contacted by Email.

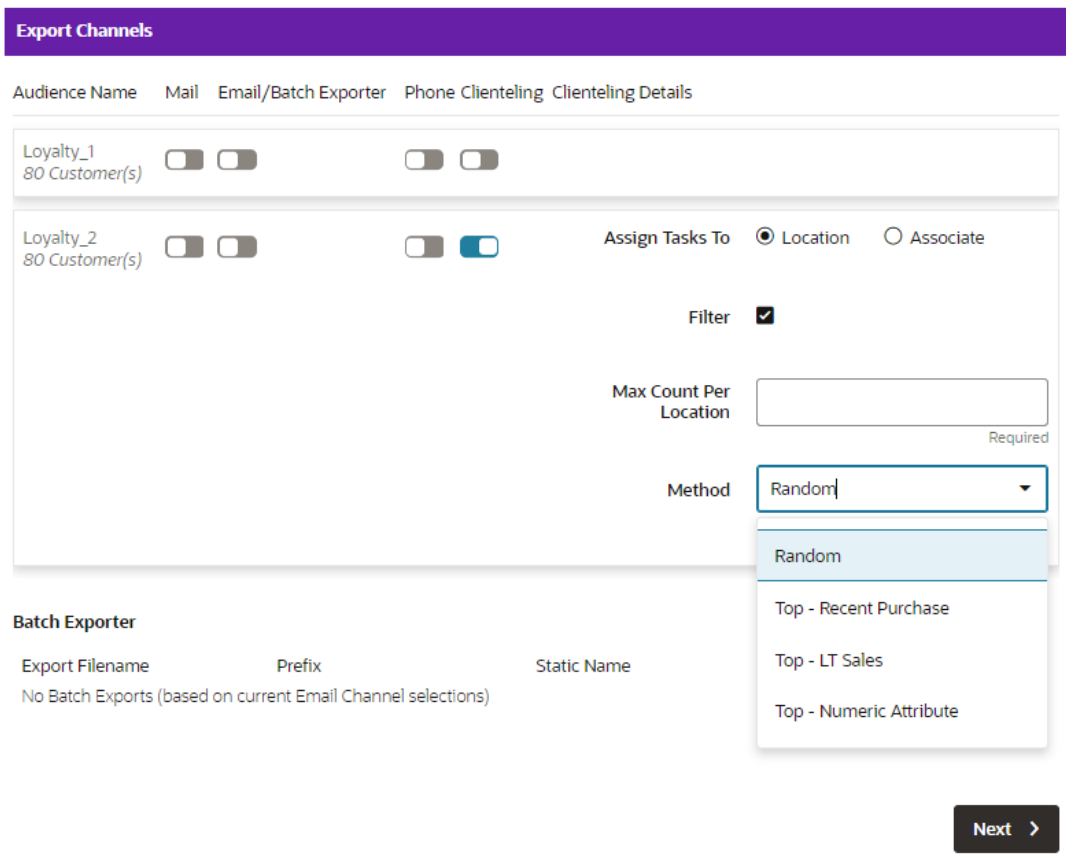
> **Note:**
>
> The system configuration setting *SupportedBatchExporters* determines if the Batch Exporter section is displayed.

- Export Filename – Name of the file.
- Prefix – Indicates the format of the datetime stamp used as a prefix the filename. Optional. Possible settings are yyyyMMdd_HHmmss, yyyy-MMdd_HHmmss, or none.
- Static Name – The identifying filename.
- Suffix – Indicates the format of the datetime stamp used as a suffix the filename. Optional. Possible settings are yyyyMMdd_HHmmss, yyyy-MMdd_HHmmss, or none.
- Filename – Displays an example of the export file name with the prefix and suffix format, if any.

Phone - Determines whether the Customers are contacted by phone.

Clienteling – When the Clienteling switch is turned on, tasks will be created based on the assigned associates or locations for the defined target audience when the promotion is generated.

Figure 6-136 Clienteling Details



Assign Tasks to:

- **Location Channel** – Tasks are assigned to a Location.
- **Associate Channel** – Tasks are assigned to an associate in a location.

The following fields are enabled if the Filter option is selected:

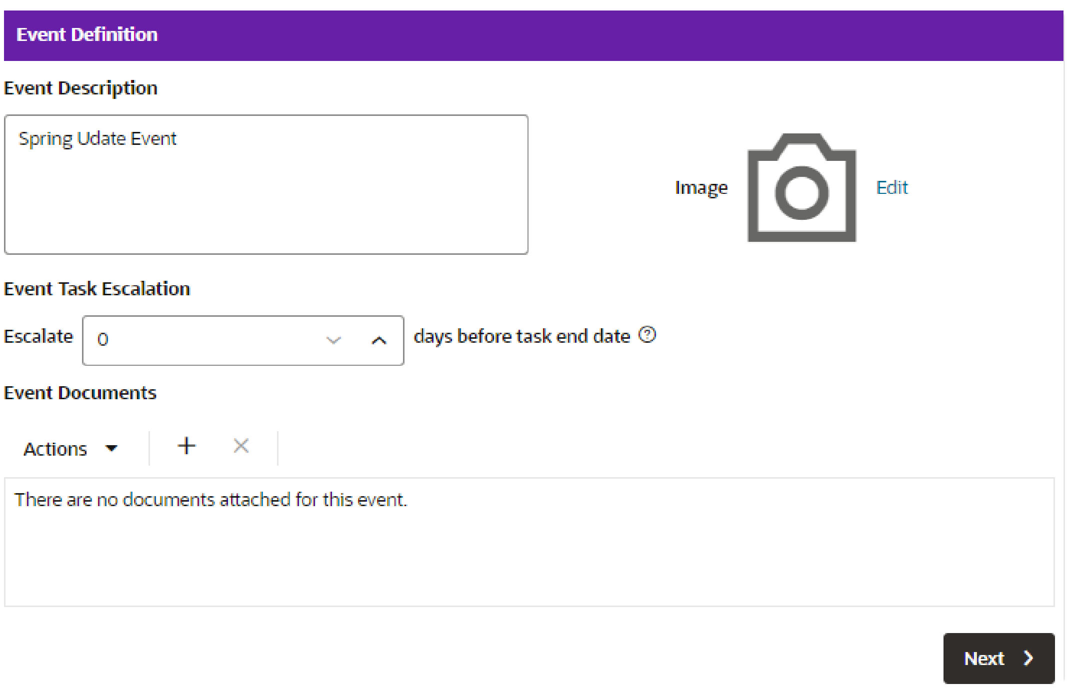
- **Max Count Per <type> -** Determines the maximum number of target Customers that will be contacted through the channel.

- **Method** - Method used to select the Customers contacted. Options include:
  - **Random** - Select Customers Randomly (Default).
  - **Top - Recent Purchase** - Filter the Customers based on the most recent purchases.
  - **Top - LT Sales** - Filter the Customers based on the largest amount purchased over the lifetime of their account.
  - **Top - Numeric Attribute** - Filter the Customers based on the highest attribute value for a selected numeric attribute. If this option is selected, an additional Channel Filter option, Attribute, displays. Attribute is the numeric attribute used to determine the customers contacted

23. When finished entering any Export Channels for the Promotion, click **Next** to continue to the **Event Definition** tab.
    - If Clienteling is not enabled, proceed to **Step 26**, the Budget Tab.
    - If Clienteling is enabled, proceed to **Step 24**, the Event Definition tab.
24. Enter the following information on the Event Definition tab.

> **Note:**
>
> The Event Definition Tab displays only when the Promotion uses the Clienteling Channel.

Figure 6-137 Event Definitions Tab



Enter a **description** of the Event in the Event Description field (required).

Select the **Edit** option to add an image to the Event.

a. Perform one of the following actions:

   Click **Drop a new image here or click to upload** to add the image and continue to Step 31.b.

   Enter a **URL** in **Or Via URL** and click **Upload** and continue to Step 31.b.

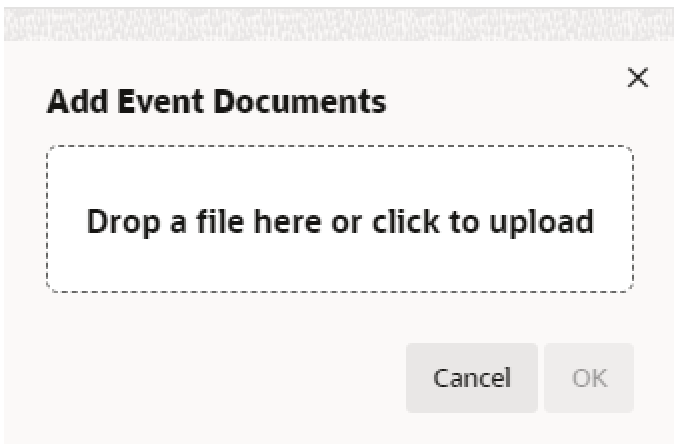
   Click **Remove Image** to remove the image and continue to Step 31.b.

b. Click **Done** to save the changes and close the window, or click **Cancel** to close the window without saving any changes.

Event Task Escalation – This option will flag an Event Task for the promotion as high priority on the Day Planner Task panel based on the number days before the end date of the promotion event task.

Event Documents – Click the Action Menu, and click Add, or click the Add icon (+) to open the Add Event Documents window.

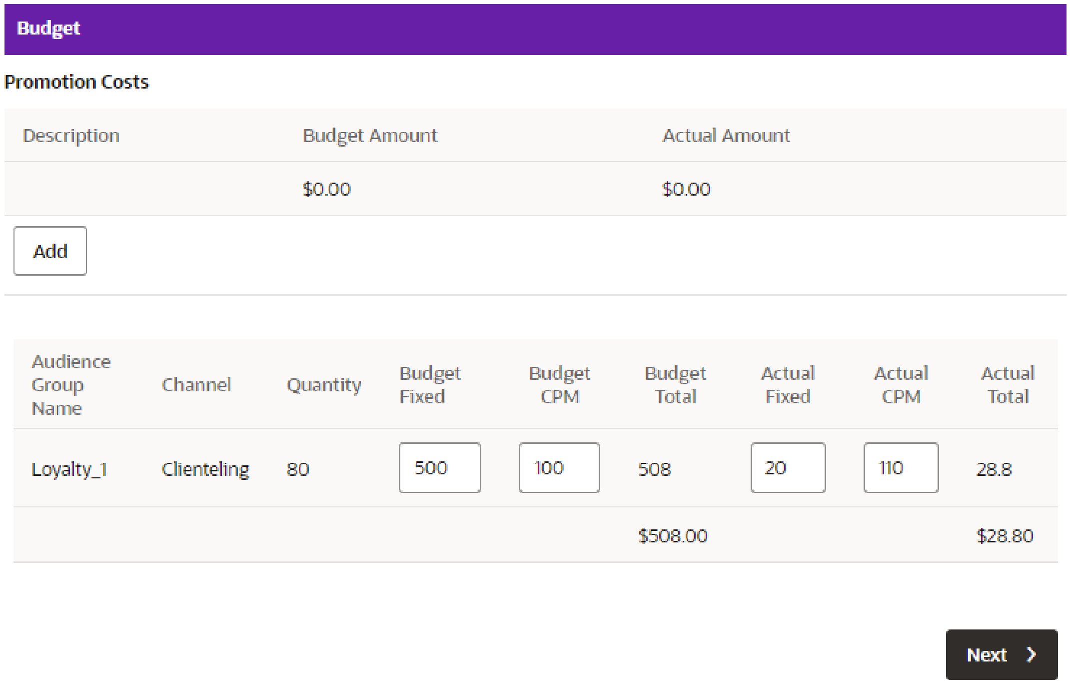
Figure 6-138 Add Event Documents



- Use the **Drop a file here or click to upload area** to add an event document.
- Click **OK** to save the changes and close the window, or click **Cancel** to close the window without saving any changes.

25. When finished entering any Event Definitions for the Promotion, click **Next** to continue to the **Budget** tab.
26. Enter the following information on the **Budget** tab.

Figure 6-139 Budget Tab



a. Click **Add** to enter the Promotion Costs. Enter values in any field is optional.

b. Enter a **Description** of the cost item.

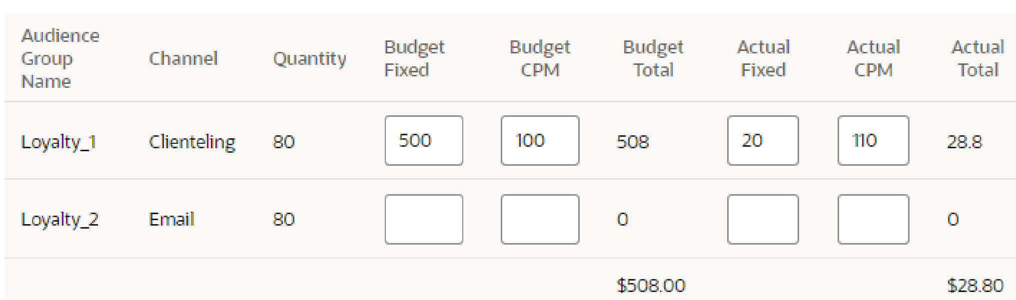
c. Enter the **budgeted amount** for the Promotion in the Budget Amount field.

d. Enter the **actual amount** for the Promotion in the Actual Amount field.

e. Click **Add** if you wish to enter another budget line for the promotion, then follow Steps **a-d** to complete the fields.

   If Export Channels were selected for the audience group, the Audience Groups Costs section appears. Entering values in any field is optional.

Figure 6-140 Audience Group Costs



f. In the Budget-Fixed field, enter the **fixed cost budgeted** for the audience.

g. In the Budget-CPM field, enter the **cost budgeted** for the Channel for each 1,000 Customers.

h. In the Actual-Fixed field, enter the **actual fixed cost** of the Channel.

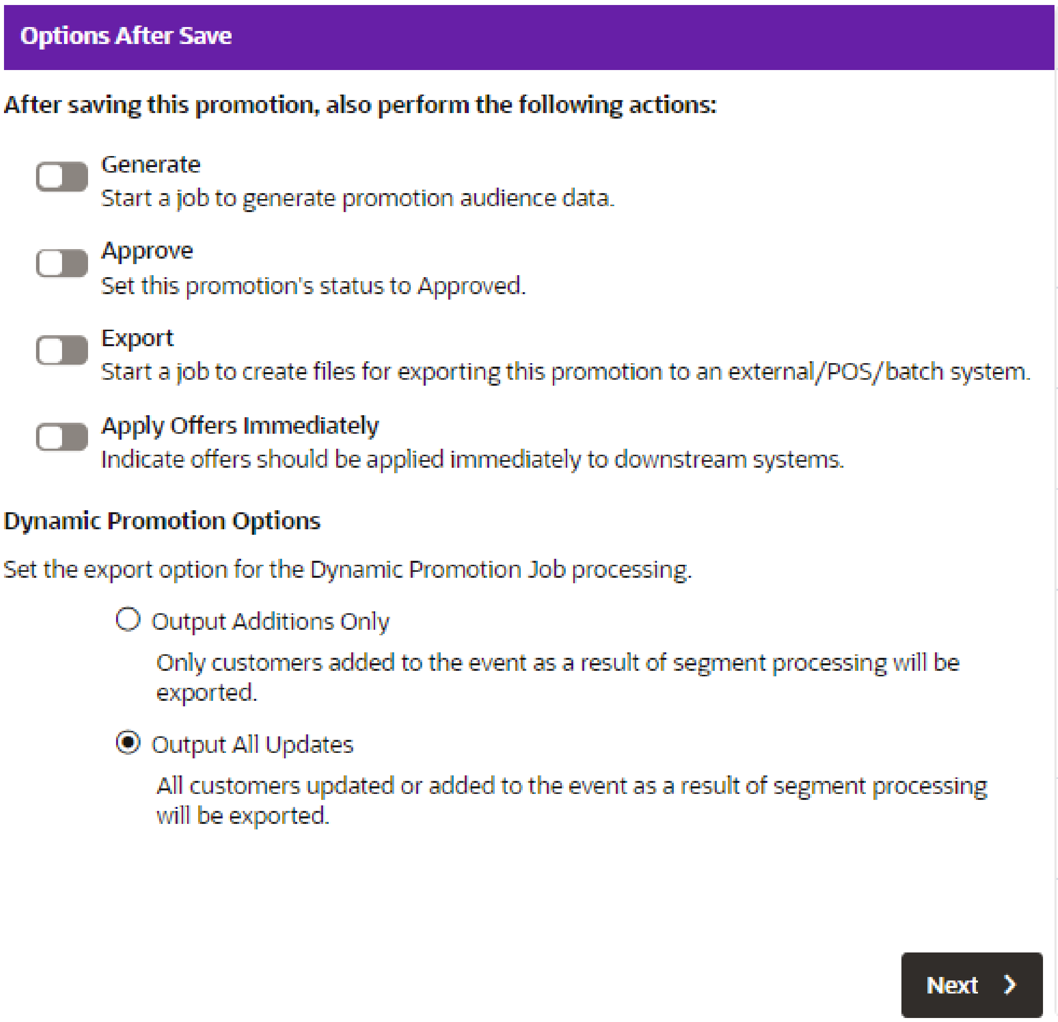
i. In the Actual-CPM field, enter the **actual cost** of the Channel for each 1,000 Customers.

j. Repeat **steps f-i** for each Target Channel in the Promotion.

27. When finished entering any Budget Costs for the Promotion, click **Next** to continue to the **Save Options** tab.

28. Enter the following information in the **Save Options** tab. You can enter more than one choice.

Figure 6-141 Options After Save Tab

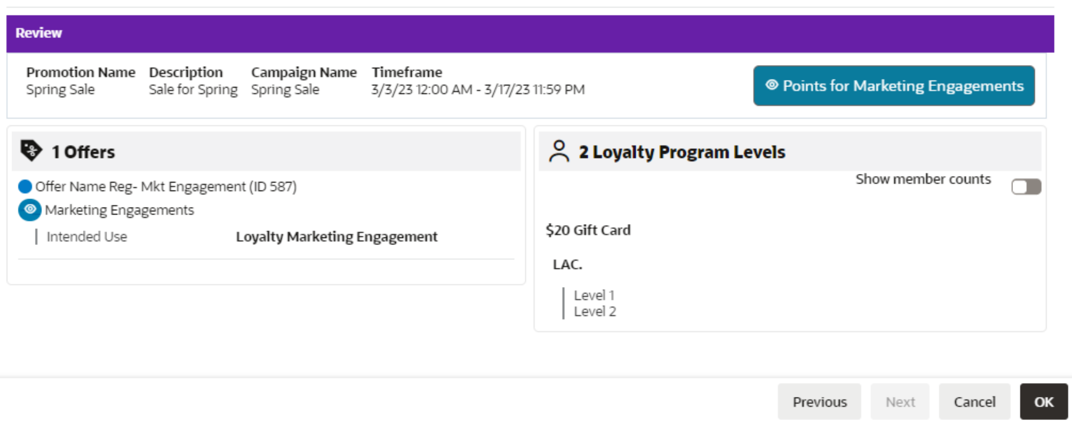


- Generate – Start a job to generate promotion audience data.
- Approve – Set this promotion's status to Approved.
- Dynamic Promotion Options – Select one of the two export options for processing when using the Dynamic selection method on the Audience tab.

> **Note:**
>
> Depending on the type of promotion that you created, different Options After Save are available.

29. When finished entering any Save Options for the Promotion, click **Next**.
30. The **Review** tab displays the key elements in the Promotion Setup.

Figure 6-142 Review Tab



31. Click **OK** to save the Promotion, or click **Cancel** to close the promotion without saving. Click **Previous** or any **Tab** to return to any point of the Create Promotion process.

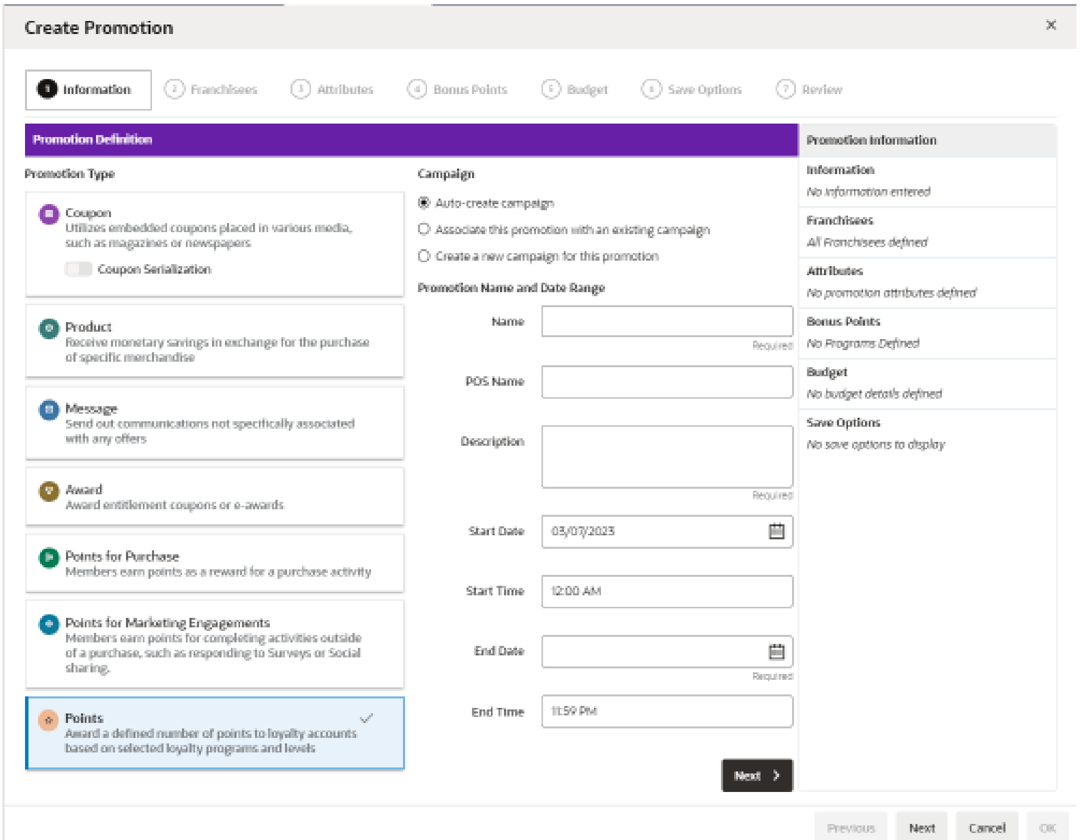
Creating a Points Promotion

There are a few choices available to start the process of creating a promotion. The **Create Promotion** button is available in both the Promotion Home window as well as the Promotion Search window.

> **Note:**
>
> You will need the Promotion Home role to access the Promotion Home window.

1. Click **Create Promotion**, which opens up the Promotion wizard to the Information tab.

Figure 6-143 Information Tab - Points



2. Select the Promotion Type: **Points**

> **Note:**
>
> Contact your administrator if you do not see the Promotion Types needed for your promotion

3. Select one of the choices for the Campaign.
   - **Auto-create Campaign** – The campaign is automatically created and will use the same name and description from the promotion name and description.
   - **Associate this promotion with an existing campaign** – Uses existing campaigns in the system.
     – Click the list arrow and select an **existing campaign**.

     > **Note:**
     >
     > The Start Date and End Date display underneath the Existing Campaign list.

   - **Create a new campaign for this promotion** – A new campaign is created with this promotion being the first added.
4. Enter the following information:

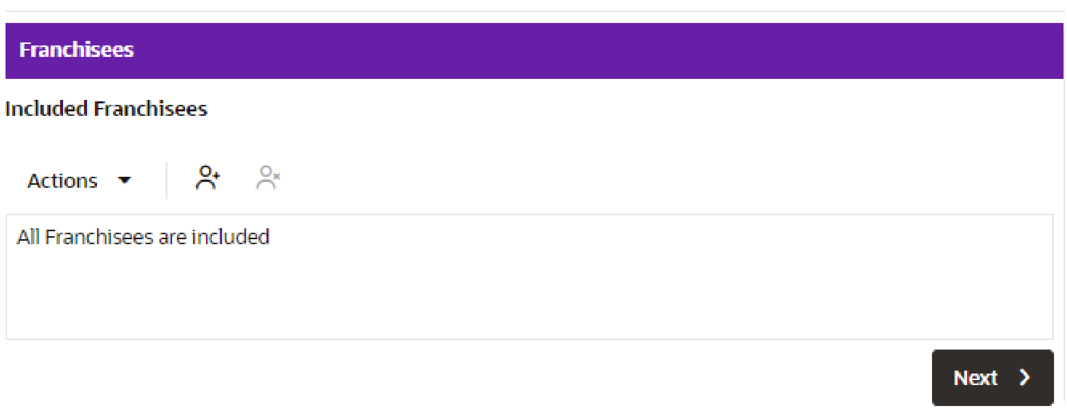
- Enter a **Campaign Name** (for new Campaigns only).
- Enter a **Description** (for new Campaigns only).
- Enter a **Name**.
- Enter a **POS Name**.
- Enter a **Description**.
- Select a **Start Date**.
- Select a **Start Time**.
- Select an **End Date**.
- Select an **End Time**.

5. When finished entering the Campaign and Promotion information, click **Next** to continue to the **Franchisees** tab.

> **Note:**
>
> This tab will only display if the `EnableFranchiseSupport` configuration is enabled, and Franchisees have been created.

6. By default, all franchisees are assigned to the promotion. To make changes to those assignments, do the following:

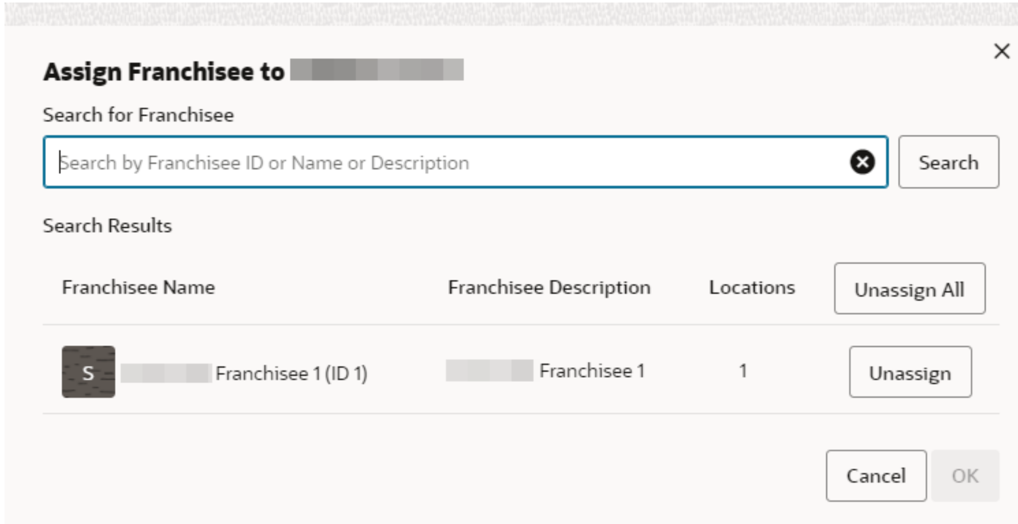
Figure 6-144 Franchisees Tab



Assigning a Franchisee

a. Click the **Actions Menu**, then, click **Assign**, or click the **Add (+)** icon. This opens the Add Franchisee window.

Figure 6-145 Assign Franchisee



b. In the Search for franchisee search box, enter part or all of the **Name**, **ID**, or **Description**, then click **Search**.

> **Note:**
>
> You can also leave blank and click Search to return all Franchisees.

c. To change the assignment from ALL (which is defaulted) click **Assign** on just the specific franchisees you wish to assign for this promotion. Only Franchisees associated with the user are displayed in the list.

d. Click **OK** to accept the changes or **Cancel** to close the window without saving.

Figure 6-146 Confirmation Notification

> **Note:**
>
> A confirmation notification appears to confirm the franchisee has been assigned.

Deleting a Franchisee

a. In the included Franchisees window, highlight the desired **row**.

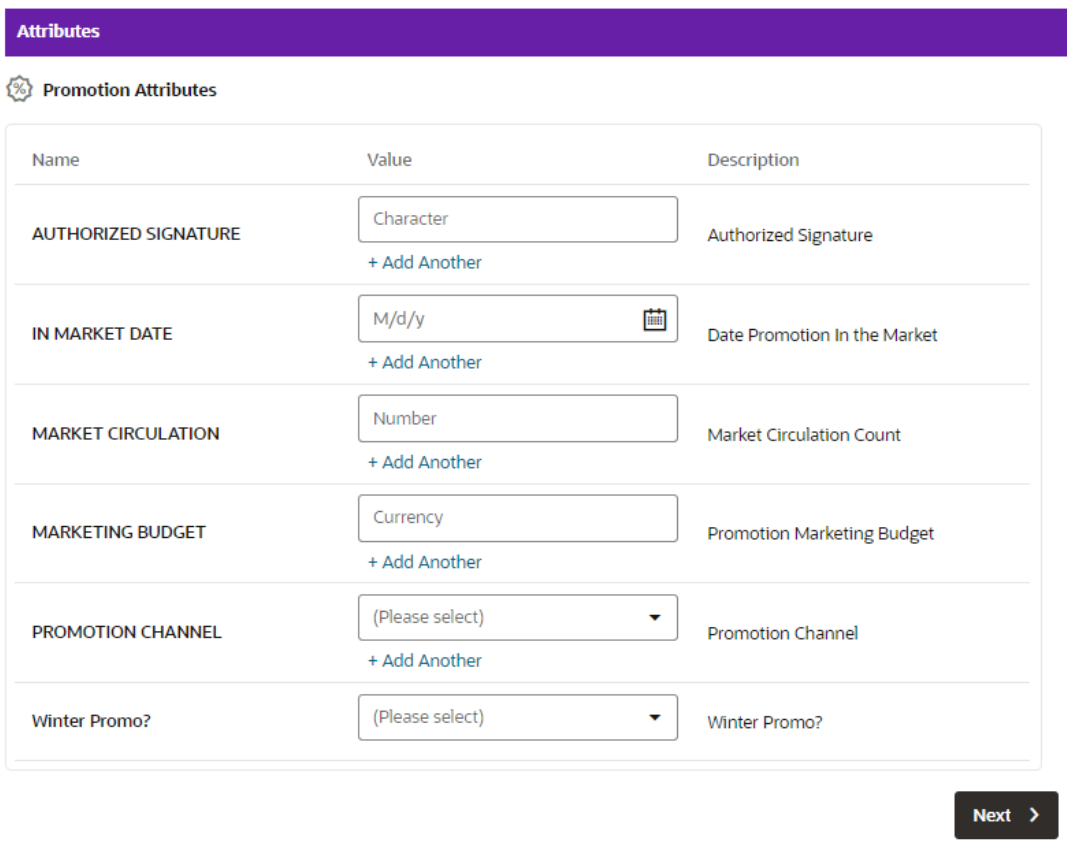
b. Click the **Action Menu**, and click **Delete**, or click the **X** icon.

Note:

A confirmation notification appears to confirm the franchisee has been deleted.

7. When finished entering the Franchisees information, click **Next** to continue to the **Attributes** tab.
8. Enter the following for the **Attributes** tab.

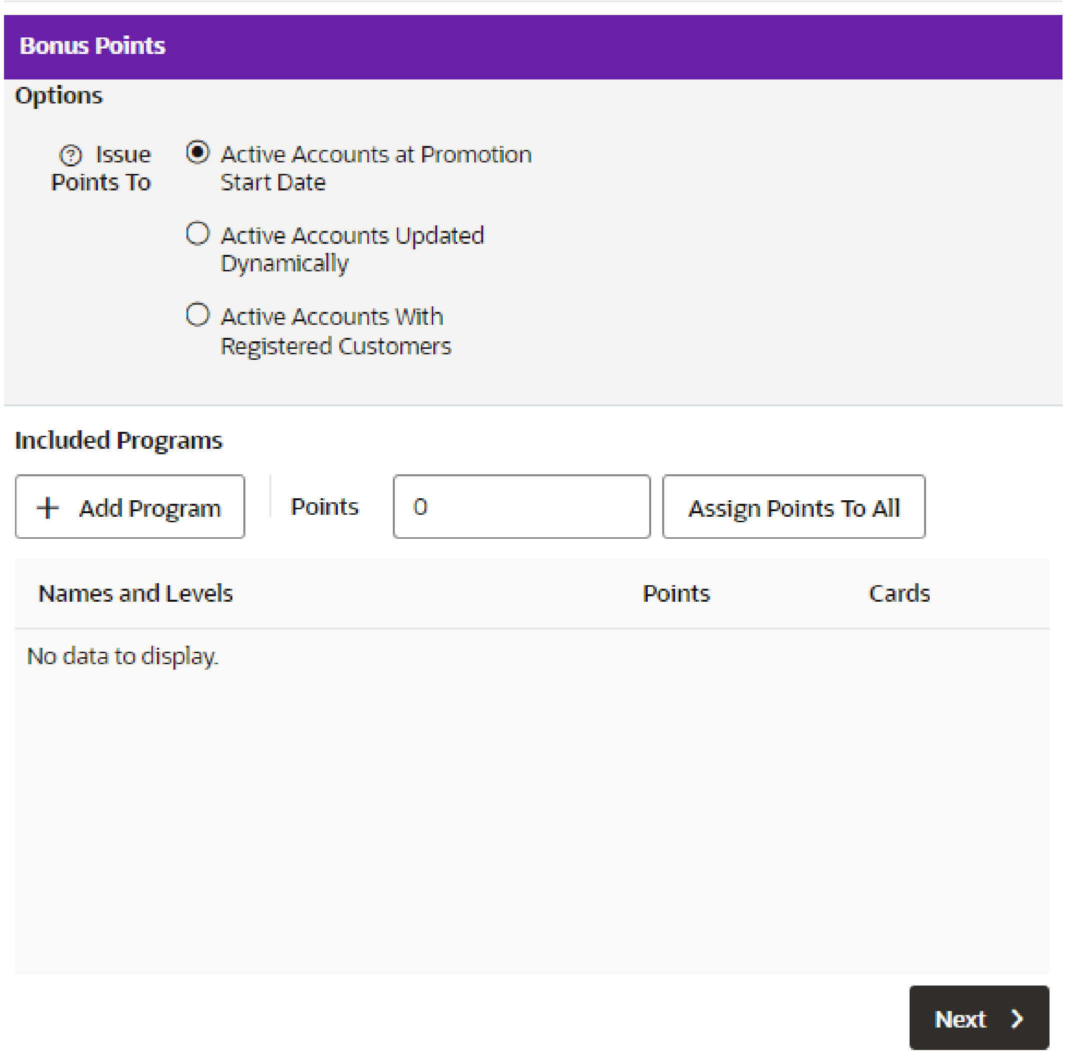
Figure 6-147 Select Attributes



Complete values for any Promotion Attributes you want added to the promotion. Fields marked with an asterisk are required.

9. When finished adding Attributes for the Promotion, click **Next** to continue to the **Bonus Points** tab.
10. Take the following actions for the Bonus Points tab.

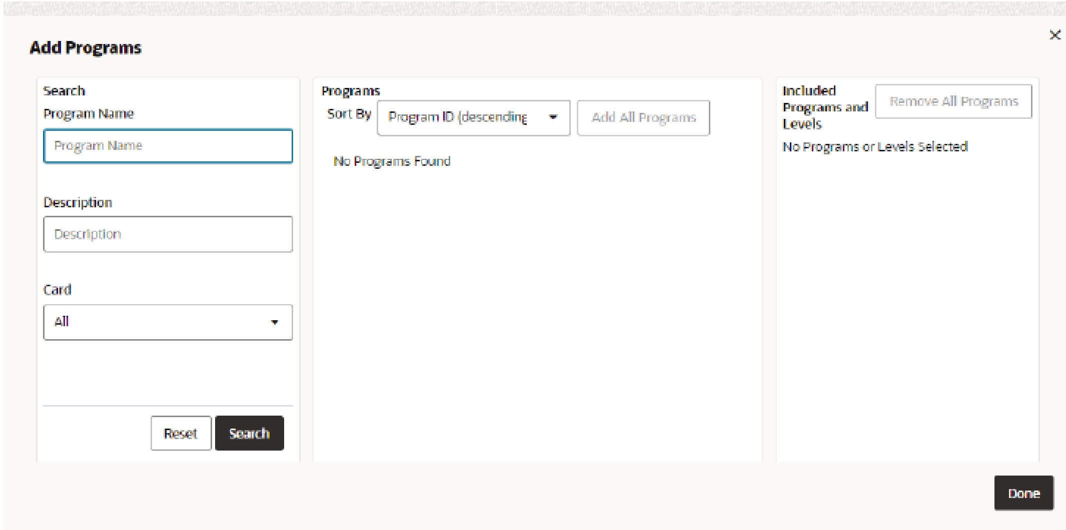
Figure 6-148 Bonus Points Tab



11. Select one of the following options:
    - **Active Accounts at Promo Start Date** -The bonus points will be applied to all active accounts for the selected Loyalty Programs and Levels. This will apply to all accounts regardless if there is a customer registered to the account.
    - **Active Accounts Updated Dynamically** - The bonus points will be applied to all active accounts for the selected Loyalty Programs and Levels. Additionally, any accounts added during the promotion period will also receive the bonus points. This will apply to all accounts regardless if there is a customer registered to the account.
    - **Active Accounts With Registered Customers** - The bonus points will be applied to all active accounts for the selected Loyalty Programs and Levels. This will apply to only accounts that have a customer registered to the account. Additionally, this will enable the Audience tab to display and provide the ability to further define the loyalty members that receive the promotion by selecting appropriate segments.
12. Click **+ Add Programs**.

    Result: The Add Programs window appears.

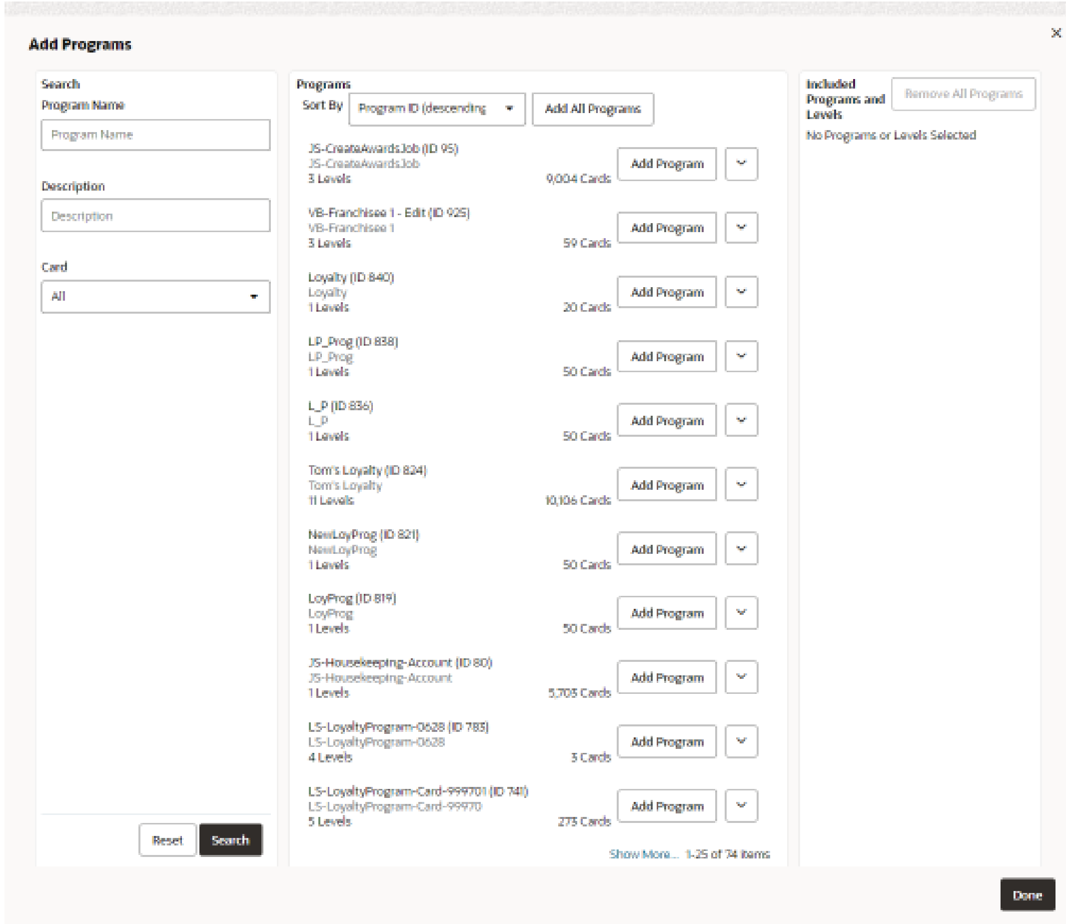
Figure 6-149 Add Programs



13. In the Search for programs search box, enter part or all of the **Program Name**, or **Description**.
14. Click the **Card** options list
    - Select a **Card**.

      A list of cards display all active cards for the user to select from. If there is only one card to select from, the card appears by default and the list arrow is unavailable for selection. The default card selection is **All**.
15. Click **Search** to view the results, or click **Reset** to clear the selections. All programs appear if no criteria is entered.

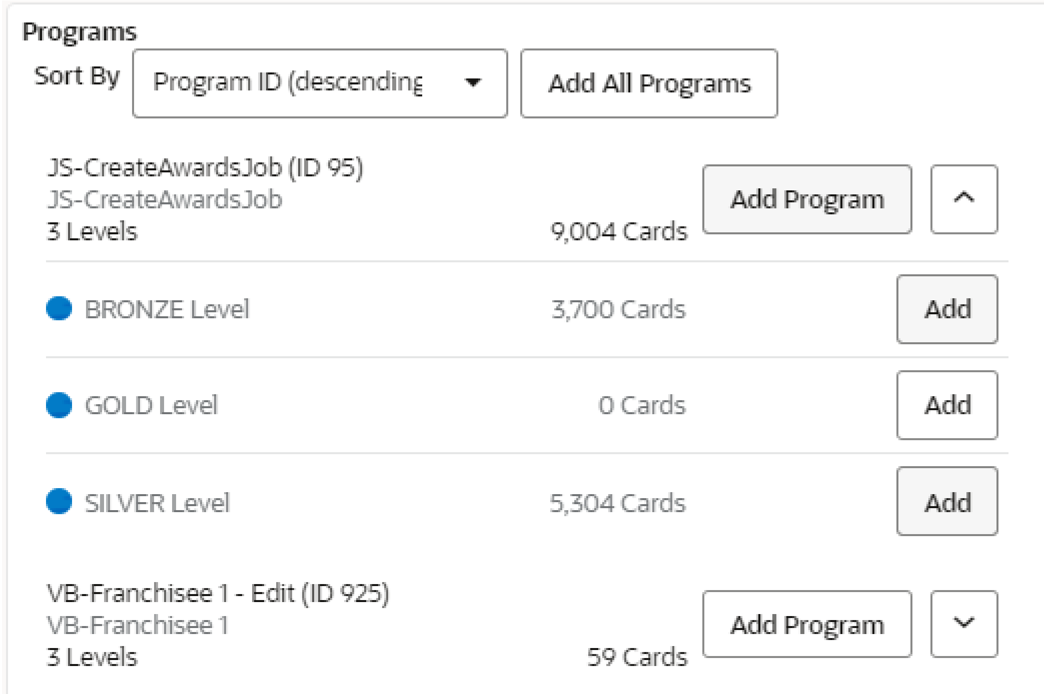
Figure 6-150 Add Programs Search Results



- Sorting options include:
  - Program ID (ascending)
  - Program ID (descending) - Default
  - Program Name (ascending)
  - Program Name (descending)

16. To add a program perform one of the following options:

Figure 6-151 Programs Search Results Add Options

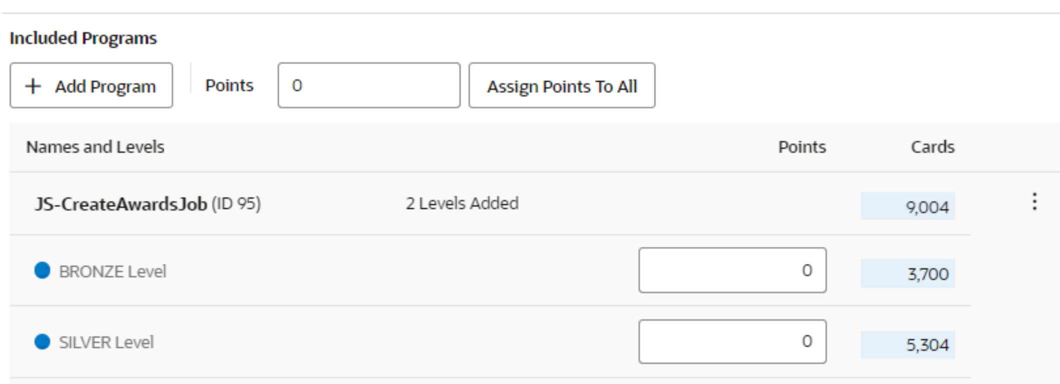


- Click **Add All Programs** to include all programs listed in the search results.
- Click **Add Program** to include the program and all levels in that program.
- Click either the up or down arrows located next to **Add Program** to hide/display the available levels for each program. Click **Add** to only add a specific loyalty level for each program.

17. To remove included programs and levels click the **X** icon for each entry. You can also click **Remove All Programs**.
18. Click **Done**.

    Result: The included programs appear and are ready for points value assignments.

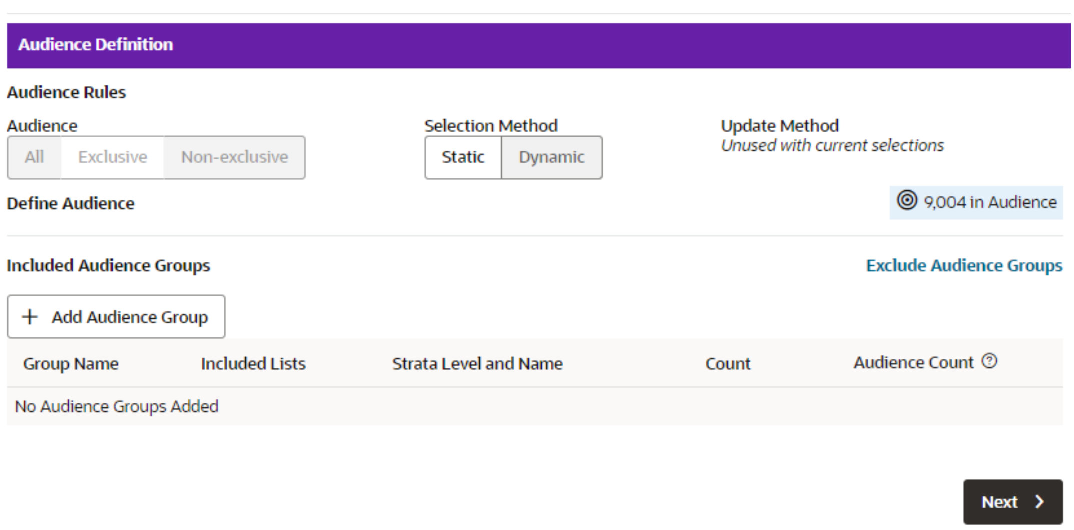
Figure 6-152 Included Programs - Assign Points



> **Note:**
>
> The last column header for the Included Programs are based on which Issue Points To option is selected. Active Accounts with Registered Customers are Members. All other options are Cards.

19. There are two options for adding points to the Included Programs:
    - To increase or decrease the number of points for all programs, either:
      - Enter the **number of points** in the Points field located next to the + Add Program button.
      - Use the up or down arrows to reach the desired number.
    - To increase or decrease the number of points for individual programs, either:
      - Enter the **number of points** in the Points field located in the table for each entry.
      - Use the up or down arrows to reach the desired number.
20. When finished configuring the Bonus Points for the Promotion, click **Next**.
    - If the Bonus Points issues points to Active Accounts at Promo Start Date, go to Step 31 to continue to the Budget tab.
    - If the Bonus Points issues points to Active Accounts Updated Dynamically, go to Step 31 to continue to the Budget tab.
    - If the Bonus Points issues points to Active Accounts with Registered Customers, continue to the next step, the Audience tab.
21. Take the following actions for the Audience tab.

Figure 6-153 Audience Tab



Audience Rules – Exclusive is the only option available for the Points Promotion to define the audience.

Exclusive Targeting - If you create an exclusive targeted promotion, this means that only the customers you've identified in your target group are eligible to receive the promotion at the point of sale.

- The Selection methods include:
  - **Static** – Only customers defined at this time are considered eligible for the promotion.
  - **Dynamic** – Dynamic can not only add customers but also remove customers that no longer apply. When Dynamic is selected, Update Method is available.

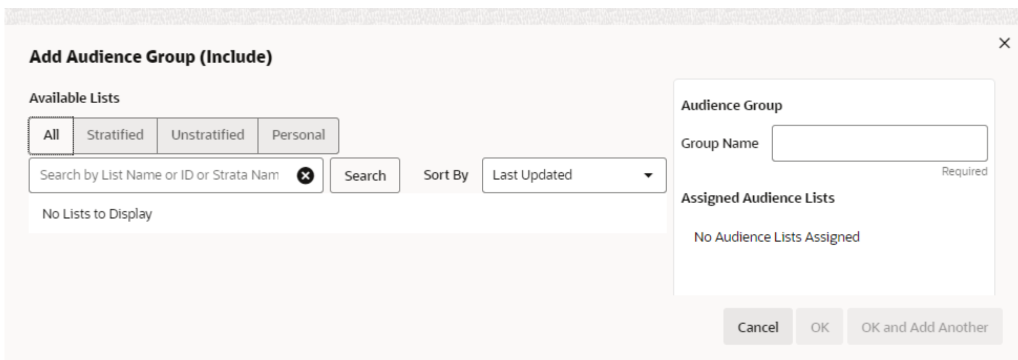
  New audience members will be added – When the Dynamic and Recurring Promotions job runs, any new customers found that meet the criteria, are added to the audience. All customers currently in the audience will remain in the audience.

  Audience members can be added and removed – When the Dynamic and Recurring Promotions job runs, any new customers found that meet the criteria, are added to the audience. Additionally, only the customers that meet the criteria will be included in the audience. If the customer is in the audience before the job runs, but no longer meets the criteria, the customer will be removed from the audience.

Define Audience - Included Audience Groups

a. Click + **Add Audience Group**.

Figure 6-154 Add Audience Group (Include)



b. Select an **Available List** type

   All - Default

   Stratified - The Customers within a Stratified list are divided into levels.

   Unstratified - Customers maintained by the user.

   Personal - Customers maintained by the user.

c. In the Search field, enter some or all of the **List Name**, **ID**, or **Strata Name**.

d. Click **Search**. The results can be sorted by using the Sort by list menu with the following options:

   Last Updated

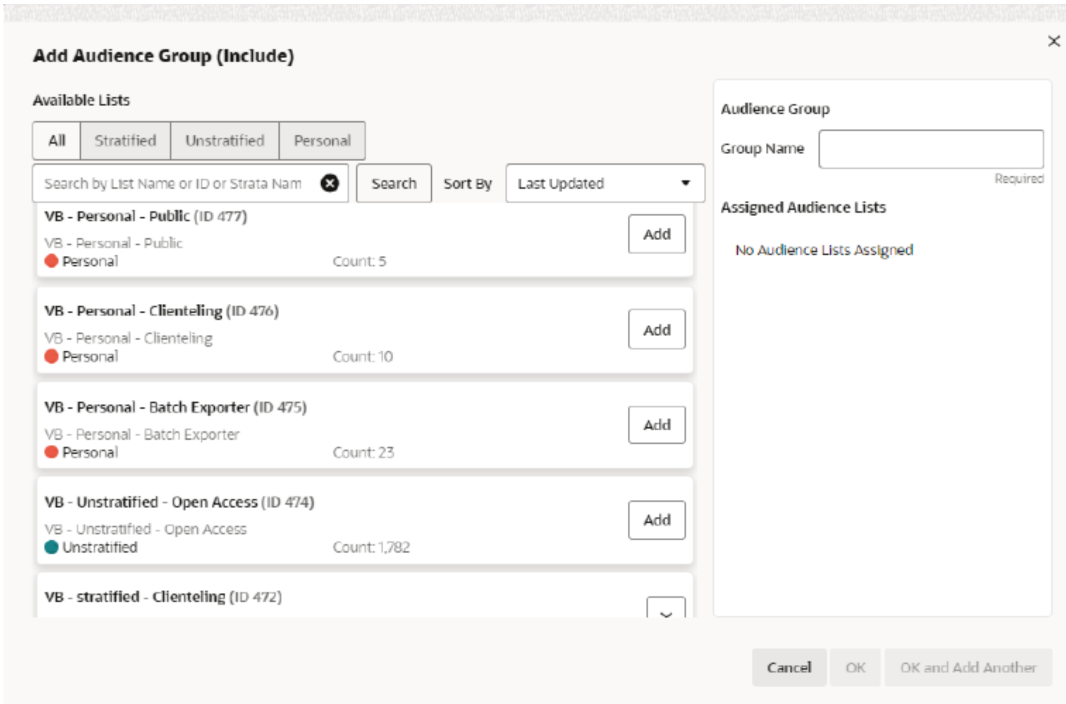
   Name

   Customer Count

e. Enter a **Group Name**.

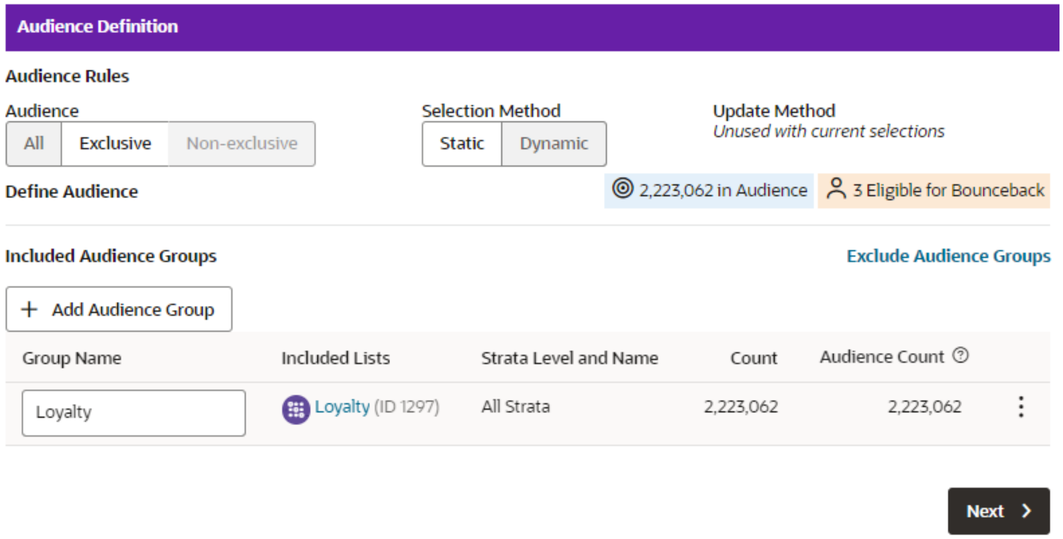
When lists are added from the Available Lists area, they appear in the Audience Groups section of the window. The Audience Group section Group Name automatically defaults to the name of the first list added. You can change the Group Name to something more meaningful to describe the group of customers, if desired.

Figure 6-155 Add Audience Group (Include)



a. Click **Add** to add the selection Assigned Audience Lists.
b. Click **Add** for another list means you are using the condition AND. Both conditions must be met.
c. Click **OK and Add Another** to keep you in the same window and use the condition OR. One or more of the conditions must be met when you click Add for another Audience Group.

Figure 6-156 Audience Definition



As shown in Figure 6-156 the Count is shown for each audience group. In the Audience Rules section the Audience Count is provided on the right hand side.

Columns include the following details:

- Group Name
- Included Lists
- Strata Name and Level (if applicable)
- Count
- Audience Count

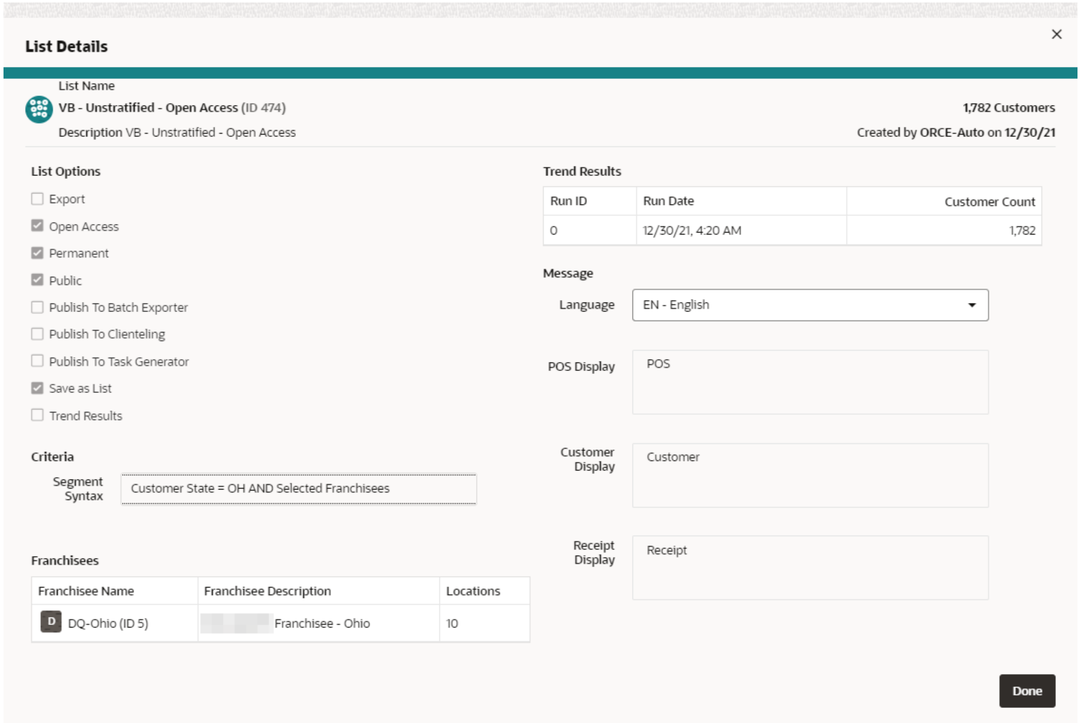
Each Group Name has an Overflow Menu Icon where you can Edit or Remove the Audience Group from the list.

The Included Lists column displays a link on that list (also known as a segment) and that link will open to the Audience List Details window.

In this window, the following sections may display, depending on the type of list and which of the options were selected when the list was created:

- List Options section
- Criteria section
- Trend Results section
- Strata Levels section
- Attributes section
- Franchisees section
- Message section
- Scheduled Jobs section

Figure 6-157 List Details



The checked List Options vary by the selections made when the list was created, and may include the following fields:

- **Export** – Indicates whether the Segment list is automatically exported after the Segment Query is run.
- **Open Access** – Indicates whether the Segment has Open Access.
- **Permanent** – Indicates whether the Segment is kept in the system, even if it meets the criteria for deletion by the housekeeping job.
- **Public** – Indicates whether the Segment is Public.
- **Publish to Batch Exporter** – Indicates whether the Segment has been made available for export to a Marketing system.
- **Publish to Clienteling** – Indicates whether the Segment has been made available to the Clienteling module.
- **Publish to Task Generator** – Indicates whether the Segment has been made available to the Task Generator Job.
- **Save as List** – Indicates whether a list of matching Customer IDs is created when the Segment is created.
- **Trend Results** – Indicates whether the results of the Segment run are kept to provide trend information about the Segment.

Figure 6-158 displays the Trend Results in a chart. A user can scroll down to see a table as shown in Figure 6-159, which for this segment shows the Strata Levels Against Customer Age and displays the strata that are shown in the graph.

Figure 6-158 List Details Trend Results - Chart

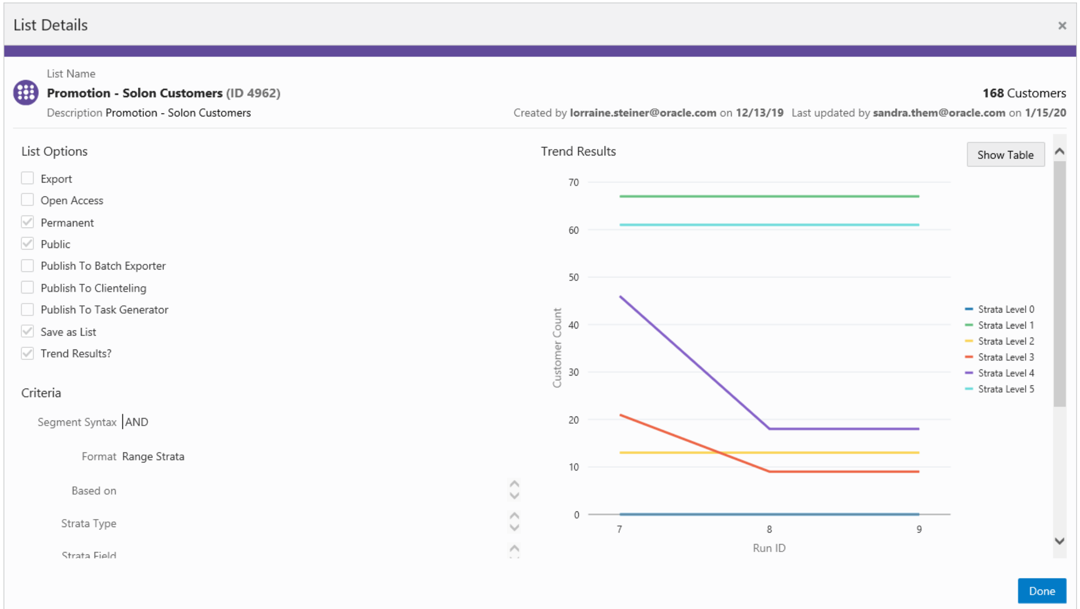


Figure 6-159 Trend Results Graph - Table

Strata Levels Against Annual Income

Strata Name	From (>=)	To (<)	Customer Count
Strata 1	0	50	2,216,204
Strata 3	51	>	6,858

Figure 6-160   List Details Trend Results - Table

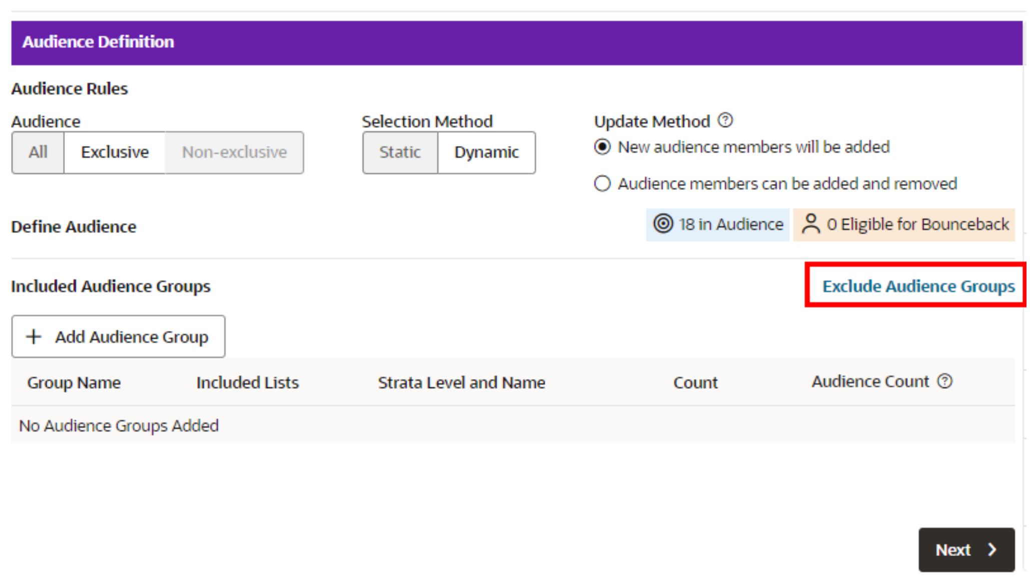
Trend Results

Show Chart

Run ID	Run Date	Strata Level	Customer Count	Minimum Value	Maximum Value	Average Value
95	1/29/21, 1:00 AM	1	99	0	0	0
95	1/29/21, 1:00 AM	2	92	0	0	0
95	1/29/21, 1:00 AM	3	93	0	0	0
94	1/27/21, 4:36 AM	1	99	0	0	0
94	1/27/21, 4:36 AM	2	92	0	0	0
94	1/27/21, 4:36 AM	3	93	0	0	0

- Click **Done** to close the Audience List Details window.

Figure 6-161   Audience Definition - Exclude Audience Groups



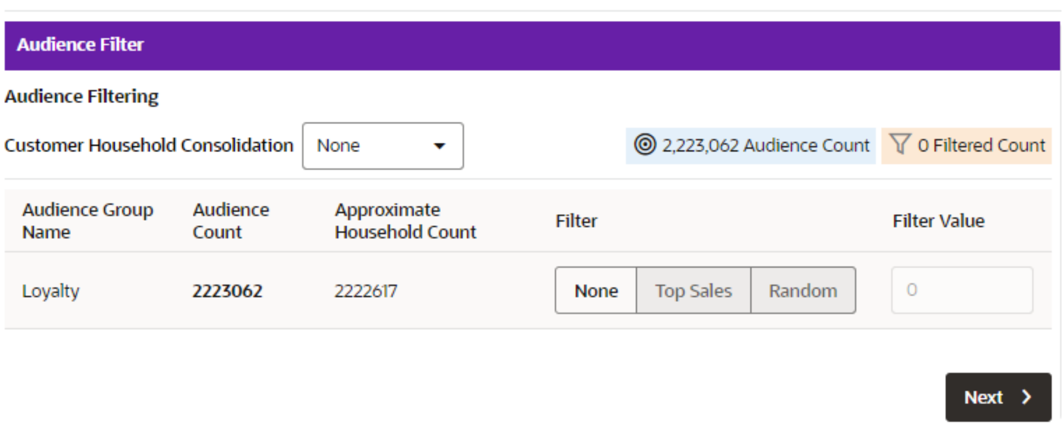
Exclude Audience Groups - If you wish to exclude certain groups of customers that may also be a part of the Included Group, you can do that by selecting the **Exclude Audience Groups** link, which opens a new section in the Audience Definition window

- Select the **Exclude Audience Groups** link.
- Click **+ Add Audience Group**.
- Select an Available List type.

- - **All** – Default group listing.
  - **Stratified** – The Customers within a Stratified list are divided into levels.
  - **Unstratified** – The Customers within an Unstratified list are not differentiated into separate groups.
  - **Personal** – User created groups.
- In the Search field, enter some or all of the **List Name**, **ID**, or **Strata Name**.
- Click **Search**.
- The results can be sorted by using the **Sort by list** menu with the following options:
  - Last Updated
  - Name
  - Customer Count
- Enter a **Group Name**.
- Click **Add** to add the selection Assigned Audience Lists.
- Click **Add** for another list means you are using the condition **AND**. Both conditions must be met.
- Click **OK and Add Another** to keep you in the same window and use the condition OR. One or more of the conditions must be met when you click **Add** for another Audience Group.

22. When finished entering all Audience Groups for the Promotion, click **Next.**
    - If the Selection Method selected in **Step 21**, is Static, continue to the next tab, the **Filtering Audience** tab.
    - If the Selection Method selected in **Step 21** is Dynamic, continue to **Step 27**, the **Control Groups** tab.
23. Enter the following for the **Filtering Audience** tab.

Figure 6-162 Filtering Audience Tab

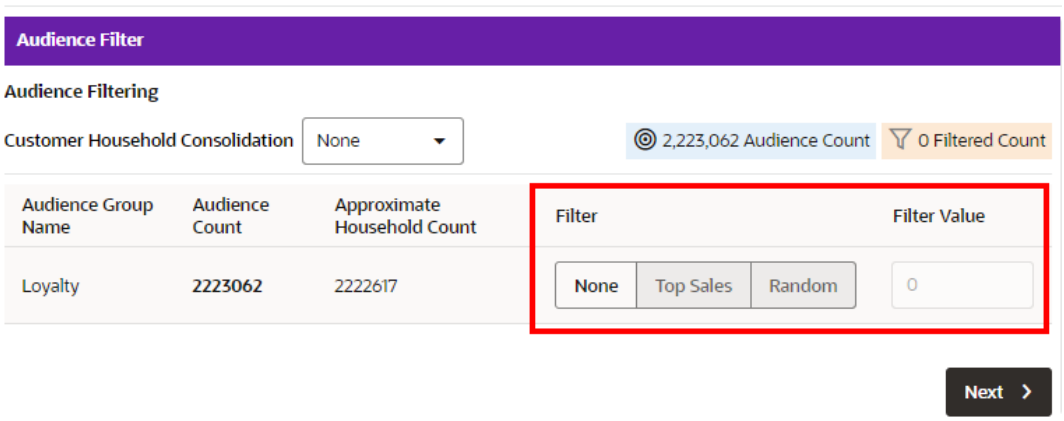


Use the **Customer Household Consolidation Selection Menu** to indicate whether the Promotion will use household consolidation, and the rule for determining the Customer who is the head of household.

- **None** – Do not perform household filtering.
- **LT Sales** – Select head of household based on amount purchased over the lifetime of their account.
- **LT Transaction Count** – Select head of household based on lifetime number of transactions.
- **Last Transaction Date** – Select head of household based on the Customer who performed the most recent transaction.
- **Customer Attributes** – Select head of household based on the Customer's numeric attributes.

Select the **Filter Type** for each Audience:

Figure 6-163 Select Desired Filtering

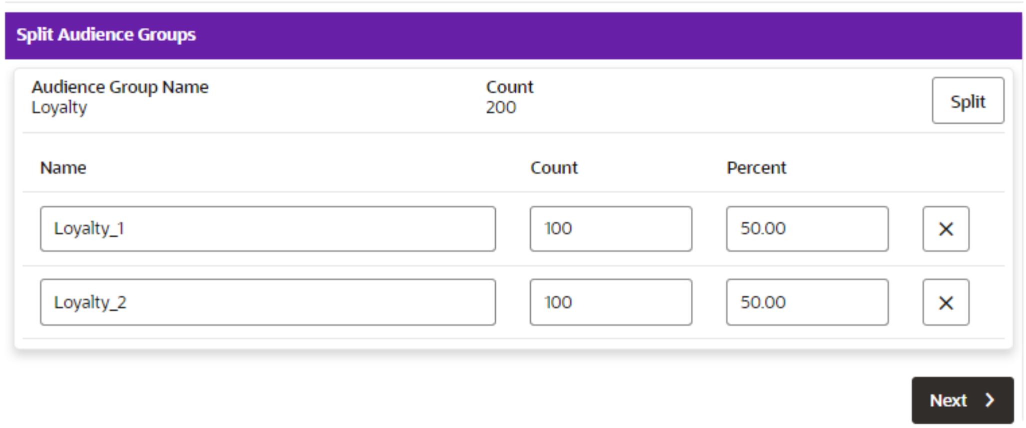


- **None** - [DEFAULT] All Customers in the Audience Group are eligible.
- **Top Sales** - Customers from the Audience Group will be chosen for eligibility by the greatest total amount of purchases.
- **Random** - Customers from the Audience Group will be chosen randomly for eligibility.

Enter a **filter value** to indicate the number of customers eligible for the promotion.

24. When finished entering any household filtering for the Audience Groups for the Promotion, click **Next** to continue to the **Split Audience** tab.
25. In the Split Audience tab, filtered audiences can, optionally, be split into smaller, separate audiences. If desired, create splits for the filtered audiences on the promotion.
    - Click **Split**.

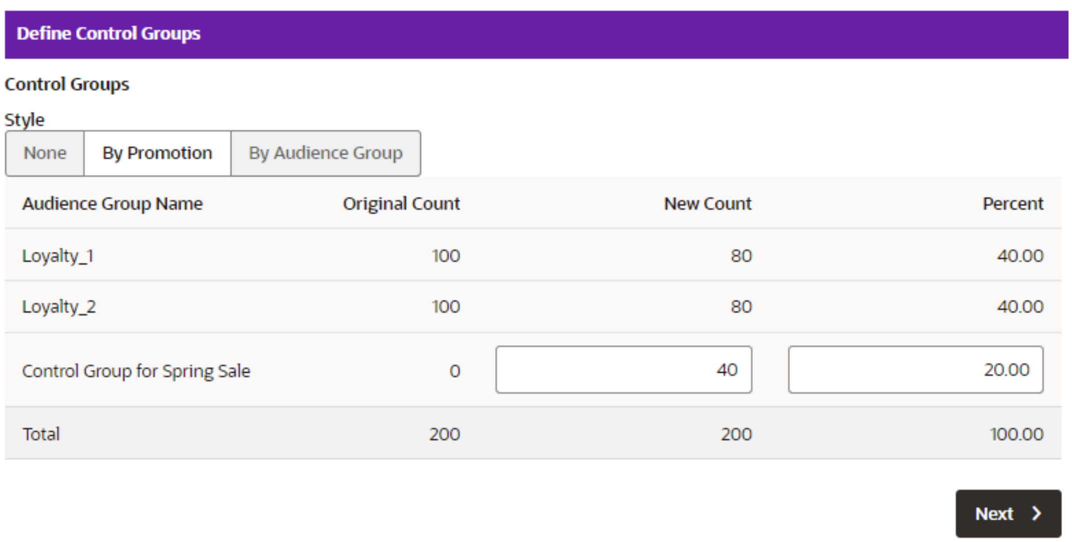
Figure 6-164 Split Audience Groups



- The Split Name field is automatically populated from the name of the Audience Group Name. If desired, you can change the name of the splits in this step.
- Select **Split** to automatically divide the Audience Group into equal portions and percentages. If you desire different portions or percentages for the splits, enter either a count or a percentage, and the corresponding field will update.

26. When finished entering any Audience Group splits for the Promotion, click **Next** to continue to the **Control Groups** tab.
27. Enter the following information for the **Control Groups** tab.

Figure 6-165 Define Control Groups



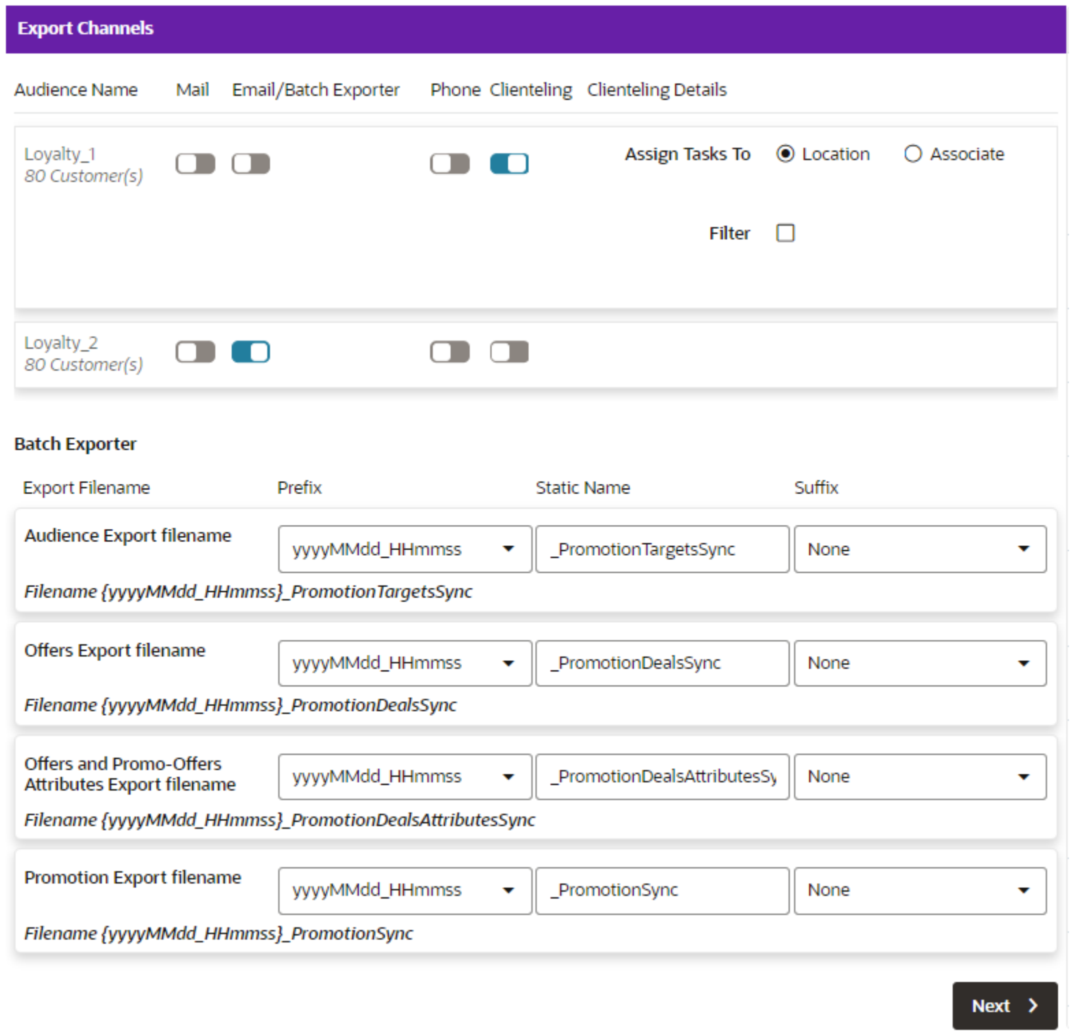
The control group is a statistically identical group that doesn't receive the offer. Following the promotional period, the results of the two groups are compared and you can determine if the offer generated incremental revenue. Options include:

- **None** – No Control Group
- **By Promotion** – Enter either a New Count or Percent. The corresponding field will update automatically to determine the size of the control group.

- **By Audience Group** – Enter either a Control Group count or percentage for each split created earlier. The corresponding field will update automatically.

28. When finished entering any Control Groups for the Promotion, click **Next** to continue to the **Export Channels** tab.
29. Enter the following information for the **Export Channels** tab. The options include:

Figure 6-166 Export Channels Tab



Mail - Determines whether the Customers in the Split/Control Group will be contacted by Mail.

EMail / Batch Exporter - Determines whether the Customers in the Split/Control Group will be contacted by Email.

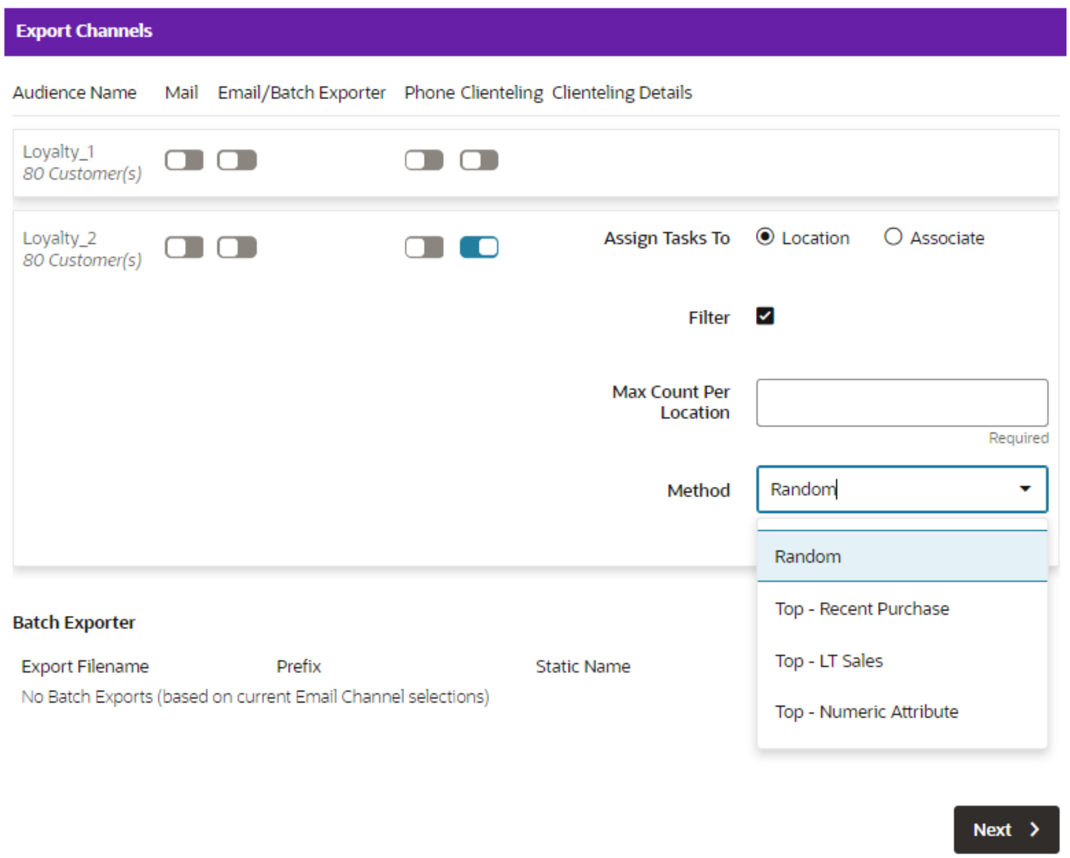
> **Note:**
>
> The system configuration setting *SupportedBatchExporters* determines if the Batch Exporter section is displayed.

- Export Filename – Name of the file.
- Prefix – Indicates the format of the datetime stamp used as a prefix the filename. Optional. Possible settings are yyyyMMdd_HHmmss, yyyy-MMdd_HHmmss, or none.
- Static Name – The identifying filename.
- Suffix – Indicates the format of the datetime stamp used as a suffix the filename. Optional. Possible settings are yyyyMMdd_HHmmss, yyyy-MMdd_HHmmss, or none.
- Filename – Displays an example of the export file name with the prefix and suffix format, if any.

Phone - Determines whether the Customers are contacted by phone.

Clienteling – When the Clienteling switch is turned on, tasks will be created based on the assigned associates or locations for the defined target audience when the promotion is generated.

Figure 6-167 Clienteling Details



Assign Tasks to:

- **Location Channel** – Tasks are assigned to a Location.
- **Associate Channel** – Tasks are assigned to an associate in a location.

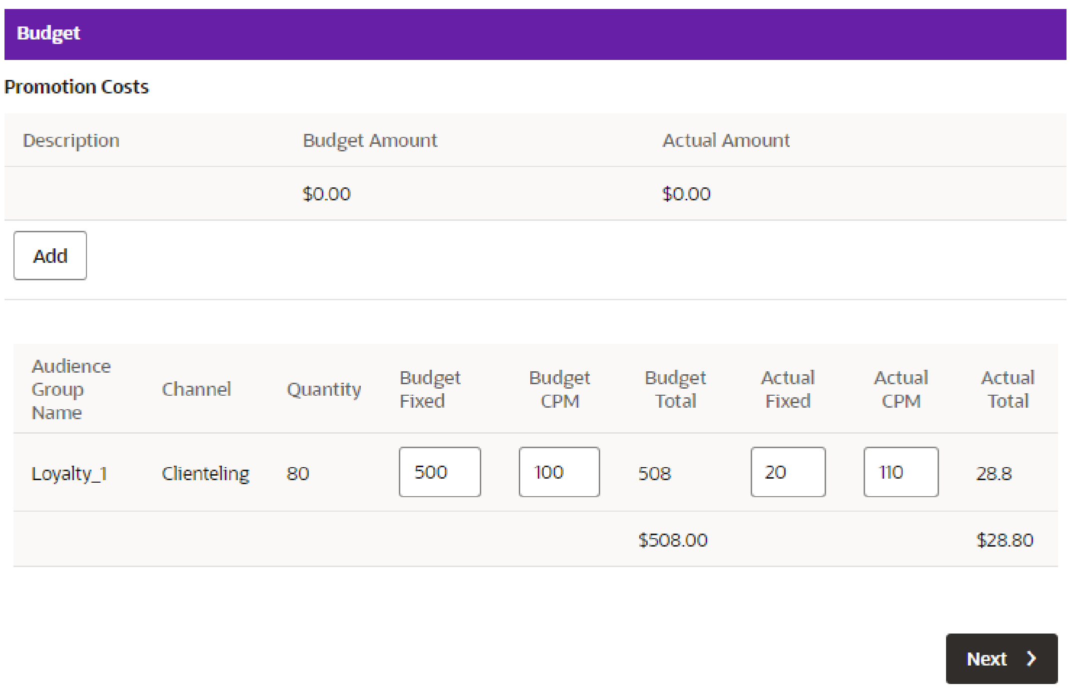
The following fields are enabled if the Filter option is selected:

- **Max Count Per <type> -** Determines the maximum number of target Customers that will be contacted through the channel.

- **Method** - Method used to select the Customers contacted. Options include:
  - **Random** - Select Customers Randomly (Default).
  - **Top - Recent Purchase** - Filter the Customers based on the most recent purchases.
  - **Top - LT Sales** - Filter the Customers based on the largest amount purchased over the lifetime of their account.
  - **Top - Numeric Attribute** - Filter the Customers based on the highest attribute value for a selected numeric attribute. If this option is selected, an additional Channel Filter option, Attribute, displays. Attribute is the numeric attribute used to determine the customers contacted

30. When finished entering any Export Channels for the Promotion, click **Next** to continue to the **Budget** tab.
31. Enter the following information on the **Budget** tab.

Figure 6-168 Budget Tab



a. Click **Add** to enter the Promotion Costs. Enter values in any field is optional.
b. Enter a **Description** of the cost item.
c. Enter the **budgeted amount** for the Promotion in the Budget Amount field.
d. Enter the **actual amount** for the Promotion in the Actual Amount field.
e. Click **Add** if you wish to enter another budget line for the promotion, then follow **steps a-d** to complete the fields.

   If Export Channels were selected for the audience group, the Audience Groups Costs section appears. Entering values in any field is optional.

Figure 6-169 Audience Group Costs

Audience Group Name	Channel	Quantity	Budget Fixed	Budget CPM	Budget Total	Actual Fixed	Actual CPM	Actual Total
Loyalty_1	Clienteling	80	500	100	508	20	110	28.8
Loyalty_2	Email	80			0			0
					$508.00			$28.80

f. In the Budget-Fixed field, enter the **fixed cost budgeted** for the audience.

g. In the Budget-CPM field, enter the **cost budgeted** for the Channel for each 1,000 Customers.

h. In the Actual-Fixed field, enter the **actual fixed cost** of the Channel.

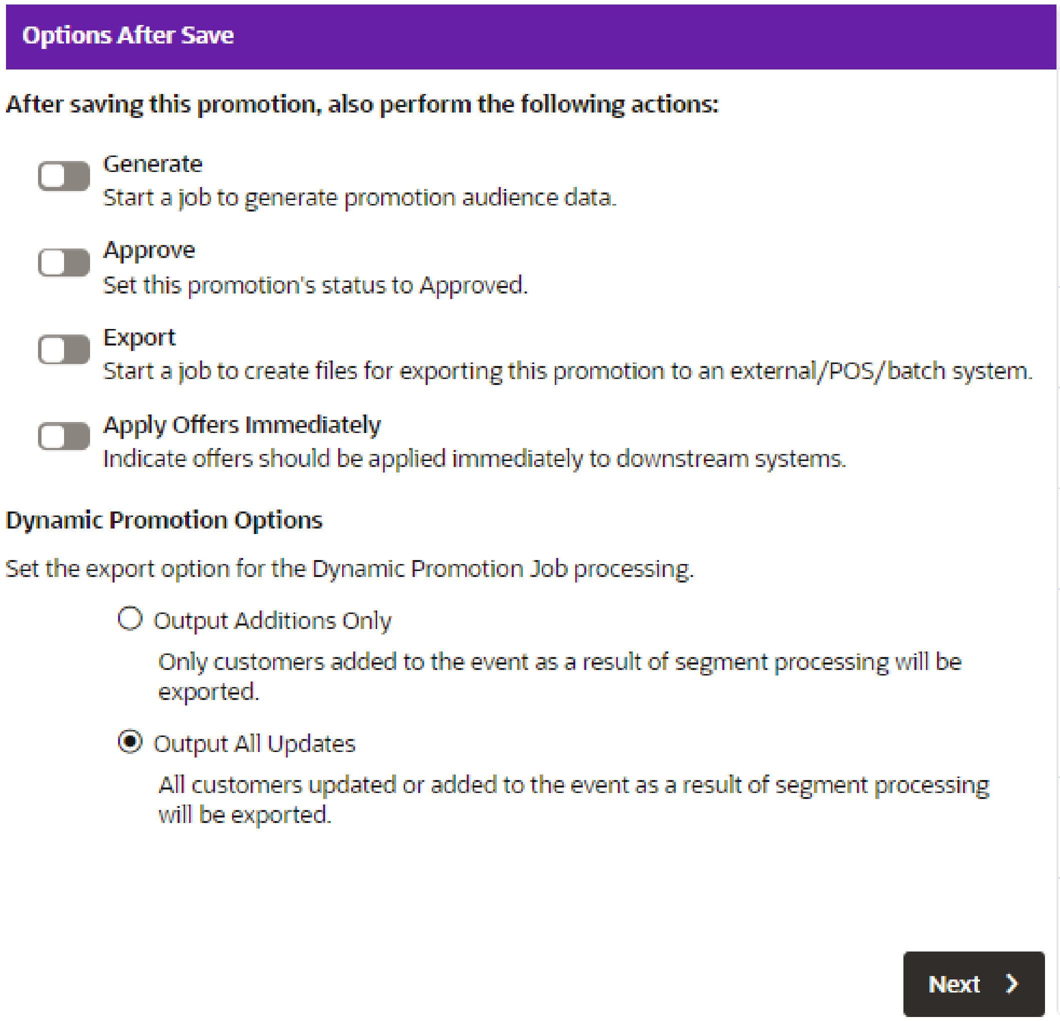
i. In the Actual-CPM field, enter the **actual cost** of the Channel for each 1,000 Customers.

j. Repeat **steps f-i** for each Target Channel in the Promotion.

32. When finished entering any Budget Costs for the Promotion, click **Next** to continue to the **Save Options** tab.

33. Enter the following information in the **Save Options** tab. You can enter more than one choice.

Figure 6-170 Options After Save Tab

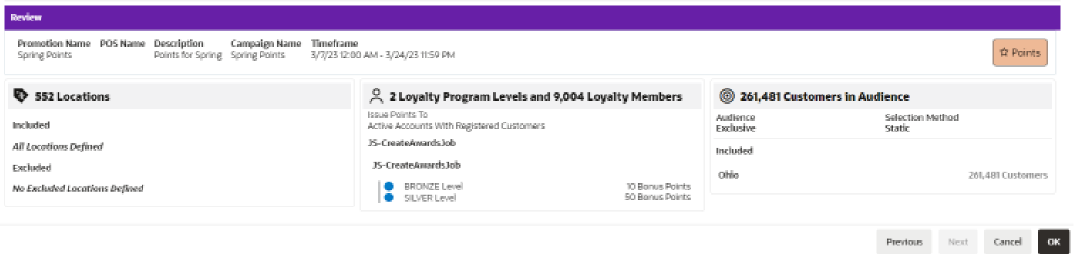


- **Generate** – Start a job to generate promotion audience data.
- **Approve** – Set this promotion's status to Approved.
- **Export** – Start a job to create files for exporting this promotion to an external/POS/batch system. This option automatically approves the Promotion.
- **Dynamic Promotion Options** – Select one of the two export options for processing when using the Dynamic selection method on the Audience tab.

> **Note:**
>
> Depending on the type of promotion that you created, different Options After Save are available.

34. When finished entering any Save Options for the Promotion, click **Next** to continue to the Coupon Review tab.
35. The **Review** tab displays the key elements in the Promotion Setup.

Figure 6-171 Review Tab



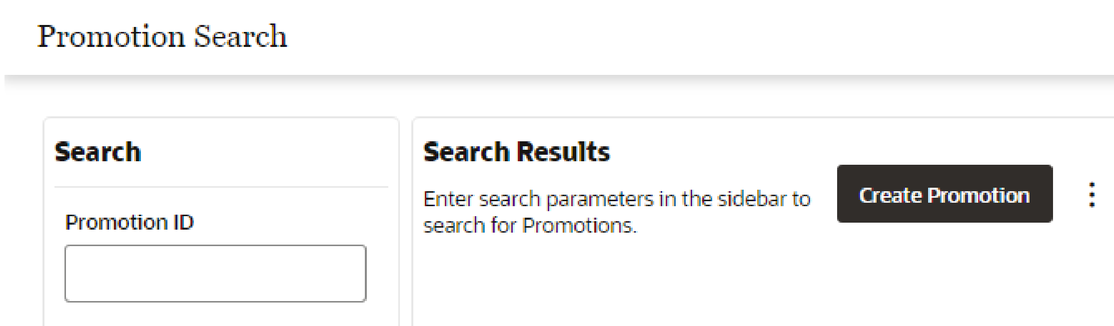
36. Click **OK** to save the Promotion, or click **Cancel** to close the promotion without saving. Click **Previous** or any **Tab** to return to any point of the Create Promotion process.

Creating a Bounceback Promotion

There are a few choices available to start the process of creating a promotion. The **Create Promotion** button is available in both the Promotion Home window as well as the Promotion Search window.

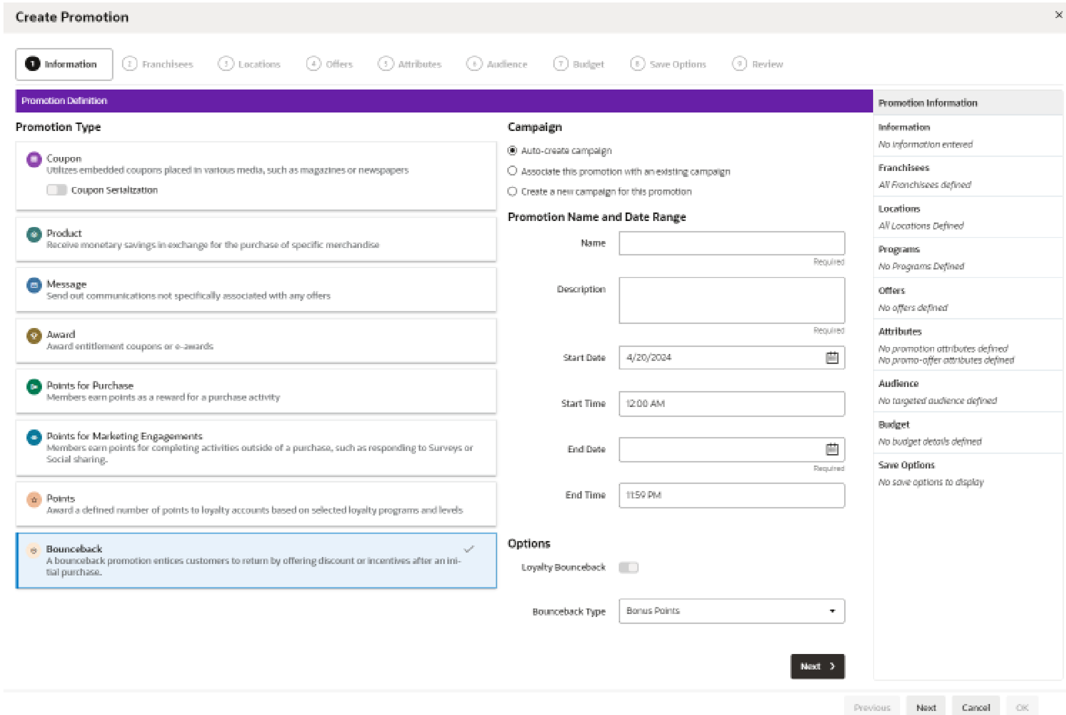
> **Note:**
>
> You will need the Promotion Home role to access the Promotion Home window.

Figure 6-172 Promotion Search



1. Click **Create Promotion,** which opens up the Promotion wizard to the Information tab.

Figure 6-173 Information Tab - Bounceback



2. Select the **Promotion Type**: Bounceback

> **Note:**
>
> Contact your administrator if you do not see the Promotion Types needed for your promotion.

3. Select **one** of the choices for the Campaign.
   - **Auto-create Campaign** – The campaign is automatically created and will use the same name and description from the promotion name and description.
   - **Associate this promotion with an existing campaign** – Uses existing campaigns in the system.
     – Click the **list arrow** and select an existing campaign.

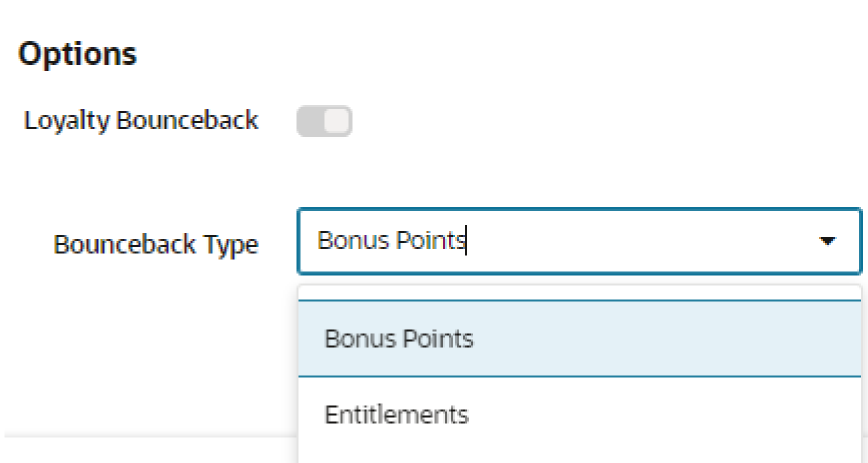
     > **Note:**
     >
     > The Start Date and End Date display underneath the Existing Campaign list.

   - **Create a new campaign for this promotion** – A new campaign will be created with this promotion being the first added.
4. Enter the following information:
   - Enter a **Campaign Name** (for new Campaigns only).
   - Enter a **Description** (for new Campaigns only).

- Enter a **Name**.
- Enter a **Description**.
- Select a **Start Date**.
- Select a **Start Time**.
- Select an **End Date**.
- Select an **End Time**.

5. **Loyalty Bounceback** ON by default.

Figure 6-174 Loyalty Bounceback - Activated

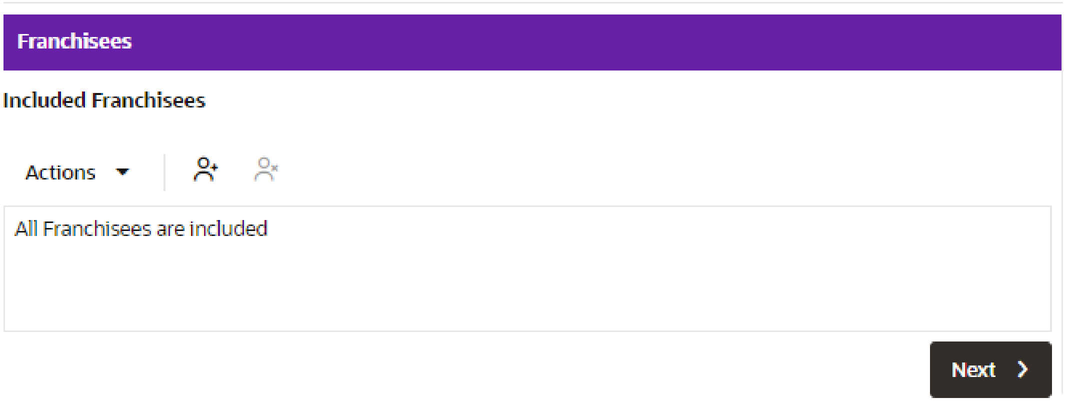


- Select a **Bounceback Type**.
  - Bonus Points
  - Entitlements

> **Note:**
>
> Loyalty Bounceback configuration occurs in **Step 12**, the **Offers** tab in Creating a Coupon Promotion.

6. By default, all franchisees are assigned to the promotion. To make changes to those assignments, do the following:

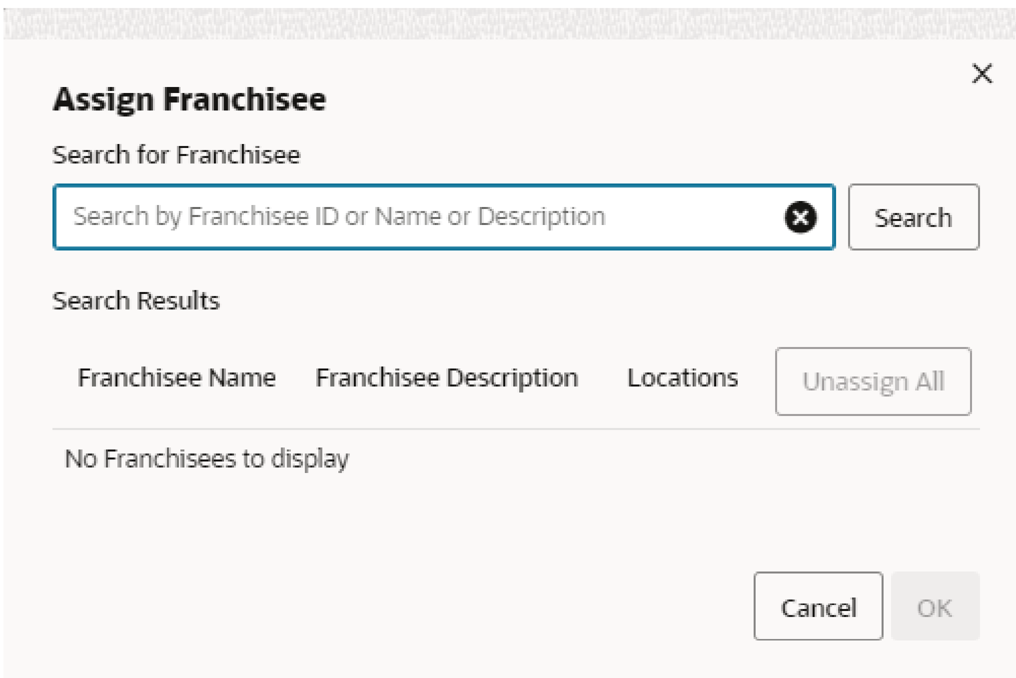
Figure 6-175 Franchisees Tab



Assigning a Franchisee

a. Click the **Actions Menu**, then, click **Assign**, or click the **Add (+)** icon. This opens the Add Franchisee window.

Figure 6-176 Assign Franchisee



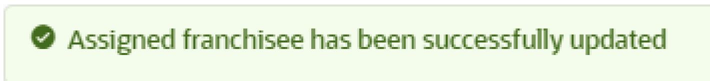
b. In the Search for franchisee search box, enter part or all of the **Name**, **ID**, or **Description**, then click **Search**.

> **Note:**
>
> You can also leave blank and click Search to return all Franchisees.

c. To change the assignment from ALL (which is defaulted) click **Assign** on just the specific franchisees you wish to assign for this promotion. Only Franchisees associated with the user are displayed in the list.

d. Click **OK** to accept the changes or **Cancel** to close the window without saving.

Figure 6-177 Confirmation Notification



> **Note:**
>
> A confirmation notification appears to confirm the franchisee has been assigned.

Deleting a Franchisee

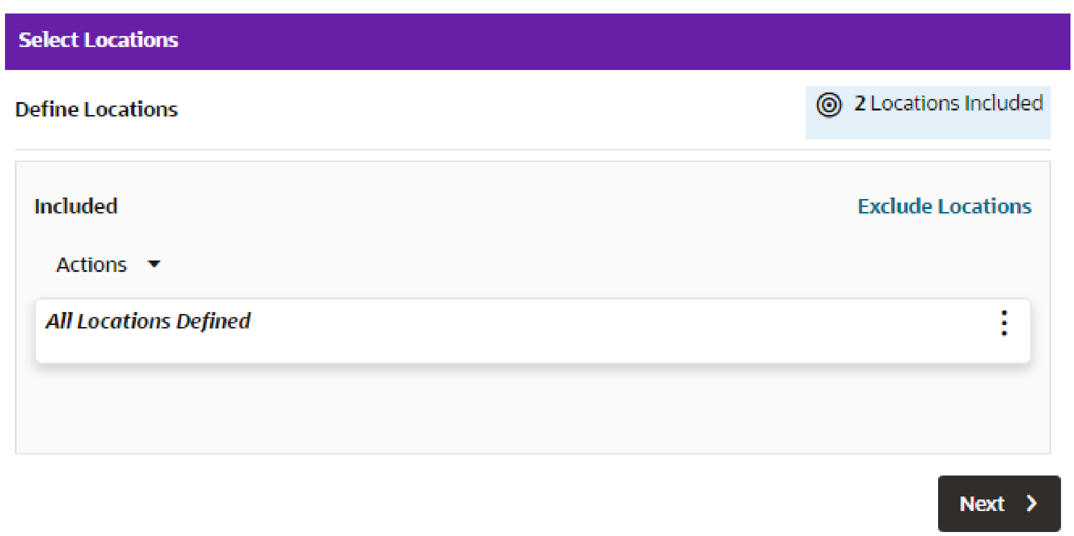
a. In the included Franchisees window, highlight the desired **row**.

b. Click the **Action Menu**, and click **Delete**, or click the **X** icon.

> **Note:**
>
> A confirmation notification appears to confirm the franchisee has been deleted.

7. When finished entering the Franchisees information, click **Next** to continue to the **Locations** tab.
8. Enter the following for the **Locations** tab:

Figure 6-178 Locations Tab



Define Locations

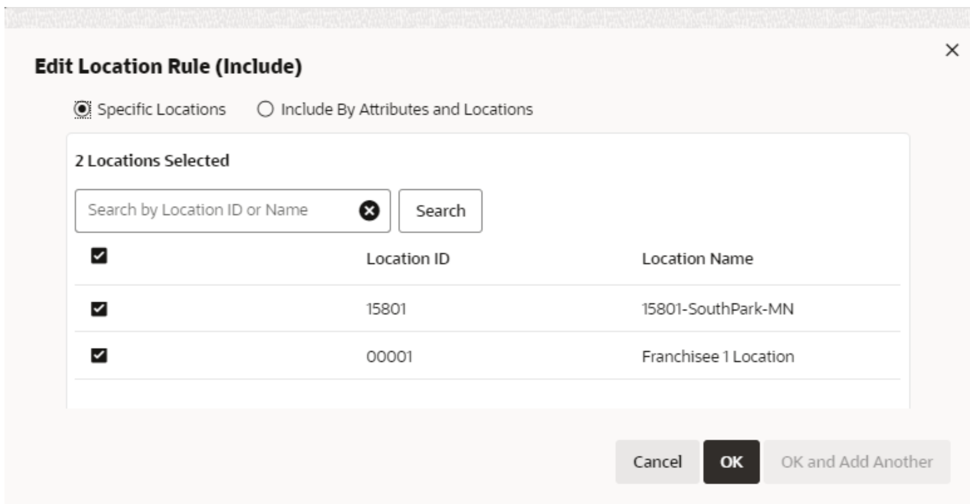
> **Note:**
>
> By default, **ALL** locations are added to the promotion. You can select the Overflow Menu to edit the list of locations to include.

- Included
  a. If you wish to change the Locations assigned to this Promotion, click the **Overflow Menu**, then click **Edit**. This opens the Edit Location Rule window.

  Specific Locations

  a. Click the **Specific Location** option.

Figure 6-179 Edit Location Rule (Include) - Specific Locations



> **Note:**
>
> The Location ID check box at the top of the list enables you to deselect or select all locations. If you deselect all the locations, then you can scroll through the list or search for a specific location.

  b. Enter part or all of a **Location ID** or **Name**.

  c. Click **Search**.

  d. Click Add to select a location.

  e. Click **Add** for another location means you are using the condition **AND**. Both conditions must be met.

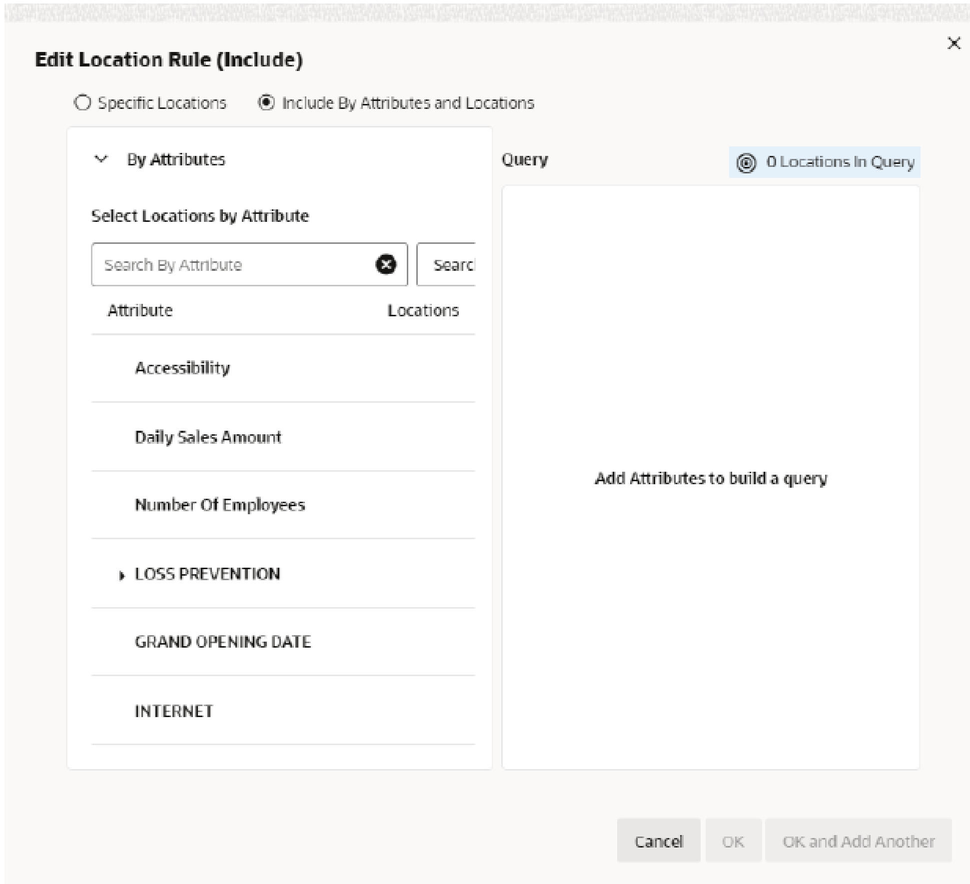
  f. Click **OK and Add Another** to keep you in the same search results and use the condition **OR**. One or more of the conditions must be met when you click **Add for another location**.

g. Click **Ok** to close the window, or click **Cancel** to close the window without saving.

Include by Attributes

a. Click the **Include by Attributes and Locations** option.

Figure 6-180 Edit Location Rule (Include) - Include by Attributes and Locations



> **Note:**
>
> A list of attributes enables you to add one more attributes in order to create a query to select only the locations that fit the requirements.

b. Click **Add** to select an attribute. Some Location Attributes can be collapsed or expanded. They will default to collapsed to allow you to scroll thru the list easier and expand the attributes they you to add.

c. Click **Add** for another attribute means you are using the condition **AND**. Both conditions must be met.

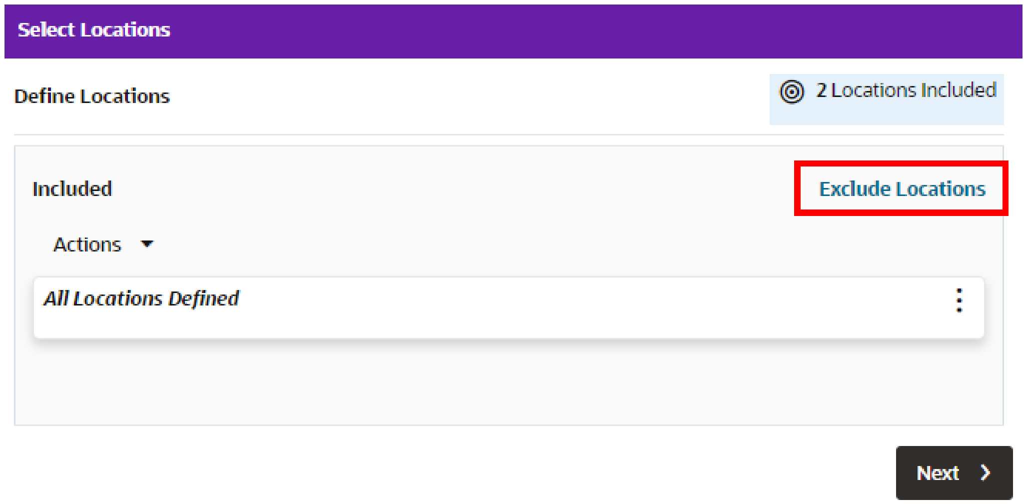
d. Click **OK and Add Another** to keep you in the same window and use the condition **OR**. One or more of the conditions must be met when you click the **Add** button for another attribute.

e. Click **OK** to close the window, or click **Cancel** to close the window without saving.

- Excluded Locations - This option allows you to select specific locations to exclude from the promotion.

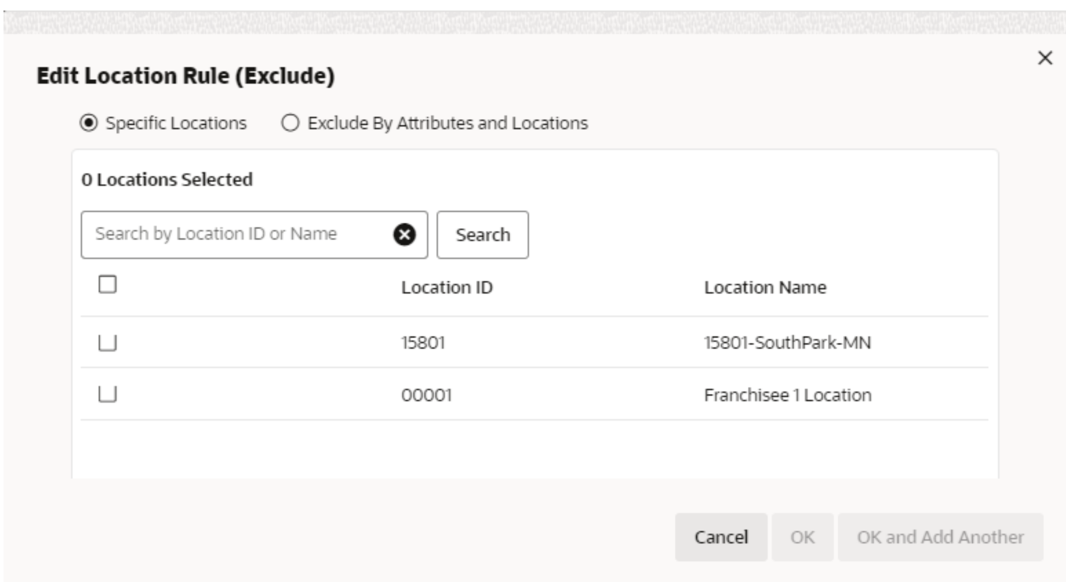
a. Click the **Exclude Locations** link.

Figure 6-181 Select Locations



Specific Locations

Figure 6-182 Edit Location Rule (Exclude) - Specific Locations



a. Click the **Specific Location** option.

> **Note:**
>
> The Location ID check box at the top of the list enables you to deselect or select all locations. If you deselect all the locations, then you can scroll through the list or search for a specific location.

b. Enter part or all of a **Location ID** or **Name**.

c. Click **Search**.

d. Click **Add** to select a location.

e. Click **Add for another location** means you are using the condition **AND**. Both conditions must be met.

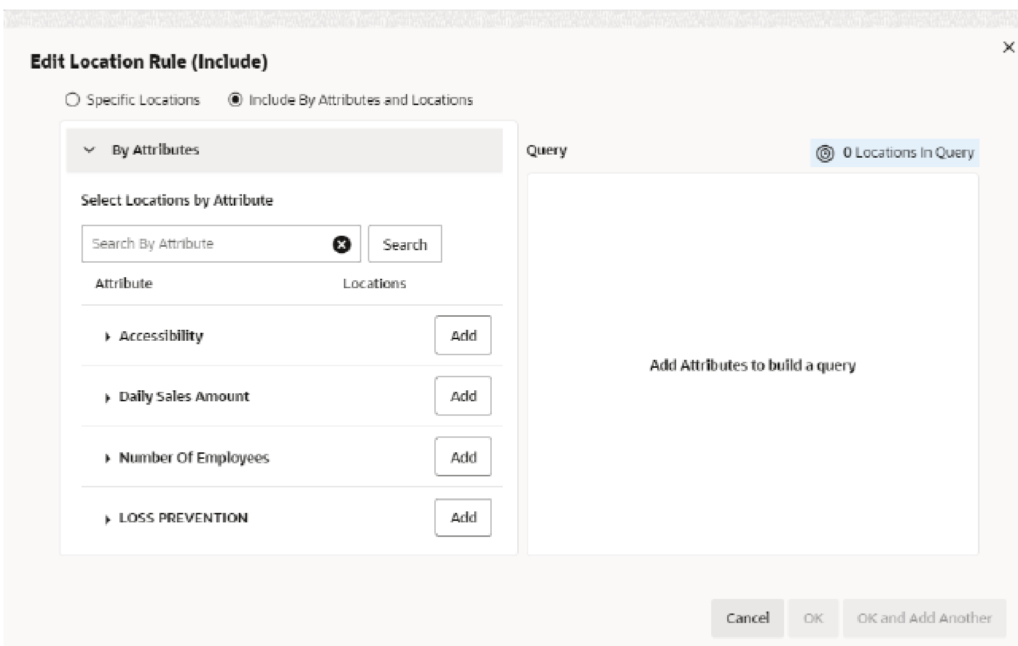
f. Click **OK and Add Another** to keep you in the same search results and use the condition **OR**. One or more of the conditions must be met when you click **Add for another location**.

g. Click **OK** to close the window, or click **Cancel** to close the window without saving.

Exclude by Attributes

a. Click the **Exclude by Attributes and Locations** option.

Figure 6-183 Edit Location Rule (Exclude) - Exclude By Attributes and Locations



b. Click **Add** to select an attribute. Some Location Attributes can be collapsed or expanded. They will default to collapsed to allow you to scroll thru the list easier and expand the attributes they you to add.

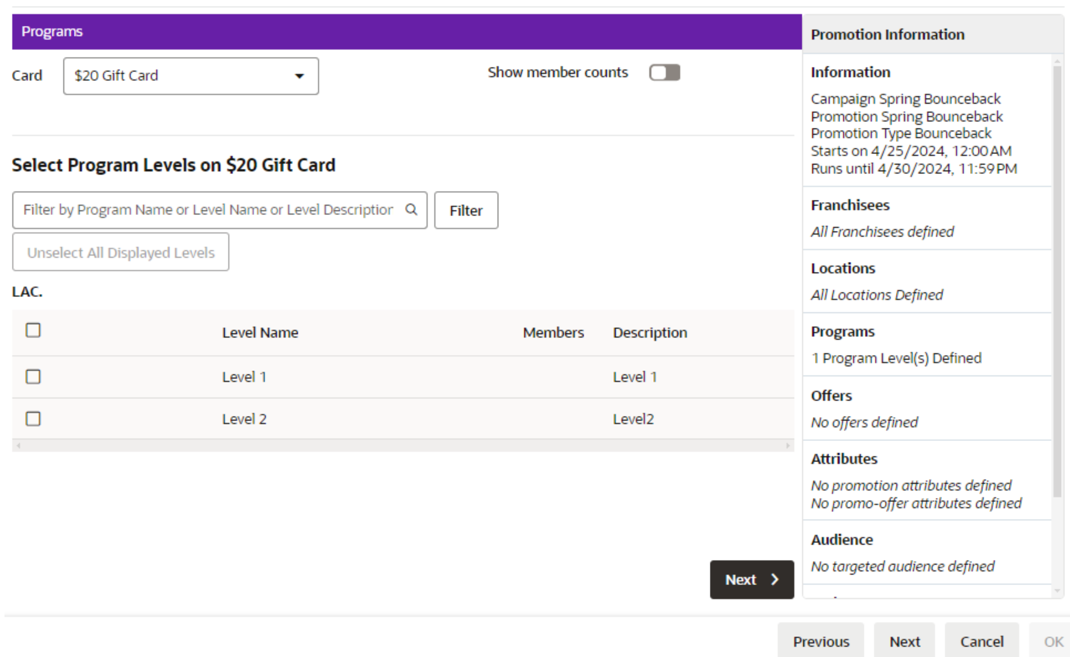
c. Click **Add for another** attribute means you are using the condition **AND**. Both conditions must be met.

d. Click **OK and Add Another** to keep you in the same window and use the condition **OR**. One or more of the conditions must be met when you click **Add** for another attribute.

e. Click **OK** to close the window, or click **Cancel** to close the window without saving.

9. When finished entering Locations for the Promotion, click **Next** to continue to the **Programs** tab.

Figure 6-184 Programs Tab - Bounceback



10. To begin the Programs tab, take the following actions:

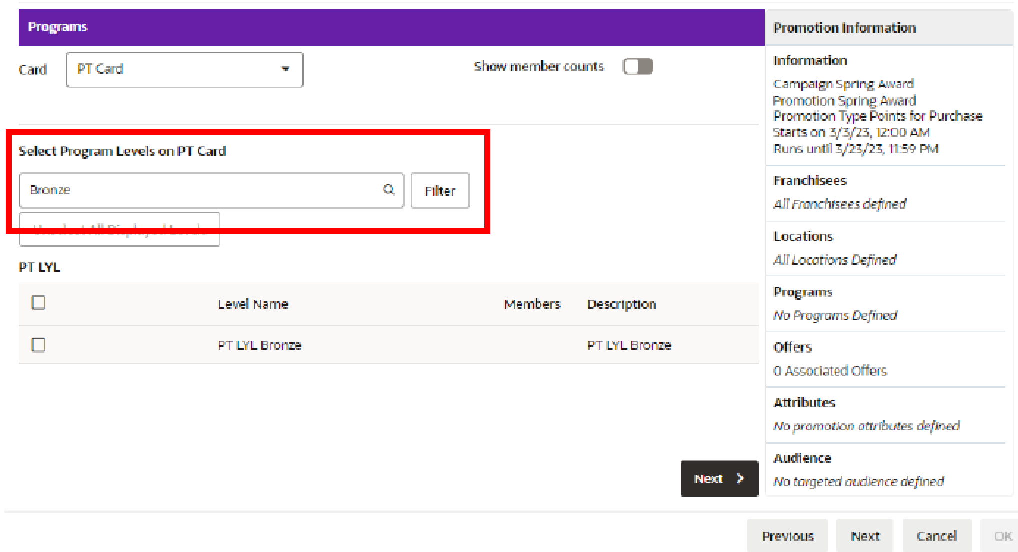
a. Select a **Card**.

A list of cards display all active cards for the user to select from. If there is only one card to select from, the card appears by default and the list arrow is unavailable for selection.

> **Note:**
>
> The Select Program Levels section title will contain the name of the card selected.

b. In the Filter for **Select Programs Levels on** field, enter all or part of the **Program Name**, **Level Name**, or **Level Description** of the specific loyalty program you want to search for.

Figure 6-185 Filter Results



c. Select one or more Loyalty Programs. The Deselect All Displayed Levels button clears all selections.

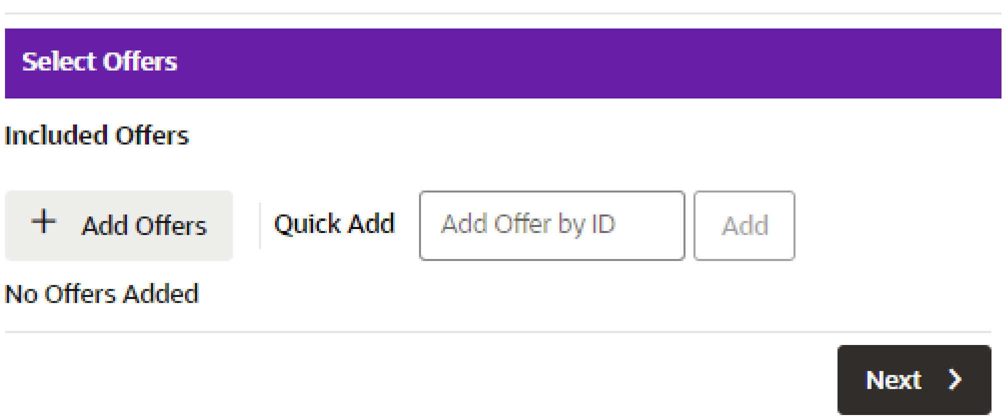
11. When finished selecting Loyalty Programs for the Promotion, click **Next** to continue to the **Offers** tab.

12. To begin the Offers tab, take the following actions:

    There are two methods to add offers, either:

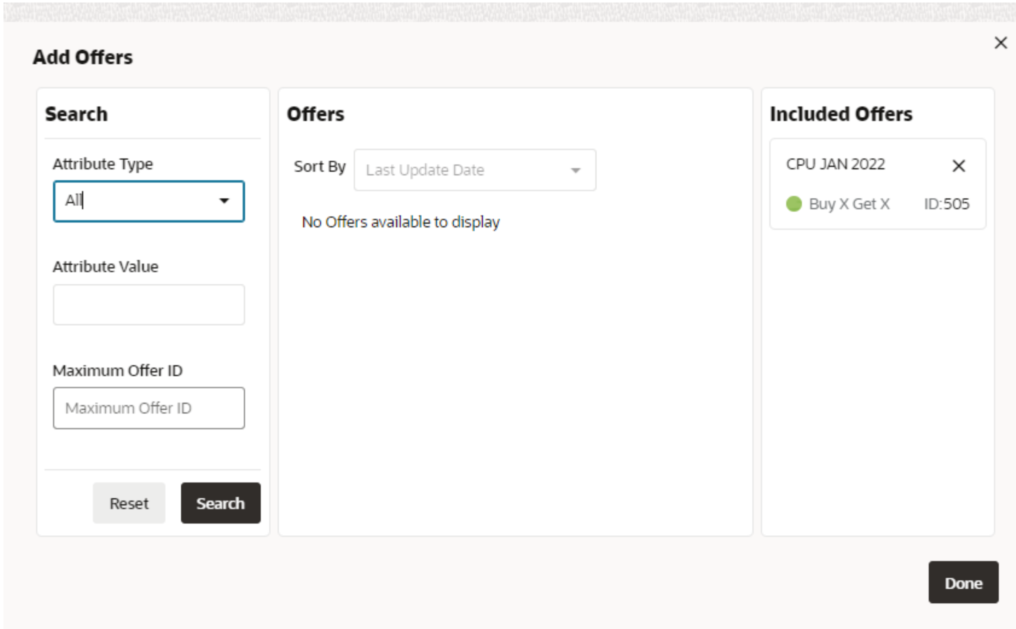
    - Select the **Quick Add** option to search for a known Offer ID.
    - Click **+Add Offers** for an Advanced Offer Search.

Figure 6-186 Offers Tab



- Click **+ Add Offers**. The Add Offers window enables you to search for offers to include in the promotion. Once you receive the results of the search you can sort the results, if desired for easier selection, before adding them to the promotion. Those offers appear in the Included Offers panel.

Figure 6-187 Add Offers - Bounceback



- In the Search section, enter any or all of the following information:
  - **Attribute Type** – Search for an Offer by the Attribute assigned to the Offer. The default is ALL.
  - **Attributes Value -** Type-ahead search according to the Attribute Type selected.
  - **Maximum Offer ID** – Highest Offer ID number you wish to limit the search to. This will return that offer ID and all others with a lower number.
  - **Offer ID** – This Text Field searches all the Offers currently present in the application. The default is an empty field.
  - **Offer Name** – Name of the Offer.
  - **Offer Type** – Search the Offer by Offer Type (Single Select). The value **Bounceback Trigger** is populated and disabled.
  - **Intended Use** – The type of Promotion associated with the Offer you are searching for. The value **Bounceback** is populated and disabled.
  - **Indented Industry** – The type of Industry associated with the Offer you are searching for.
- Click **Search**.

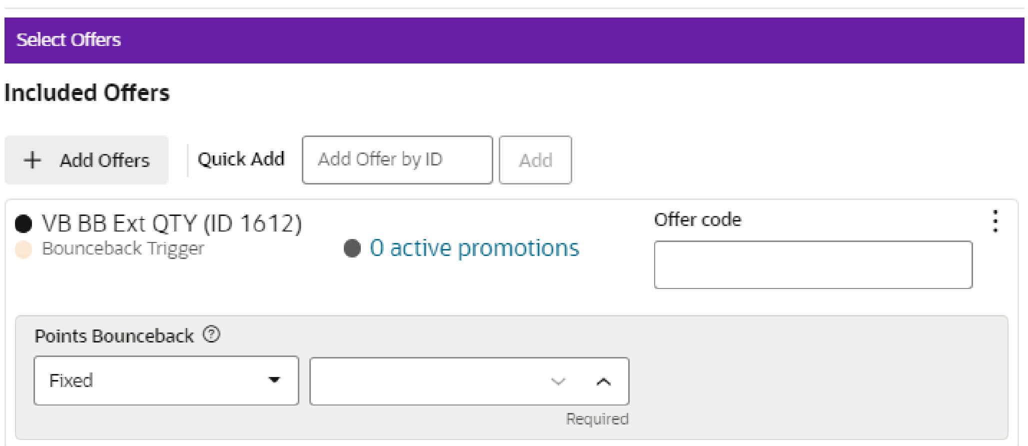
> **Note:**
>
> To retrieve all the offers in the system, select Search without entering any search criteria. All offers are returned to the Offers results section. From there, you can scroll through the list to choose which offers to add.
>
> To clear the search fields and restore default selections in the search page, click **Reset**.

- Upon selecting **Search**, the results display in the Offers section. Use the **Sort by list** to sort by the following options:

- Last Update Date
- Offer Name
- Offer Type
- Intended Use
- Offer ID

- In the Add Offers window, you can select any of the offers in the Include Offers section and remove them by selecting the **X** in the top right corner of the Offer. Click **Add** to include the offers in the promotion.
- When finished selecting offers to add to the Promotion, select **Done**, which returns you to the Select Offers window.
- On the Select Offers window, you can select the **Remove** option from the **Actions Menu** to remove an offer from the promotion.

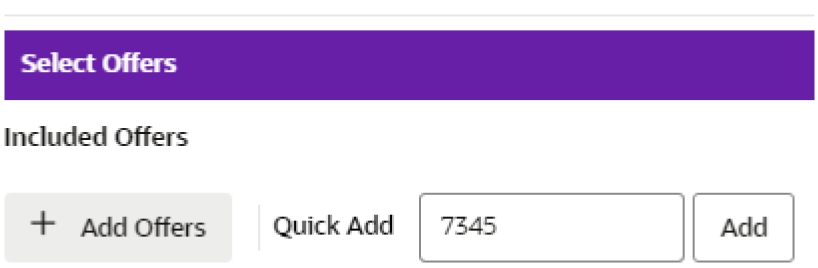
Figure 6-188 Offer Code



> **Note:**
>
> Some included offers enable the Offer Code Field. A retailer can use it to qualify or track a particular offer.

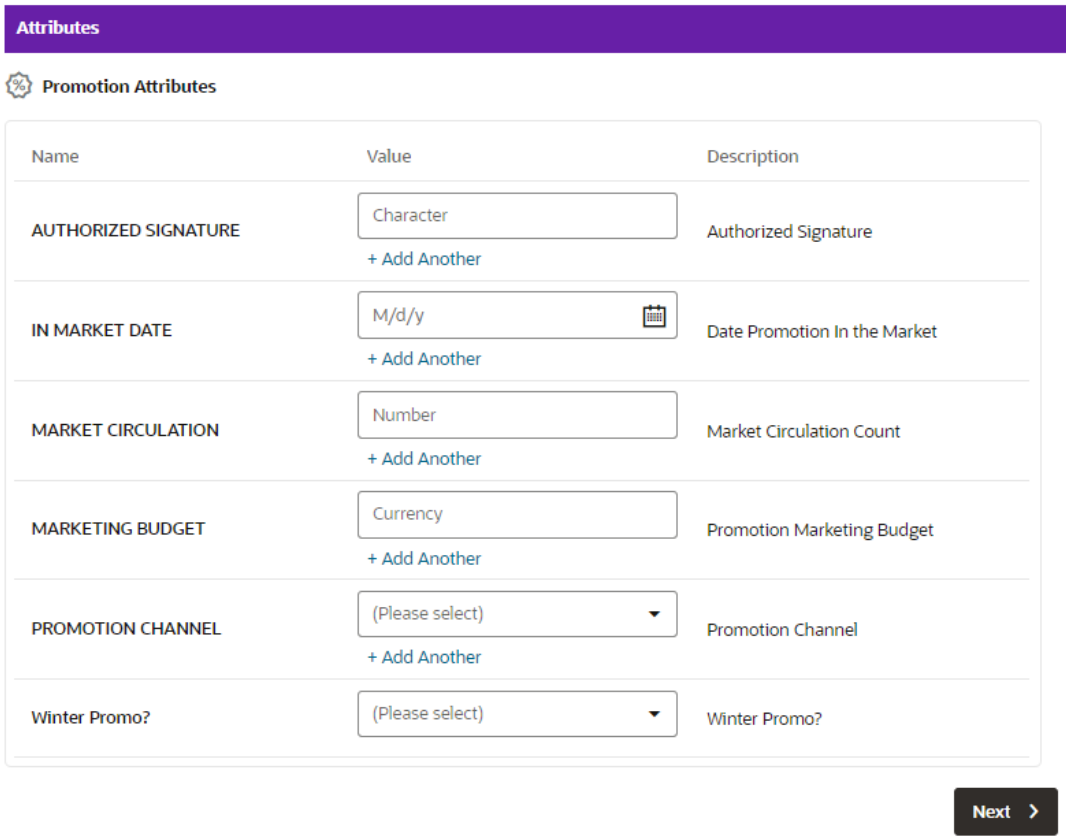
- Enter the **Offer ID** in the Quick Add field and then click **Add** to also add offers to a promotion.

Figure 6-189 Select Offers Quick Add



13. When finished entering Offers for the Promotion, click **Next** to continue to the **Attributes** tab.
14. Enter the following for the **Attributes** tab.

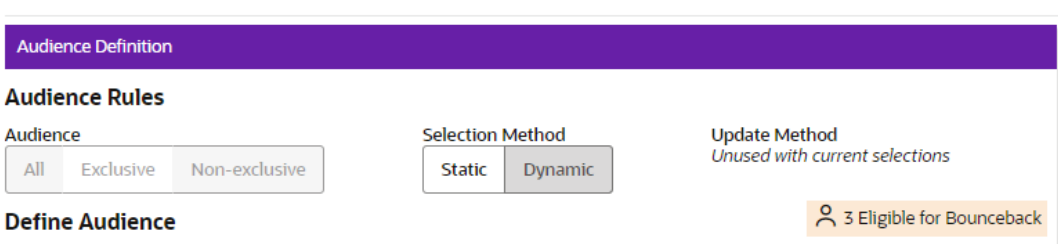
Figure 6-190 Promotion Attributes



- Complete values for any Promotion Attributes you want added to the promotion. Fields marked with an asterisk are required.

15. When finished adding Attributes for the Promotion, click **Next** to continue to the **Audience** tab.
16. Enter the following for the Audience tab.

Figure 6-191 Audience Tab



Audience Rules

- Audience – **Exclusive Targeting:** Required when a Bounceback promotion is selected. This is an exclusive targeted promotion, which means that only the customers you've identified in your target group are eligible to receive the promotion at the point of sale.
- Selection Method
  - **Static** – Only customers defined at this time are considered eligible for the promotion.
  - **Dynamic** – Dynamic can not only add customers but also remove customers that no longer apply. When **Dynamic** is selected, Update Method is available.

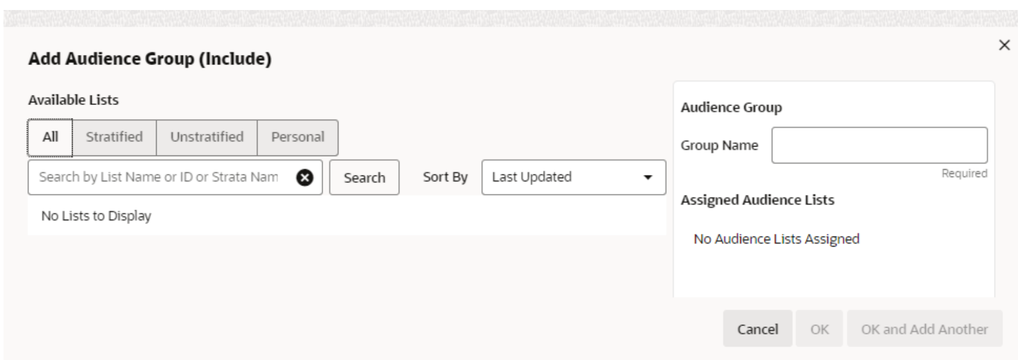
  New audience members will be added – When the Dynamic and Recurring Promotions job runs, any new customers found that meet the criteria, are added to the audience. All customers currently in the audience will remain in the audience.

  Audience members can be added and removed – When the Dynamic and Recurring Promotions job runs, any new customers found that meet the criteria, are added to the audience. Additionally, only the customers that meet the criteria will be included in the audience. If the customer is in the audience before the job runs, but no longer meets the criteria, the customer will be removed from the audience.

Define Audience - Included Audience Groups

a. Click + **Add Audience Group**.

Figure 6-192 Add Audience Group (Include)



b. Select an **Available List** type

   All - Default

   Stratified - The Customers within a Stratified list are divided into levels.

   Unstratified - The Customers within an Unstratified list are not differentiated into separate groups.

   Personal - Customers maintained by the user.

c. In the Search field, enter some or all of the **List Name**, **ID**, or **Strata Name**.

d. Click **Search**. The results can be sorted by using the Sort by list menu with the following options:

   Last Updated

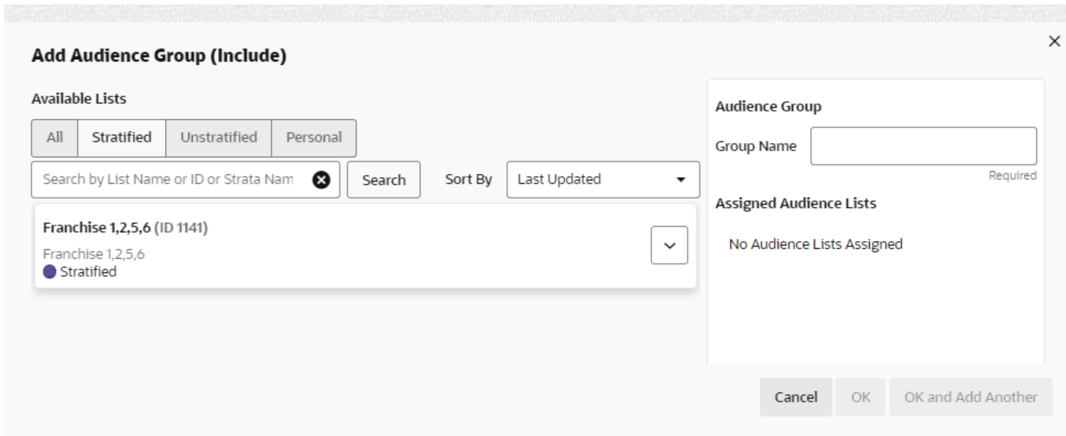
   Name

   Customer Count

e. Enter a **Group Name**.

When lists are added from the Available Lists area, they appear in the Audience Groups section of the window. The Audience Group section Group Name automatically defaults to the name of the first list added. You can change the Group Name to something more meaningful to describe the group of customers, if desired.

Figure 6-193 Add Audience Group (Include)

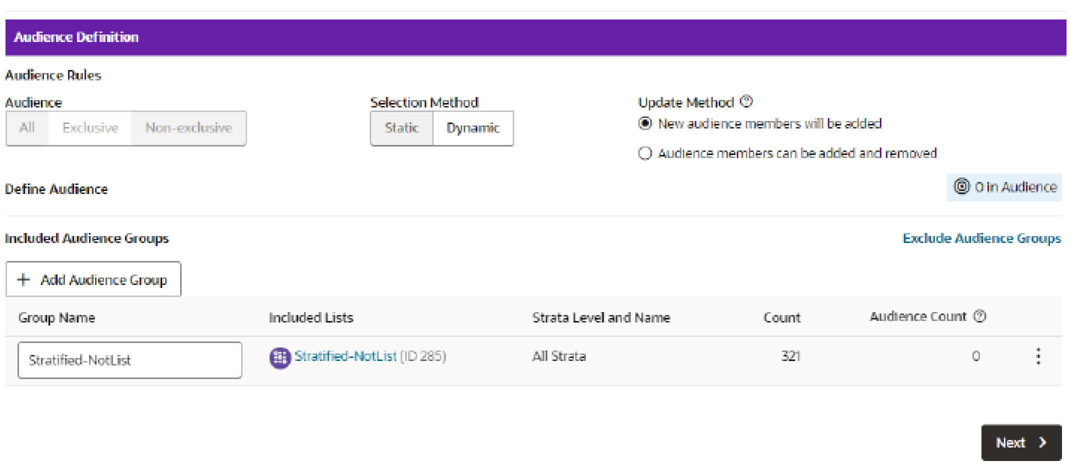


a. Click **Add** to add the selection Assigned Audience Lists.

b. Click **Add** for another list means you are using the condition AND. Both conditions must be met.

c. Click **OK and Add Another** to keep you in the same window and use the condition **OR**. One or more of the conditions must be met when you click **Add** for another Audience Group.

Figure 6-194 Audience Definition



As shown in the figure above, the Group Count is shown for each audience group. In the Audience Rules section the total count is provided on the right hand side.

Columns include the following details:

- Group Name
- Included Lists
- Strata Level and Name
- Count
- Audience Count

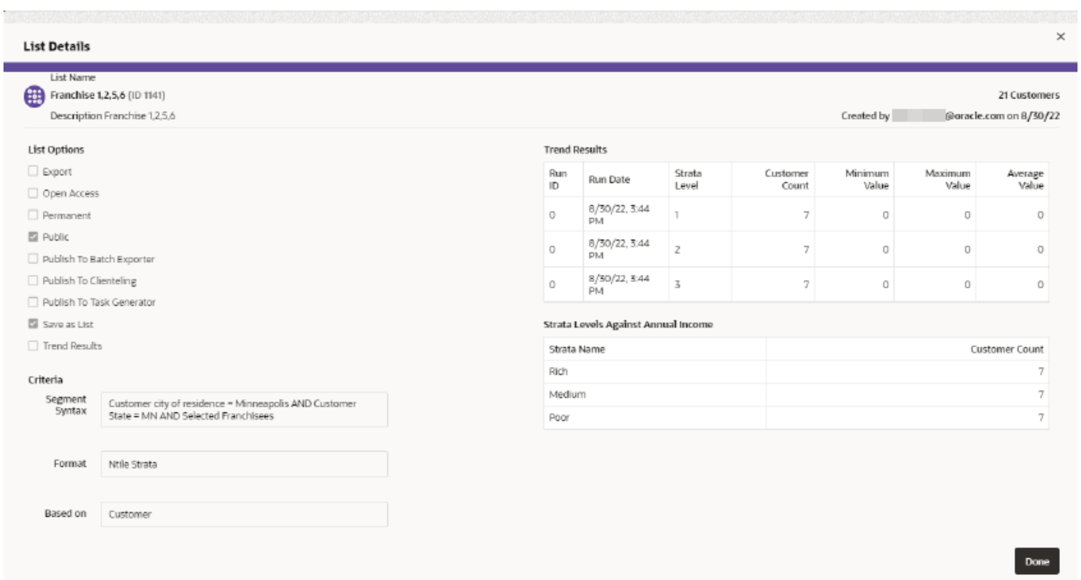
Each Group Name has an Overflow Menu Icon where you can Edit or Remove the Audience Group from the list.

The Included Lists column displays a link on that list (also known as a segment) and that link will open to the Audience List Details window.

In this window, the following sections may display, depending on the type of list and which of the options were selected when the list was created:

- List Options section
- Criteria section
- Trend Results section
- Strata Levels section
- Attributes section
- Franchisees section
- Message section
- Scheduled Jobs section

Figure 6-195 List Details



The checked List Options vary by the selections made when the list was created, and may include the following fields:

- **Export** – Indicates whether the Segment list is automatically exported after the Segment Query is run.

- **Open Access** – Indicates whether the Segment has Open Access.
- **Permanent** – Indicates whether the Segment is kept in the system, even if it meets the criteria for deletion by the housekeeping job.
- **Public** – Indicates whether the Segment is Public.
- **Publish to Batch Exporter** – Indicates whether the Segment has been made available for export to a Marketing system.
- **Publish to Clienteling** – Indicates whether the Segment has been made available to the Clienteling module.
- **Publish to Task Generator** – Indicates whether the Segment has been made available to the Task Generator Job.
- **Save as List** – Indicates whether a list of matching Customer IDs is created when the Segment is created.
- **Trend Results** – Indicates whether the results of the Segment run are kept to provide trend information about the Segment.

Figure 6-196 List Details Trend Results - Chart

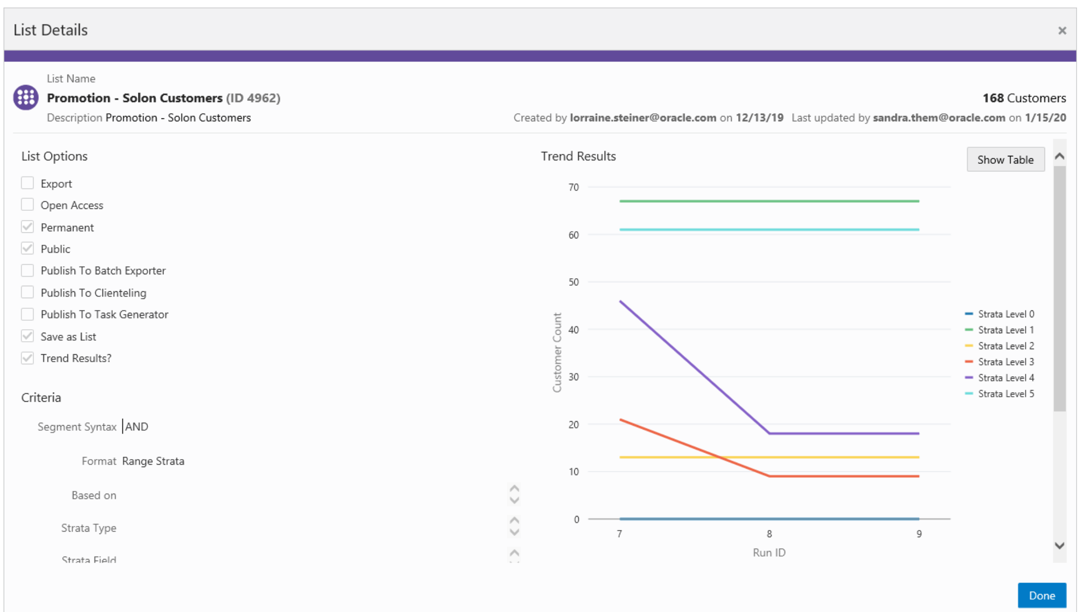


Figure 6-197 Trend Results Graph - Table

Trend Results

Show Chart

Run ID	Run Date	Strata Level	Customer Count	Minimum Value	Maximum Value	Average Value
95	1/29/21, 1:00 AM	1	99	0	0	0
95	1/29/21, 1:00 AM	2	92	0	0	0
95	1/29/21, 1:00 AM	3	93	0	0	0
94	1/27/21, 4:36 AM	1	99	0	0	0
94	1/27/21, 4:36 AM	2	92	0	0	0
94	1/27/21, 4:36 AM	3	93	0	0	0

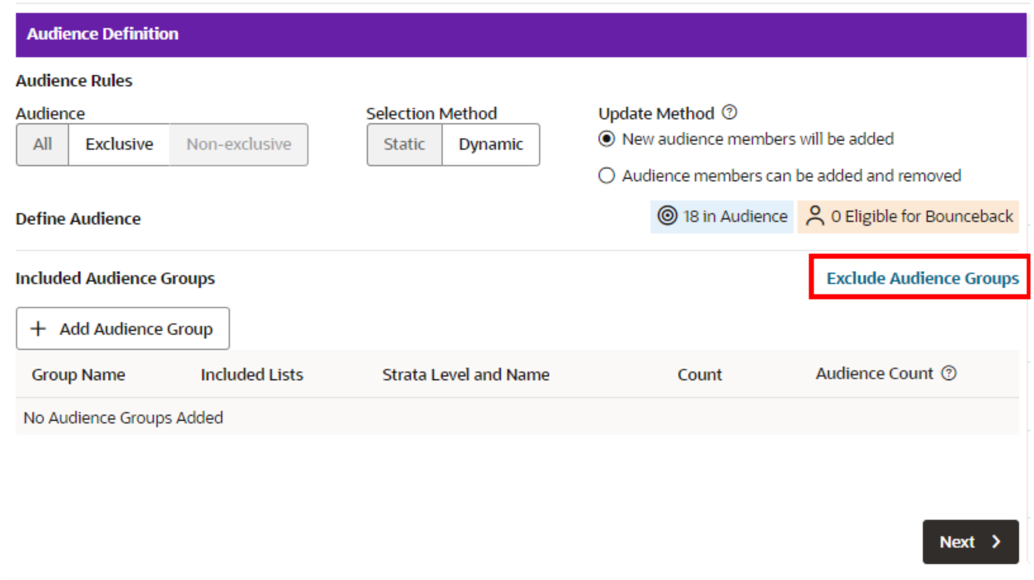
Figure 6-198 List Details Trend Results - Table

Strata Levels Against Annual Income

Strata Name	From (>=)	To (<)	Customer Count
Strata 1	0	50	2,216,204
Strata 3	51	>	6,858

- Click **Done** to close the Audience List Details window.

Figure 6-199 Audience Definition - Exclude Audience Groups

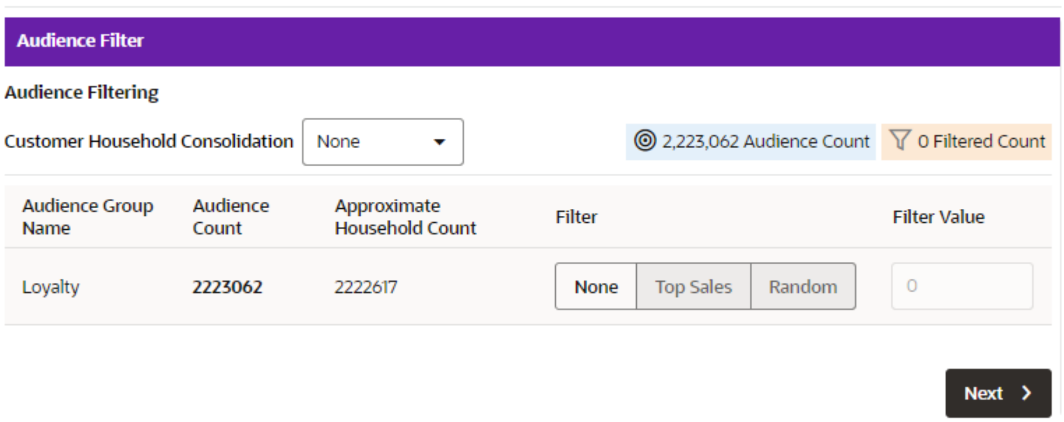


Exclude Audience Groups - If you wish to exclude certain groups of customers that may also be a part of the Included Group, you can do that by selecting the **Exclude Audience Groups** link, which opens a new section in the Audience Definition window

- Select the **Exclude Audience Groups** link.
- Click **+ Add Audience Group**.
- Select an Available List type.
-
  - **All** – Default group listing.
  - **Stratified** – The Customers within a Stratified list are divided into levels.
  - **Unstratified** – The Customers within an Unstratified list are not differentiated into separate groups.
  - **Personal** – User created groups.
- In the Search field, enter some or all of the **List Name**, **ID**, or **Strata Name**.
- Click **Search**.
- The results can be sorted by using the **Sort by list** menu with the following options:
  - Last Updated
  - Name
  - Customer Count
- Enter a **Group Name**.
- Click **Add** to add the selection Assigned Audience Lists.
- Click **Add** for another list means you are using the condition **AND**. Both conditions must be met.
- Click **OK and Add Another** to keep you in the same window and use the condition **OR**. One or more of the conditions must be met when you click **Add** for another Audience Group.

17. When finished entering all Audience Groups for the Promotion, click **Next**.
    - If the Selection Method selected, is Static, continue to the next tab, the **Filtering Audience** tab.
    - If the Selection Method selected is Dynamic, continue to **Step 22**, the **Control Groups** tab.
18. Enter the following for the **Filtering Audience** tab.

Figure 6-200 Filtering Audience Tab

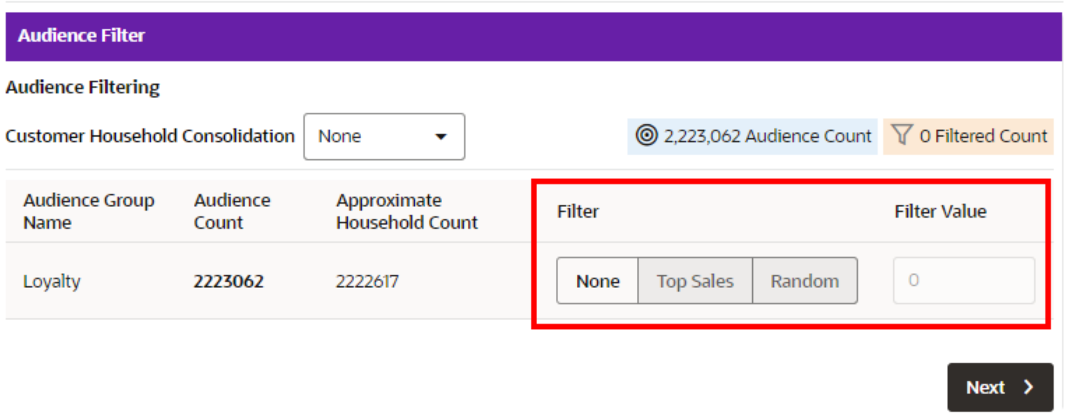


Use the **Customer Household Consolidation Selection Menu** to indicate whether the Promotion will use household consolidation, and the rule for determining the Customer who is the head of household.

- **None** – Do not perform household filtering.
- **LT Sales** – Select head of household based on amount purchased over the lifetime of their account.
- **LT Transaction Count** – Select head of household based on lifetime number of transactions.
- **Last Transaction Date** – Select head of household based on the Customer who performed the most recent transaction.
- **Customer Attributes** – Select head of household based on the Customer's numeric attributes.

Select the **Filter Type** for each Audience:

Figure 6-201 Select Desired Filtering

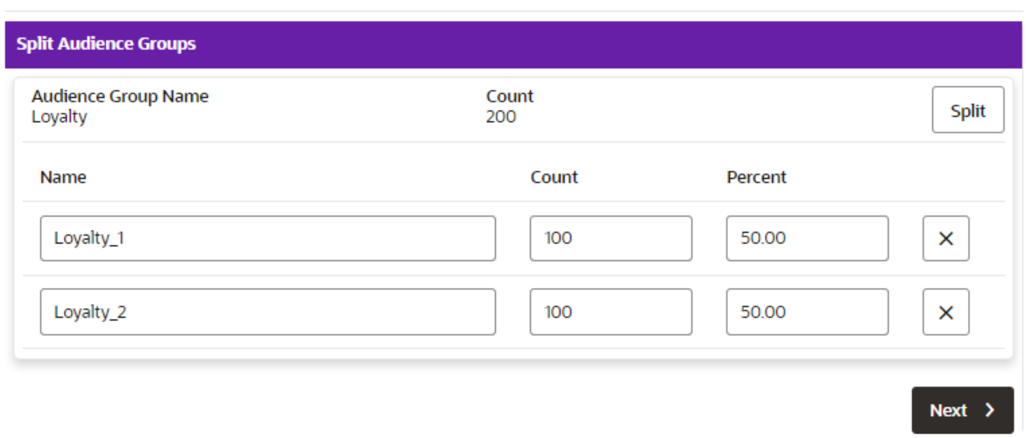


- **None** - [DEFAULT] All Customers in the Audience Group are eligible.
- **Top Sales** - Customers from the Audience Group will be chosen for eligibility by the greatest total amount of purchases.
- **Random** - Customers from the Audience Group will be chosen randomly for eligibility.

Enter a **filter value** to indicate the number of customers eligible for the promotion.

19. When finished entering any household filtering for the Audience Groups for the Promotion, click **Next** to continue to the **Split Audience** tab.
20. In the Split Audience tab, filtered audiences can, optionally, be split into smaller, separate audiences. If desired, create splits for the filtered audiences on the promotion.
    - Click **Split**.

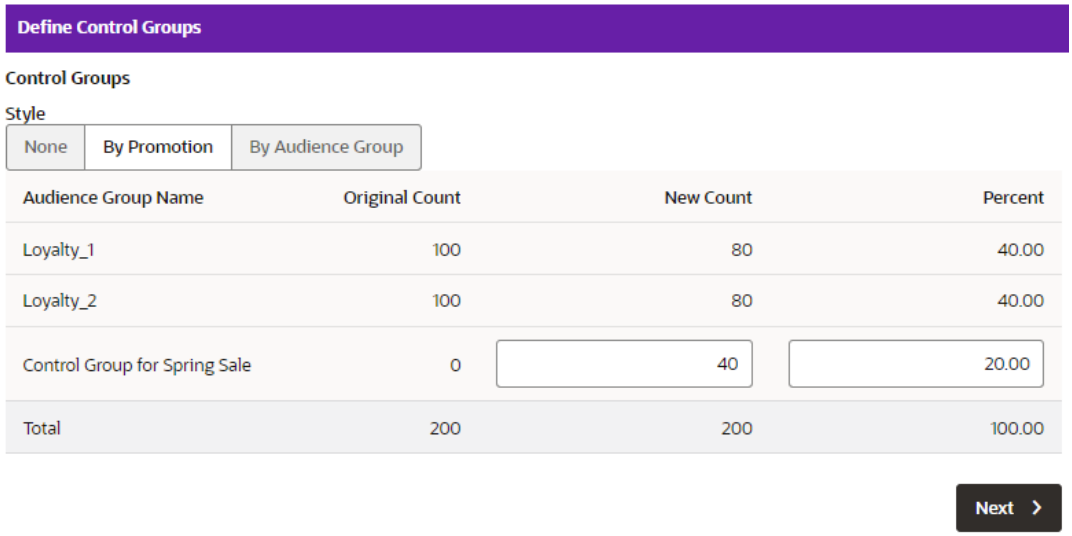
    Figure 6-202 Split Audience Groups

    - The Split Name field is automatically populated from the name of the Audience Group Name. If desired, you can change the name of the splits in this step.
    - Select **Split** to automatically divide the Audience Group into equal portions and percentages. If you desire different portions or percentages for the splits, enter either a count or a percentage, and the corresponding field will update.
21. When finished entering any Audience Group splits for the Promotion, click **Next** to continue to the **Control Groups** tab.

22. Enter the following information for the **Control Groups** tab.

Figure 6-203 Define Control Groups

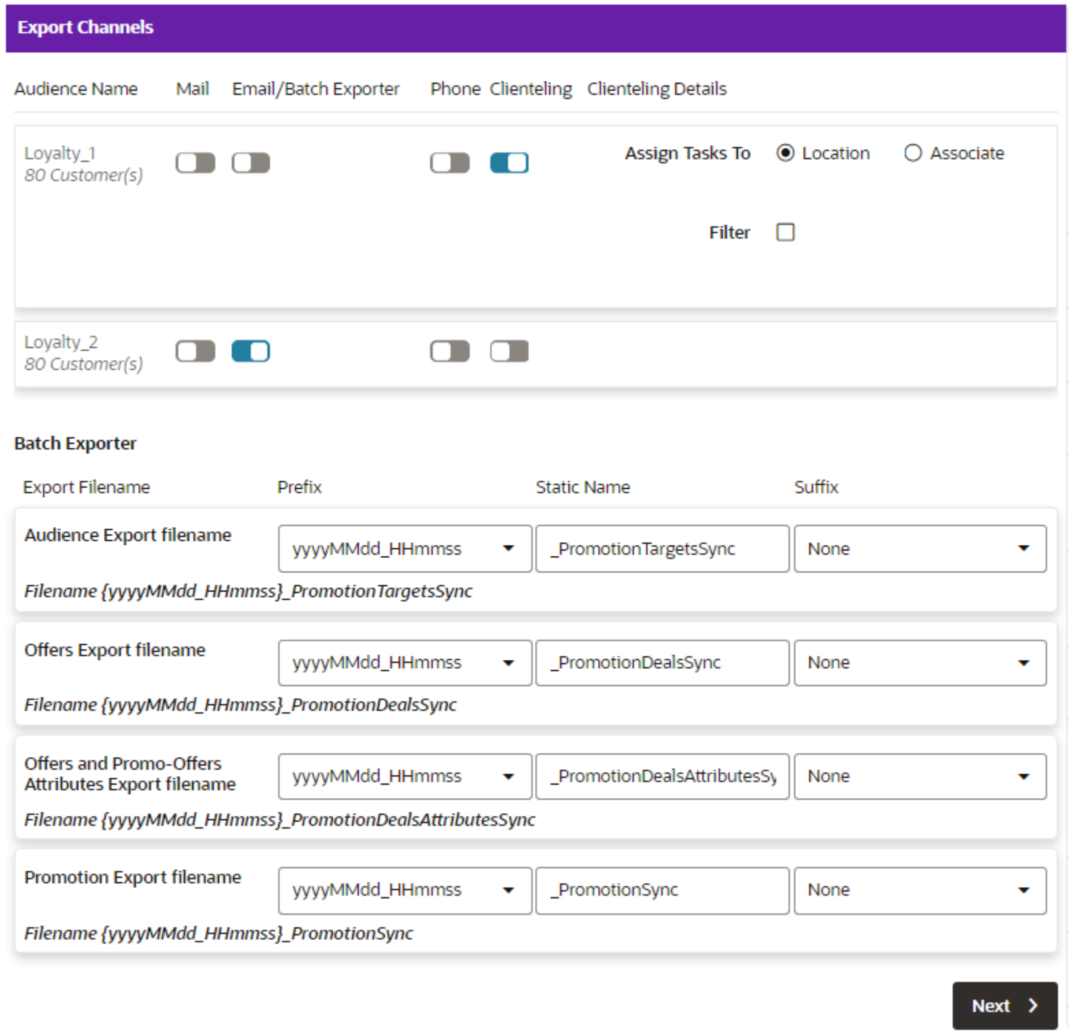


The control group is a statistically identical group that doesn't receive the offer. Following the promotional period, the results of the two groups are compared and you can determine if the offer generated incremental revenue. Options include:

- **None** – No Control Group
- **By Promotion** – Enter either a New Count or Percent. The corresponding field will update automatically to determine the size of the control group.
- **By Audience Group** – Enter either a Control Group count or percentage for each split created earlier. The corresponding field will update automatically.

23. When finished entering any Control Groups for the Promotion, click **Next** to continue to the **Export Channels** tab.
24. Enter the following information for the **Export Channels** tab. The options include:

Figure 6-204 Export Channels Tab



Mail - Determines whether the Customers in the Split/Control Group will be contacted by Mail.

EMail / Batch Exporter - Determines whether the Customers in the Split/Control Group will be contacted by Email.

> **Note:**
>
> The system configuration setting *SupportedBatchExporters* determines if the Batch Exporter section is displayed.

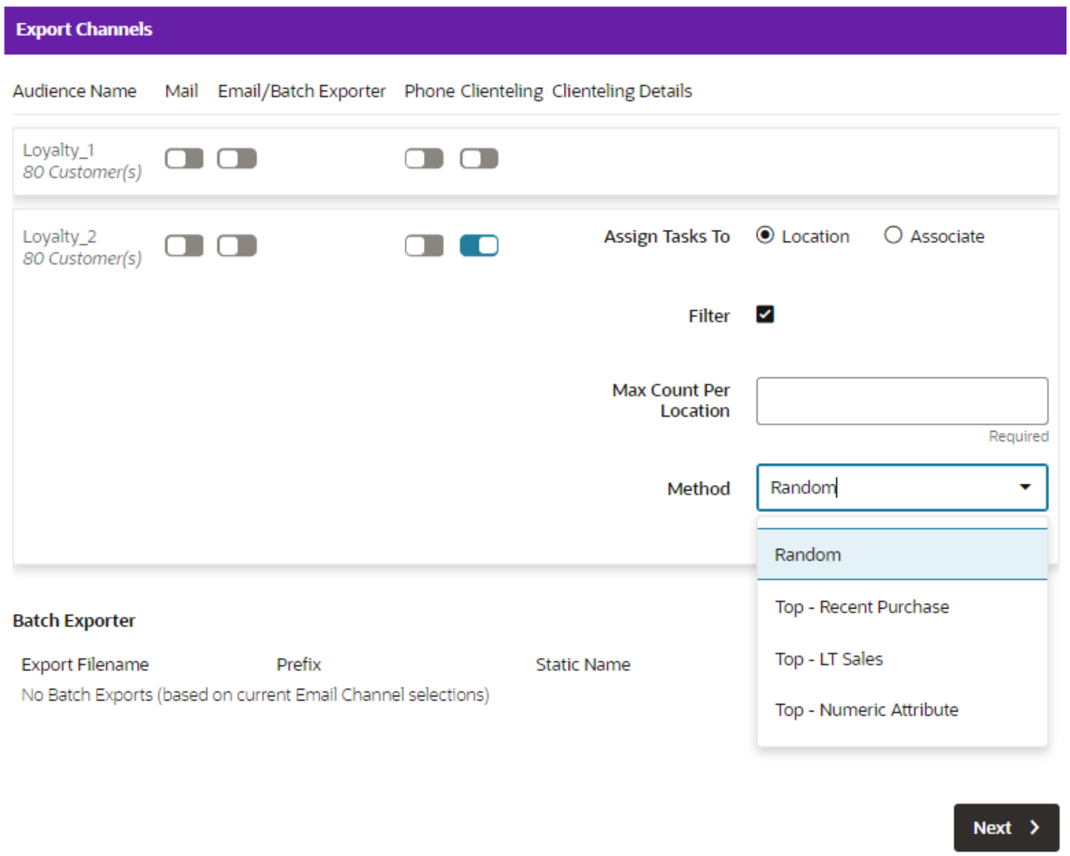
- Export Filename – Name of the file.
- Prefix – Indicates the format of the datetime stamp used as a prefix the filename. Optional. Possible settings are yyyyMMdd_HHmmss, yyyy-MMdd_HHmmss, or none.
- Static Name – The identifying filename.

- Suffix – Indicates the format of the datetime stamp used as a suffix the filename. Optional. Possible settings are yyyyMMdd_HHmmss, yyyy-MMdd_HHmmss, or none.
- Filename – Displays an example of the export file name with the prefix and suffix format, if any.

Phone - Determines whether the Customers are contacted by phone.

Clienteling – When the Clienteling switch is turned on, tasks will be created based on the assigned associates or locations for the defined target audience when the promotion is generated.

Figure 6-205 Clienteling Details



Assign Tasks to:

- **Location Channel** – Tasks are assigned to a Location.
- **Associate Channel** – Tasks are assigned to an associate in a location.

The following fields are enabled if the Filter option is selected:

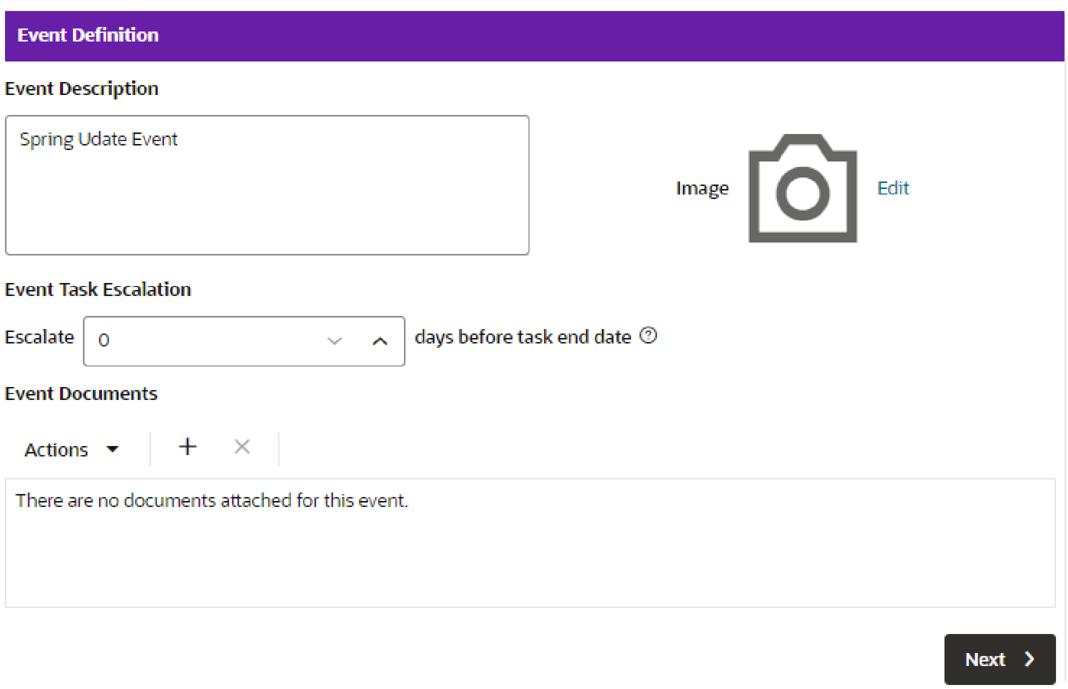
- **Max Count Per <type>** - Determines the maximum number of target Customers that will be contacted through the channel.
- **Method** - Method used to select the Customers contacted. Options include:
  - **Random** - Select Customers Randomly (Default).
  - **Top - Recent Purchase** - Filter the Customers based on the most recent purchases.

- **Top - LT Sales** - Filter the Customers based on the largest amount purchased over the lifetime of their account.
- **Top - Numeric Attribute** - Filter the Customers based on the highest attribute value for a selected numeric attribute. If this option is selected, an additional Channel Filter option, Attribute, displays. Attribute is the numeric attribute used to determine the customers contacted

25. When finished entering any Export Channels for the Promotion, click **Next** to continue to the **Event Definition** tab.
    - If Clienteling is not enabled, proceed to **Step 28**, the Budget Tab.
    - If Clienteling is enabled, proceed to **26**, the Event Definition tab.
26. Enter the following information on the Event Definition tab.

> **Note:**
>
> The Event Definition Tab displays only when the Promotion uses the Clienteling Channel.

Figure 6-206 Event Definitions Tab



Enter a **description** of the Event in the Event Description field (required).

Select the **Edit** option to add an image to the Event.

a. Perform one of the following actions:

   Click **Drop a new image here or click to upload** to add the image and continue to Step XX.

   Enter a **URL** in **Or Via URL** and click **Upload** and continue to Step XX.

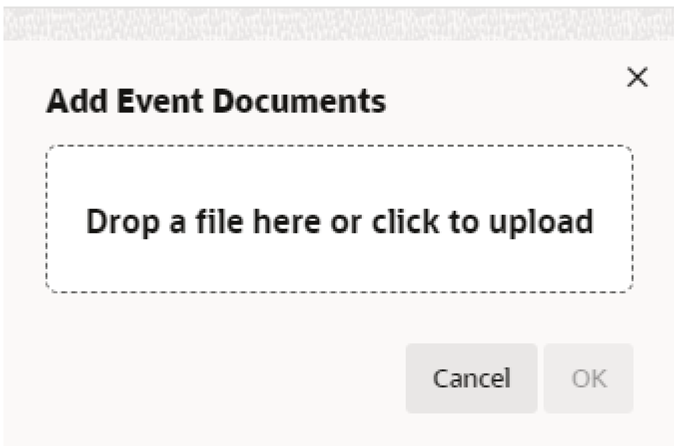
Click **Remove Image** to remove the image and continue to Step XX.

b. Click **Done** to save the changes and close the window, or click **Cancel** to close the window without saving any changes.

Event Task Escalation – This option will flag an Event Task for the promotion as high priority on the Day Planner Task panel based on the number days before the end date of the promotion event task.

Event Documents – Click the Action Menu, and click Add, or click the Add icon (+) to open the Add Event Documents window.

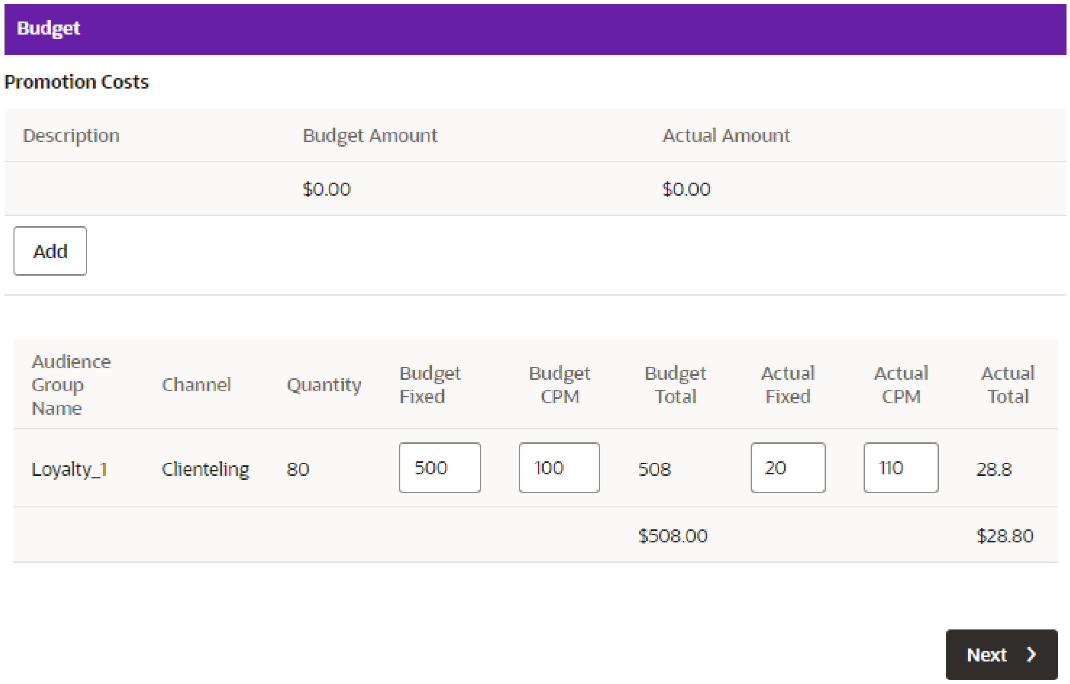
Figure 6-207 Add Event Documents



- Use the **Drop a file here or click to upload area** to add an event document.
- Click **OK** to save the changes and close the window, or click **Cancel** to close the window without saving any changes.

27. When finished entering any Export Channels for the Promotion, click **Next** to continue to the **Budget** tab.
28. Enter the following information on the **Budget** tab.

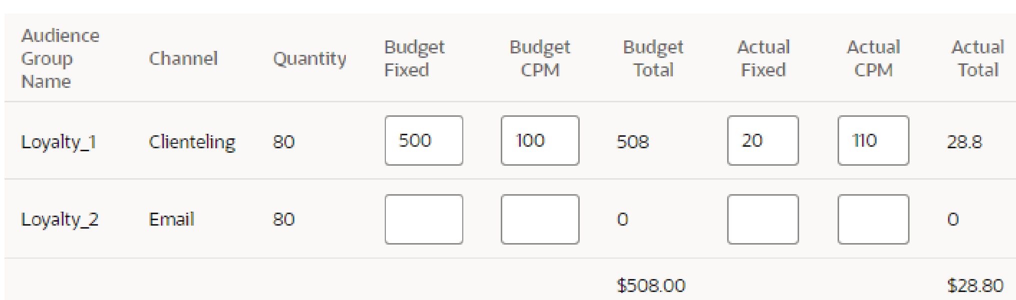
Figure 6-208 Budget Tab



a. Click **Add** to enter the Promotion Costs. Enter values in any field is optional.
b. Enter a **Description** of the cost item.
c. Enter the **budgeted amount** for the Promotion in the Budget Amount field.
d. Enter the **actual amount** for the Promotion in the Actual Amount field.
e. Click **Add** if you wish to enter another budget line for the promotion, then follow **steps a-d** to complete the fields.

   If Export Channels were selected for the audience group, the Audience Groups Costs section appears. Entering values in any field is optional.

   Figure 6-209 Audience Group Costs

f. In the Budget-Fixed field, enter the **fixed cost budgeted** for the audience.
g. In the Budget-CPM field, enter the **cost budgeted** for the Channel for each 1,000 Customers.
h. In the Actual-Fixed field, enter the **actual fixed cost** of the Channel.

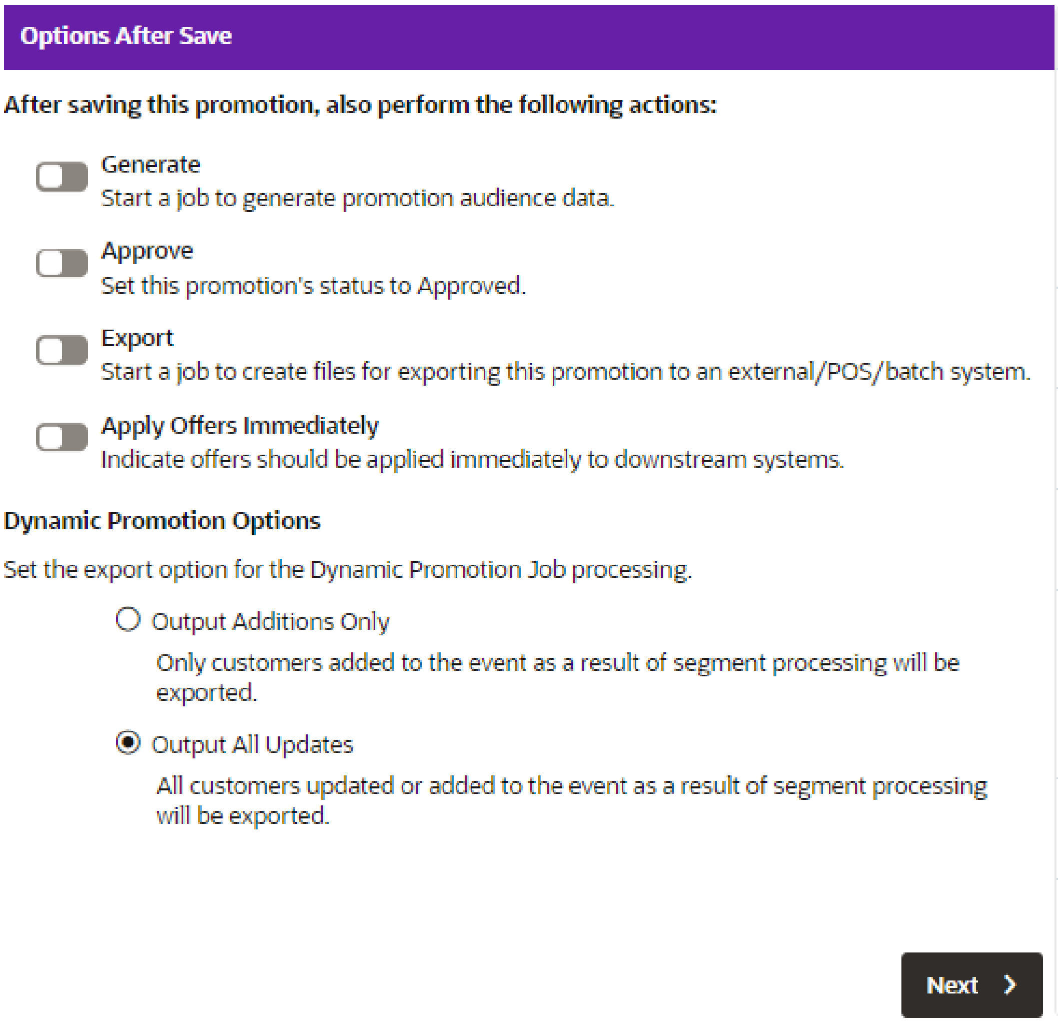
i. In the Actual-CPM field, enter the **actual cost** of the Channel for each 1,000 Customers.

j. Repeat **steps f-i** for each Target Channel in the Promotion.

29. When finished entering any Budget Costs for the Promotion, click **Next** to continue to the **Save Options** tab.

30. Enter the following information in the **Save Options** tab. You can enter more than one choice.

Figure 6-210 Options After Save Tab

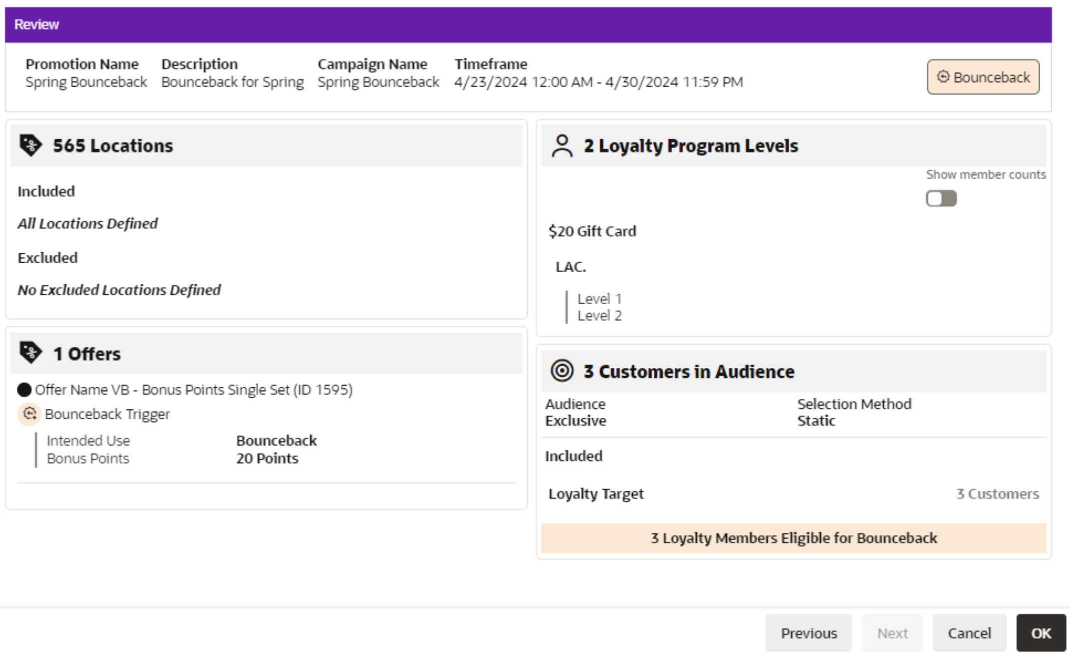


- Generate – Start a job to generate promotion audience data.
- Approve – Set this promotion's status to Approved.
- Dynamic Promotion Options – Select one of the two export options for processing when using the Dynamic selection method on the Audience tab.

> **Note:**
>
> Depending on the type of promotion that you created, different Options After Save are available.

31. When finished entering any Save Options for the Promotion, click **Next**.
32. The **Review** tab displays the key elements in the Promotion Setup.

Figure 6-211 Review Tab – Bounceback



33. Click **OK** to save the Promotion, or click **Cancel** to close the promotion without saving. Click **Previous** or any **Tab** to return to any point of the Create Promotion process.

Promotion Actions

From within the Promotion Home and Promotion Advanced Search windows, there are different Overflow Menus that enable you to perform some of following actions:

- **Approve** – Approves the promotion the user is viewing.
- **Duplicate** – Opens a new window enabling the promotion wizard for a copy of the existing promotion.
- **Edit** – Opens a new window enabling the promotion for editing.
- **Export Promotion Definition** – The definition of the Promotion is exported in a job, and associated export files are then attached to the Export Promotion in the Process Queue page.

> **Note:**
>
> This option is not available for an Award Promotion.

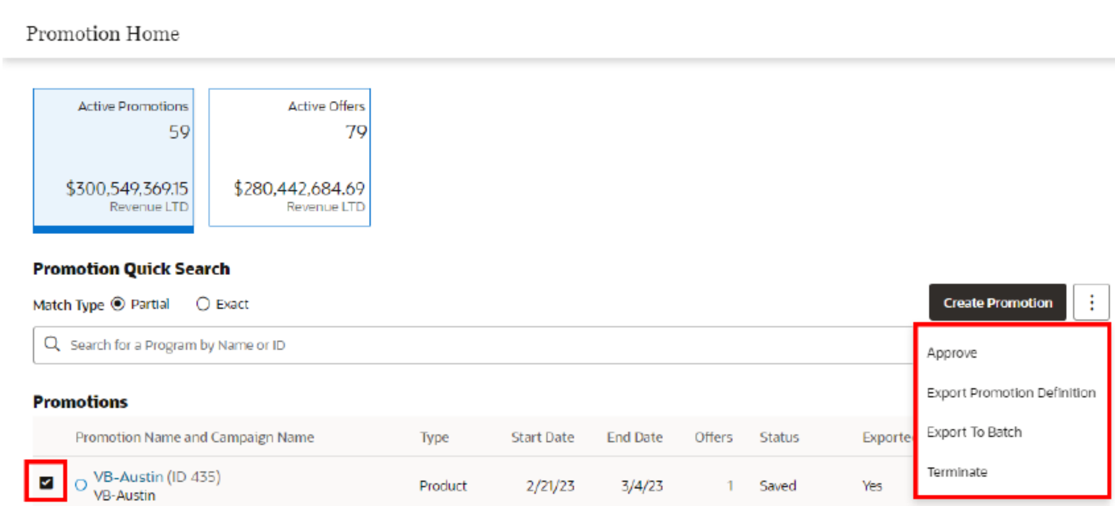
- **Export to Batch** – This option exports details about the Promotion, in a job, including the Offers, Attributes, Audience, and Serialized Coupons, if applicable. The files are listed in the Process Queue page under the Promotion Batch Export job for this Promotion.

> **Note:**
>
> This option is available only if one or more types are selected for the Supported Batch Exporter Types property in System Configuration.

- **Generate** – Creates generate job that can be accessed via the Job Process Queue.
- **Terminate** – This action will terminate the Promotion on the current date as well as disable the associated Offers on the Promotion.
- **View** – Opens a new window, displaying the Review tab for the Promotion.

> **Note:**
>
> The options will vary based on the promotion type and the user permissions.

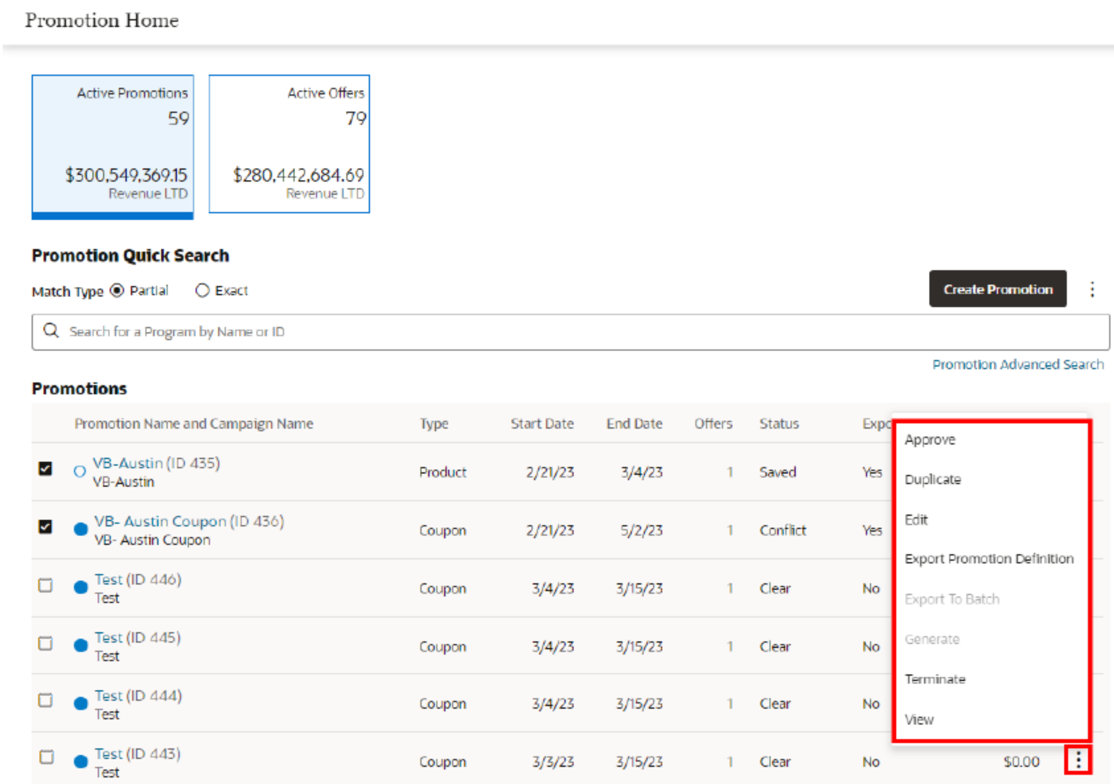
Figure 6-212 Promotion Home Overflow Menu Options: One or More Promotions



From within the Promotion Quick Search window and the Promotion Advance Search window, you can check one or many of the individual promotions using the check box to the left of the Promotion row. Then you can click the Overflow Menu to perform the following actions against the promotions:

- Approve
- Export Promotion
- Export to Batch
- Terminate

Figure 6-213 Promotion Home Quick Search Overflow Menu Options: Single Promotion



From within the Promotion Quick Search window and the Promotion Advance Search window, you can click the Overflow Menu to the right of the individual promotion, and perform the following actions:

- Approve
- Duplicate
- Edit
- Export Promotion Definition
- Export to Batch
- Generate
- Terminate
- View

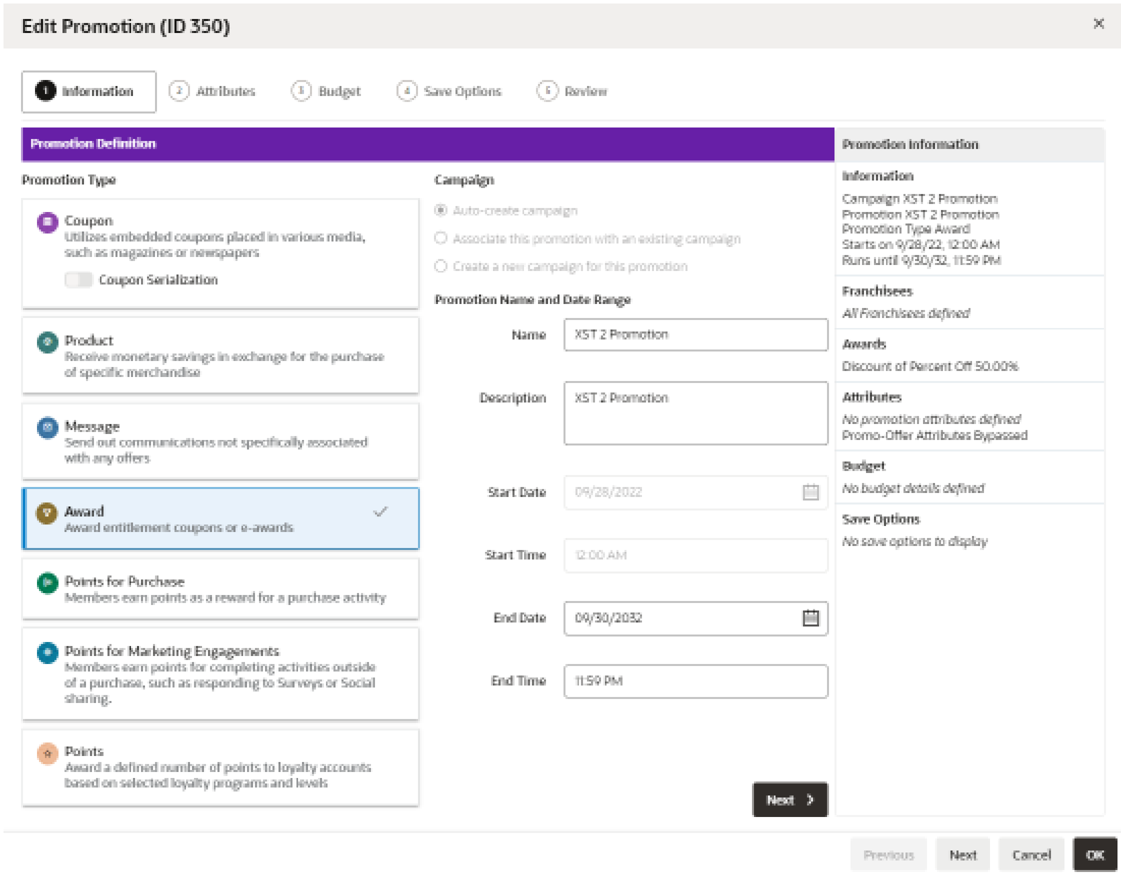
Editing a Promotion

There are three places that a user can find the Edit option in order to edit a Promotion:

- Select **Edit** under the Action Menu (also known as the Overflow Menu) icon for each individual Promotion on the Promotion Advanced Search window.
- Select **Edit** in the Overflow Menu on each individual Promotion on the Promotion List window (which displays in the Promotion Home menu).

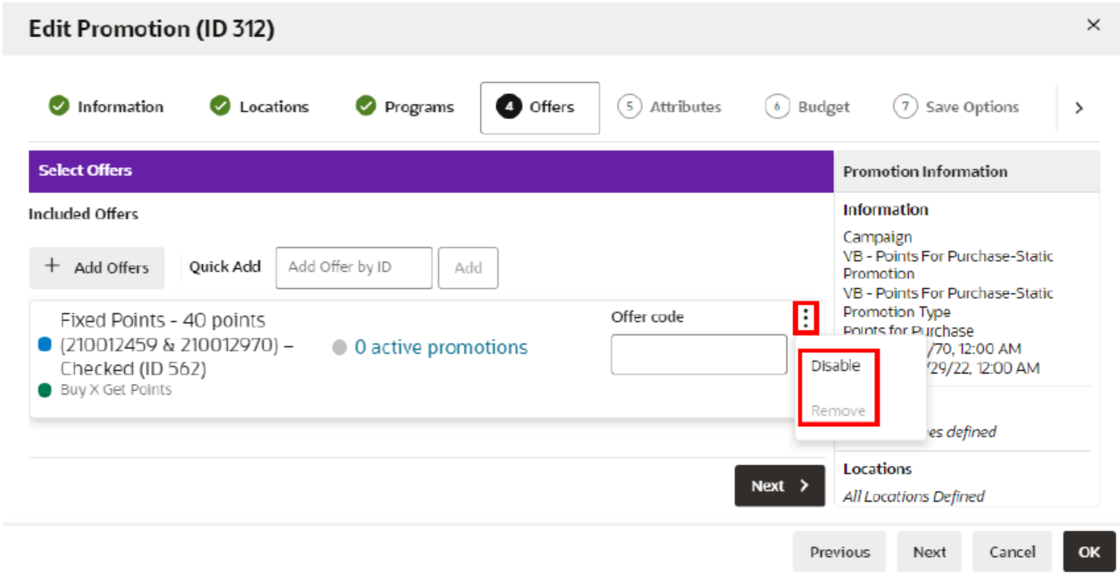
- Select **Edit** in the Overflow Menu for the individual Promotion on the Promotion Scorecard.

Figure 6-214 Edit Promotion



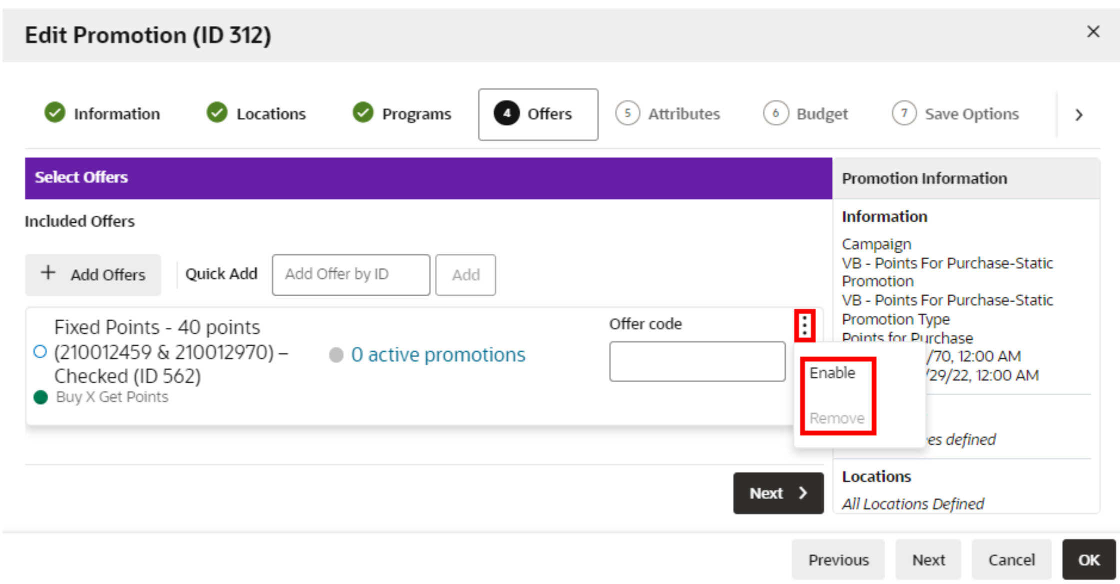
During the editing process an offer can be disabled by clicking the **Overflow Menu** and selecting **Disable**. Disabled offers have a Circle rather than a Dot next to the Offer Name.

Figure 6-215 Disable an Offer



Disabled offers can be enabled by clicking the **Overflow Menu** and selecting **Enable**. Enabled offers have a Dot rather than a Circle next to the Offer Name.

Figure 6-216 Enable an Offer



To edit other areas of the promotion, see Creating a Coupon Promotion for detailed information.

Editing a Promotion - Loyalty Bounceback

The Loyalty Bounceback that is available from the Information tab, the Programs tab, and the Offers tab are editable to allow you to modify the programs selected and the bounceback defined after the Coupon/Product promotion is created.

The ability to edit the promotion depends on whether or not the promotion has been generated.

See the following tab options when editing a Coupon/ Product promotion that includes a Loyalty Bounceback:

Information Tab

- You can change the Bounceback Type if the promotion has not been generated. All other fields can also be edited, with the exception of Campaign.
- When the Bounceback Type is changed, anything assigned to the offer on the Offers tab, is dropped.

> **Note:**
>
> A warning appears. Click **OK** to remove all loyalty bounceback details, or click **Cancel** to close the window without saving.

- You only have the ability to change the Name, Description and End Date fields after the promotion has been generated.

Programs Tab

- Existing program selections are set to default and are enabled when editing the promotion if the promotion has not been generated.
- When the promotion is generated, no changes to the Programs tab will be permitted.

Offers Tab

- All the fields included on the Offer tab are enabled when editing the promotion, if the promotion has not been generated.
- Existing offers cannot be removed after the promotion has been generated. However, they can be disabled. Additionally, a previously disabled offer can be re-enabled.

Duplicating a Promotion

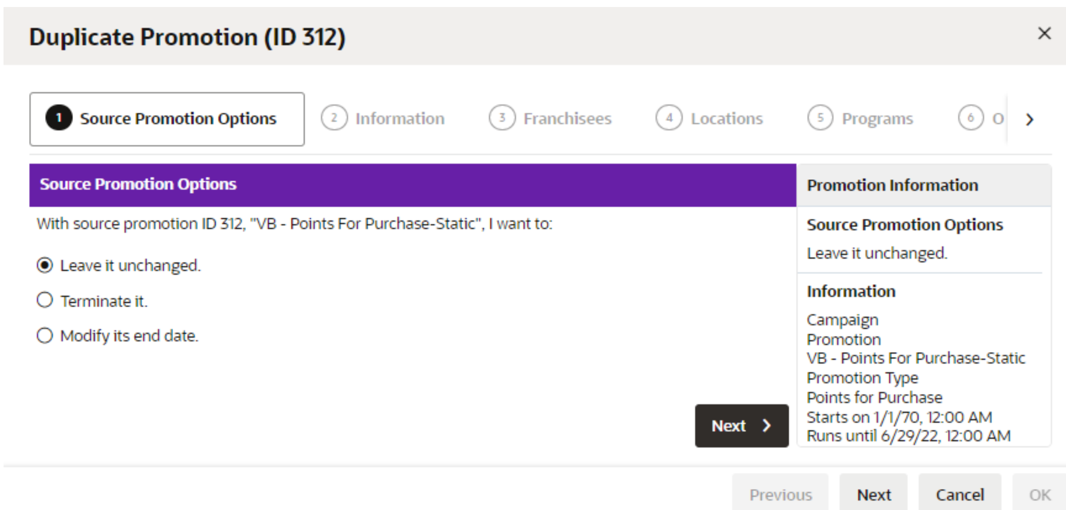
To create a new Promotion with the same configurations as the current Promotion:

> **Note:**
>
> Some information will not be copied from the existing
>
> Promotion to the new Promotion:
>
> - Auto-created Campaigns
> - End Dates in the past
> - Coupon configurations
> - Target information
> - Options after saving

1. There are three places that a user can find the Duplicate option in order to duplicate a Promotion:
   - Select **Duplicate** under the **Action Menu** (also known as the Overflow Menu) icon for each individual Promotion on the Promotion Advanced Search window.
   - Select **Duplicate** in the **Overflow Menu** on each individual Promotion on the Promotion List window (which displays in the Promotion Home menu).
   - Select **Duplicate** in the **Overflow Menu** for the individual Promotion on the Promotion Scorecard.

   A copy of Promotion opens in the Promotion Wizard, prompting for the action to perform on the current Promotion.

   Figure 6-217 Source Promotion Options



2. Select the action to perform on the existing Promotion:
   - Leave it unchanged. – Do nothing to change the existing Promotion.
   - Terminate and export it – Terminate the Promotion and export the termination to the POS systems.
   - Modify its end date and export it – Change the end date for the Promotion and export the Promotion, with its new end date, to the POS systems.

   > **Note:**
   >
   > If you select this option, Customer Engagement prompts for the new End Date and End Time.

3. Click **Next**.
4. **Edit** the Promotion.
   - Use Wizard Navigation to move through the Wizard.
   - Make any necessary changes.
   - Click **Save** when you are finished making changes. The Wizard closes, saving the new Promotion and returning to the Promotion List.

- Click **Cancel** to exit the Wizard and return to the Promotion List without saving the new Promotion.

For more information about the fields and information to be entered, see Creating a Coupon Promotion.

Promotion Scorecard

The Promotion Scorecard displays information about the Customer response to a Promotion.

Viewing the Promotion Scorecard

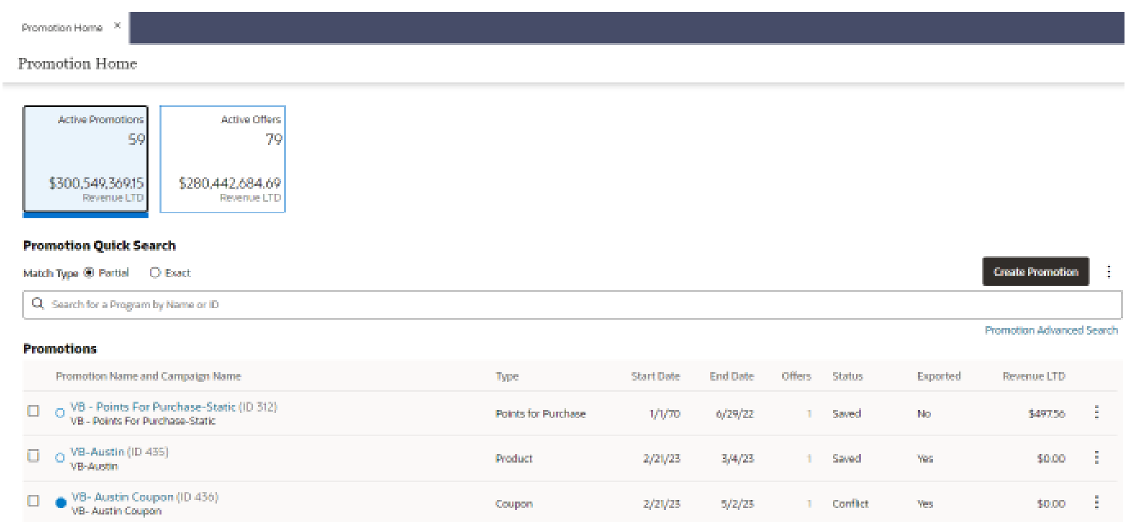
To access the Promotion Scorecard for summary information on a particular promotion, the user can select the link on the Promotion name on either the Promotion List or the Promotion Search results windows.

To access the Promotion List:

1. From the **Main** menu, click **Tasks**.
2. Click **Campaign**.
3. Click **Promotion Home**. This should default you to the Promotion List

> **Note:**
>
> You will need the Promotion Home role in order to see this menu option.

Figure 6-218 Promotion Home

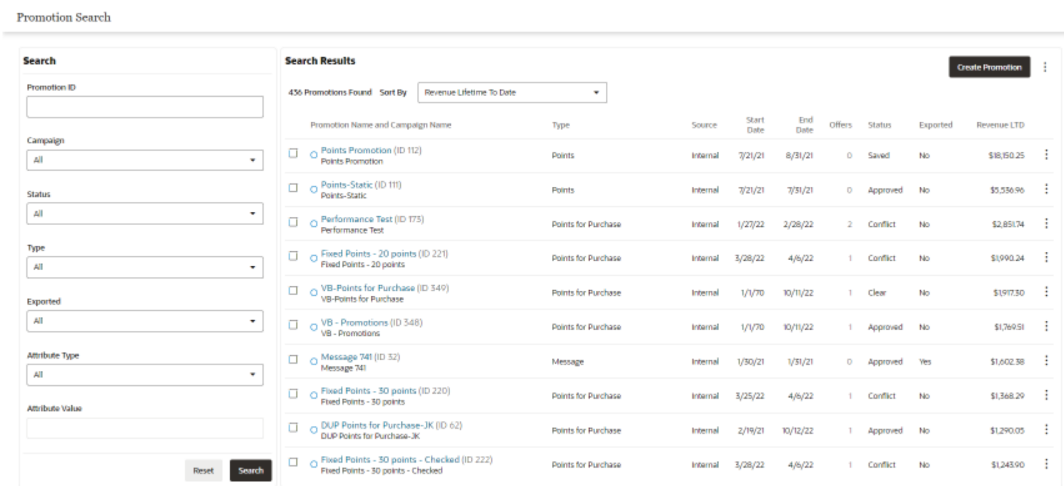


To access the Promotion Search results window:

1. From the **Main** menu, click **Tasks**.
2. Click **Campaign**.

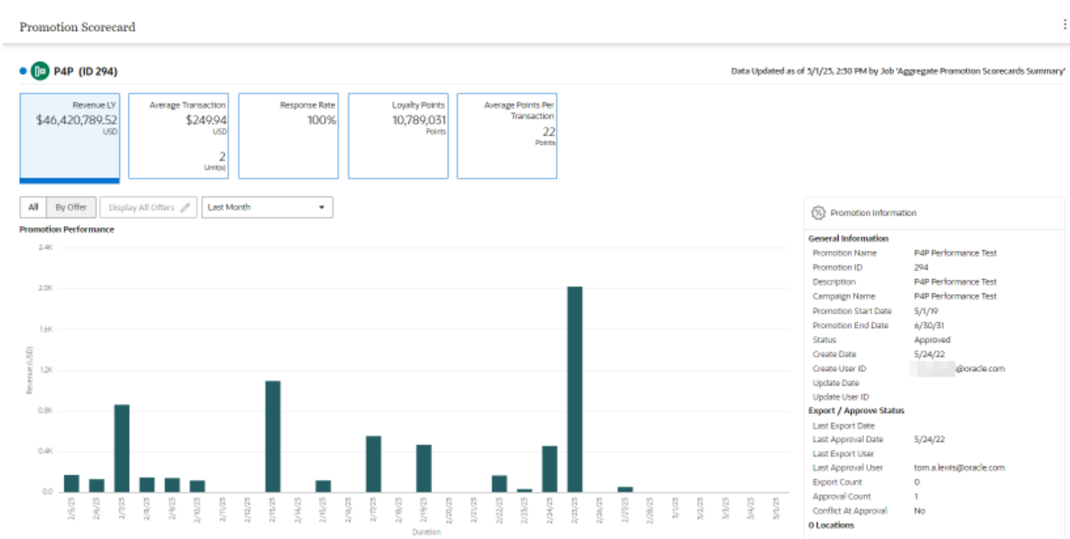
3. Click **Promotion Search**.
4. Enter **criteria** in the Search panel where you can search for a unique promotion, or click **Search** to retrieve all promotions.

Figure 6-219   Promotion Search



5. Select the **link** on a **Promotion Name**, which then opens the Promotion Scorecard for that promotion.
6. Click the **Revenue LY Metric Tile** to see the following information:

Figure 6-220   Promotion Scorecard - Revenue LY Metric Tile View



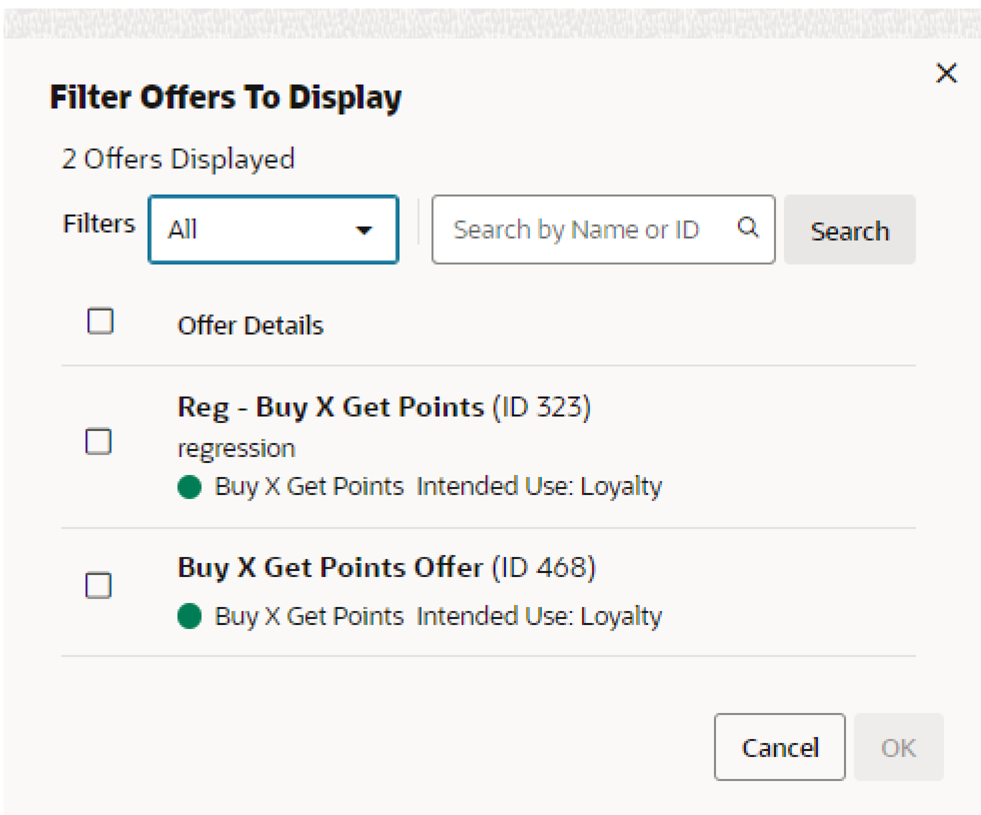
The Promotion Scorecard window displays the following sections:

- Title section (displays on all windows) – this contains the name and ID of the Promotion as well as an indicator of whether the promotion is currently active or inactive (a solid Blue Dot represents an Active Promotion while an Empty Dot represents an Inactive Promotion).

- Metric Tiles (displays on all windows) – The following metric tiles are included for the Promotion Scorecard:
  - Revenue LY
  - Average Transaction
  - Response Rate
  - Loyalty Points (Loyalty Only)
  - Average Points Per Transaction (Loyalty Only)
- Filter/Sort Options

  Filtering and sorting options for the Promotion Performance graph (displays only for the Revenue LY and Loyalty Points Metric tiles) - The following filter choices allow you to change the display in the Promotion Performance graph, and they include:
  - All – Displays total for All offers combined.
  - By Offer – Displays totals by individual offer.
  - Display all Offers – Filter the offers you wish to display in the Promotion Performance graph. This button is only available when By Offer is activated.

Figure 6-221 Filter Offers to Display



The Filters menu options on the Filter Offers to Display popup window will include the type of Offers that exist on the Promotion you are viewing.

- In the Filter Offers to Display popup window, you can also search by **Name** or **ID** and click **Search** to retrieve the list of offers on this promotion.

- From the list of filtered offers, select the **check box** for each offer you wish to display on the Promotion Performance graph.
- Click **OK** to display the offers in the graph, or click **Cancel** to return to the Scorecard without saving any filters.

Duration

- Last Week
- Last Month (Default)
- Last 6 Months
- Last Year
- Lifetime to Date – Offer performance for last five years

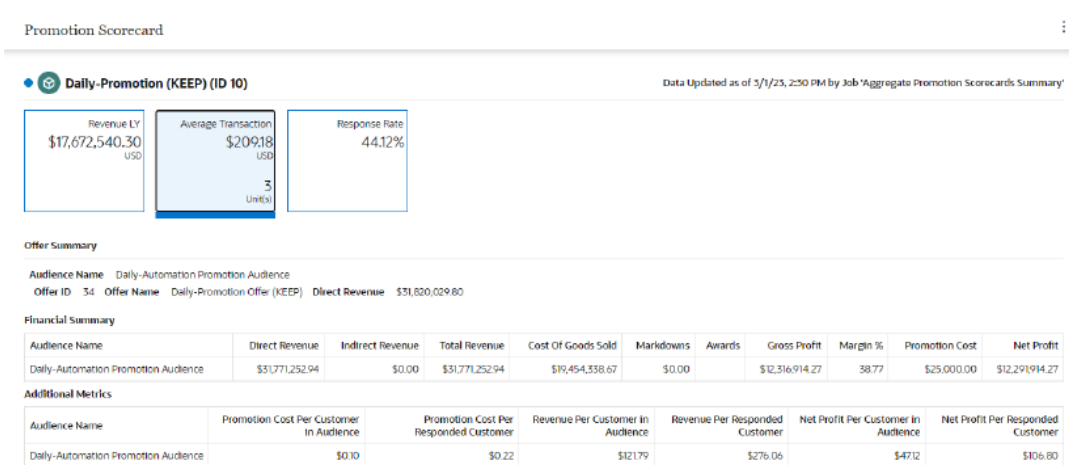
The Promotion Performance graph (displays only on the Revenue LY Metric tile) includes the following fields:

- Revenue
- Duration

The Promotion Information panel (displays only for the Revenue LY, Loyalty Points, and Average Points Per Transaction Metric tiles) See Promotion Information - Scorecards for more information.

7. Click the **Average Transaction Metric Tile** to see the following information:

Figure 6-222 Promotion Scorecard - Average Transaction Metric Tile Summary for a Product Promotion



Offer Summary – data displayed will depend on whether the promotion is a Product or Coupon Promotion. Award and Message type Promotions will not display an Offer Summary section.

- Audience Name
- Offer ID
- Offer Name
- Direct Revenue

Financial Summary

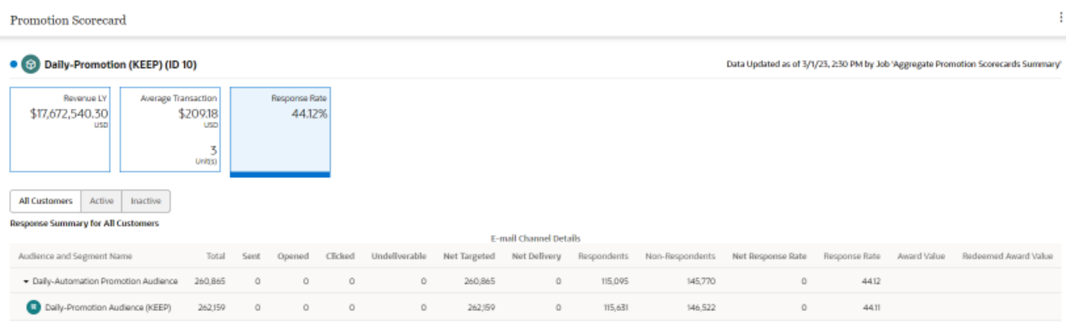
- Audience Name
- Direct Revenue (Apply to Coupon Promotions Only)
  - Coupon Code
  - Respondents
  - Transactions
  - Value Of Discount
  - Average Sales By Coupon
  - Coupon Revenue
  - Estimated Distribution
  - Response %
- Indirect Revenue
- Total Revenue
- Cost of Goods Sold
- Markdowns
- Awards
- Gross Profit
- Margin %
- Promotion Cost
- Net Profit

Additional Metrics

- **Audience Name** – Name of the group of customers targeted for the Promotion.
- **Promotion Cost Per Customer in Audience** – Cost of the Promotion per Customer targeted by the Promotion.
- **Promotion Cost Per Responded Customer** – Cost of the Promotion per Customer who responded to the Promotion.
- **Revenue Per Customer in Audience** – Revenue received from the Customers who were targeted for the Promotion.
- **Revenue Per Responded Customer** – Revenue received from the Customers who responded to the Promotion.
- **Net Profit Per Customer in Audience** – Net Profit from the Customers who were targeted for the Promotion.
- **Net Profit Per Responded Customer** – Net Profit from the Customers who responded to the Promotion.

8. Click the **Response Rate Metric Tile** to see the following information which can be viewed by All Customers, Active, or Inactive:

Figure 6-223 Promotion Scorecard - Response Rate Metric Tile

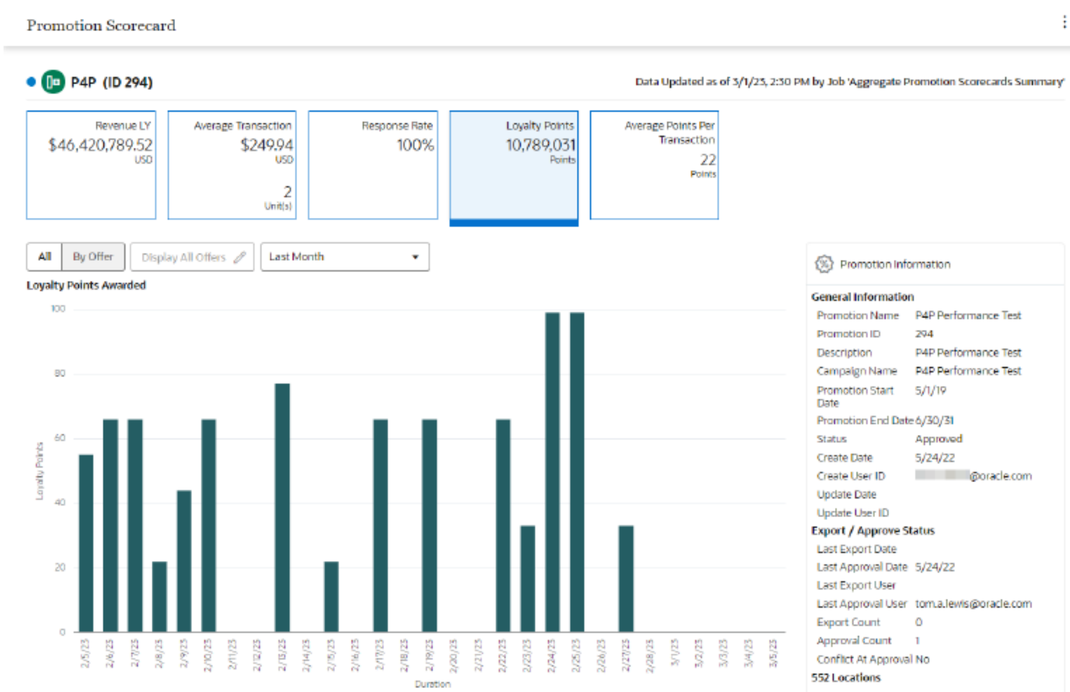


- **Audience and Segment Name** - Name of the target. A target name ending in _CTL indicates a control group. Non-Targeted is displayed as the Target Name for customers who responded to the Promotion but were not included in Target Groups.
- **Total** - Number of Customers to whom emails were sent because they were in the Target Group. For Non-Targeted totals, this is the number of non-targeted customers who responded.
- **Sent** - Number of emails sent. This total is 0 for Non-Targeted customers.
- **Opened** - Number of emails opened.
- **Clicked** - Number of emails clicked on.
- **Undeliverable** - Number of emails that could not be delivered.
- **Net Targeted** - Total customers - Undeliverable emails.
- **Net Delivery** - Total number of emails Sent - Undeliverable emails.
- **Respondents** - Number of Customers in the Target who have responded to the Promotion. This is the same as the Total for Non-Targeted customers.
- **Non-Respondents** - Number of Customers in the Target who have not responded to the Promotion. This is 0 for Non-Targeted customers.
- **Net Response Rate** - Calculated by dividing the total number of Respondents by the Net Delivery total. Set to 0.00 for Non-Targeted customers.
- **Response Rate** - Calculated by dividing the total number of Respondents by the Total number targeted. Set to 100.00 for Non-Targeted customers.
- **Award Value** - The total value of Awards issued through the promotion. Included only for an Award Promotion.
- **Redeemed Award Value** - The total value of Awards redeemed. Included only for an Award Promotion.

9. Click the **Loyalty Points Metric Tile** to see the following information which can be viewed by All Customers, Active, or Inactive:

> **Note:**
>
> For Points Promotions, the Loyalty Tile displays differently. See Figure 5-183 followed by the description for this type of promotion.

Figure 6-224 Loyalty Points Metric Tile

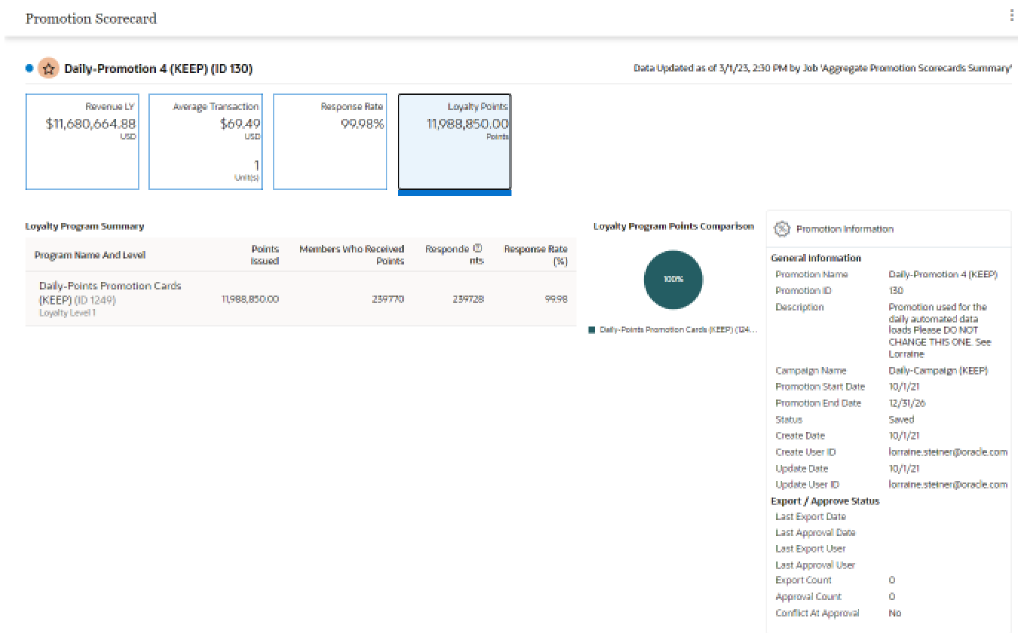


Graph

- The bar graph will dynamically update the Loyalty Points Awarded based on the Offers selected and Duration.
- By default the performance graph displays the offer details based on the time period selected for this promotion.
- The graph represents a plot between the Loyalty Points on Y-axis and Duration on X-axis for each individual Promotion.

> **Note:**
>
> See Filter/Sort Options for sorting and filtering options for the Loyalty Points Awarded graph.

Figure 6-225 Loyalty Points Metric Tile - Points Promotion Scorecard



> **Note:**
>
> This is a promotion type specific to the loyalty program and issues loyalty points to specific card loyalty programs. The purchase totals are based on the selected customers/loyalty members receiving the Points promotion. There are no offers (triggering events) that are required to receive the points. The total purchases are based strictly on the customers that are part of the promotion. There are no items to exclude as we would do in the case of a promotion with offers.

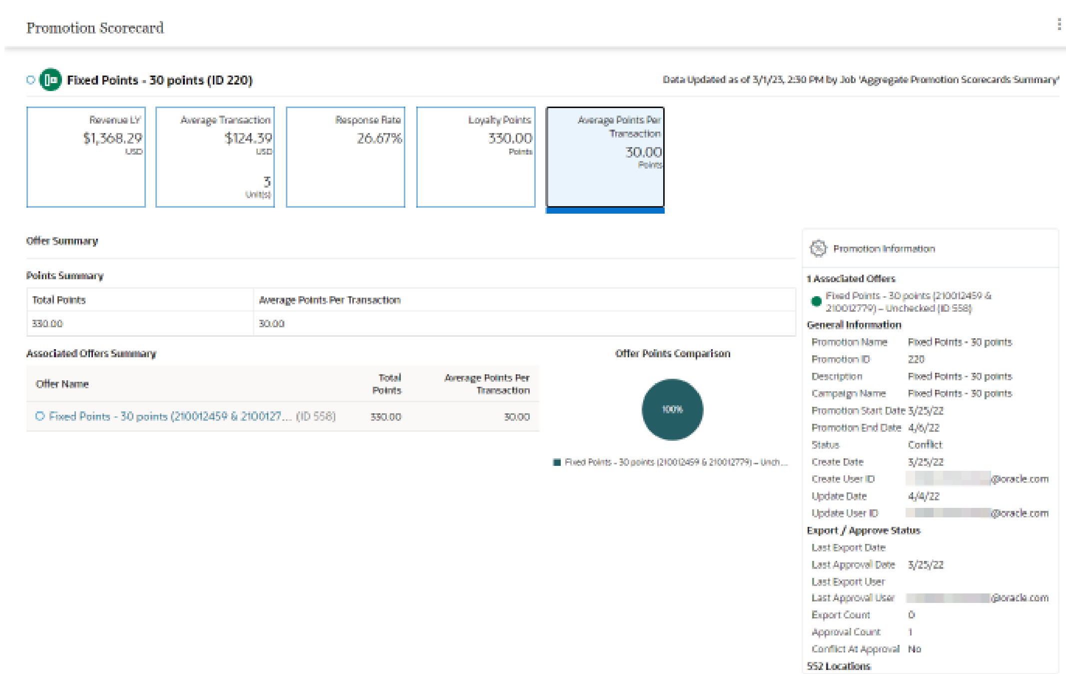
> **Note:**
>
> The values displayed in the scorecard will include only indirect revenue. The indirect revenue is based on all purchases made by the customers that received loyalty points. This scorecard is used to analyze the stimulation in revenue based on issuing loyalty points. However, these transactions cannot be tied directly to specific purchases.

- **Loyalty Program Summary**
  - Program Name and Level
  - ID
  - Points Issued
  - Members Who Received Points
  - Respondents - Members who received points that also made a purchase during this promotion period.

  - Response Rate {%}
- **Pie Chart**
  - Calculates and displays the Total Points Issued by program and level.
  - Each sector of the pie chart represents the points awarded to the unique program and level with a different color.
  - The table lists all the levels, but the pie chart will only show the top ten based on points issued.
- **Promotion Information**
  - General Information
  - Export / Approve Status

10. Click the **Average Points Per Transaction Metric Tile** to see the following information which can be viewed by All Customers, Active, or Inactive:

Figure 6-226 Average Points Per Transaction Metric Tile



Offer Summary - Points Summary

- **Total Points** – Sum Total of the Points generated using the offer.
- **Average Points Issued Per Transaction** – Average number of points issued per Transaction during the Promotion period to the members against their purchase activity. The Average Value (Total Points issued/Number of Transaction).

Associated Offers Summary

- A full circle represents an Active Offer or an empty circle represents an Inactive Offer.
- Offer Name

    - When a user selects the offer name from the list of offers on the Promotion Scorecard window, the system displays the View Offer window for the selected promotion on the same tab. See Viewing Offers for more information.
- Total Points - Total points distributed for the offer.
- Average Points Per Transaction - Average number of points issued per Transaction during the Promotion period to the members against their purchase activity. The Average Value (Total Points issued/Number of Transaction).

Offer Points Comparison

- The pie chart shows the pictorial representation of the points distributed from the respective offers.
- The title of the pie chart is Offer Points Comparison.
- The maximum of top ten offers by direct revenue display.
- Each sector of the pie chart represents the points distributed by an individual offer with a different color.
- A legend displays to the right of the pie chart and is linked with the information displayed in the pie chart.

> **Note:**
>
> To close the Promotion Scorecard, click the close icon **X** associated with the Promotion Number in the Open Tasks area at the top of the window.

Promotion Information - Scorecards

The Metric Tiles that display Promotion Information include:

- Revenue LY
- Loyalty Points
- Average Points Per Transaction

Figure 6-227 Promotion Information - General Information (All Tiles)

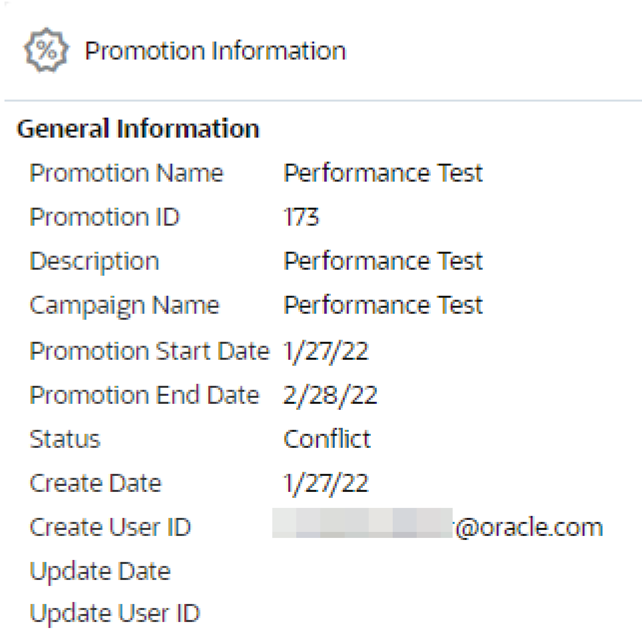
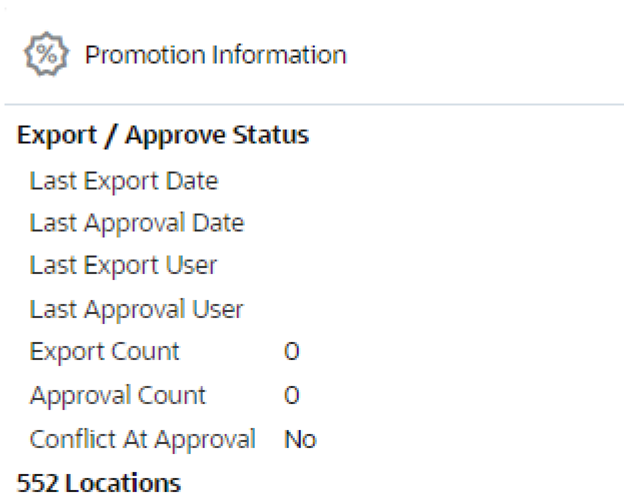
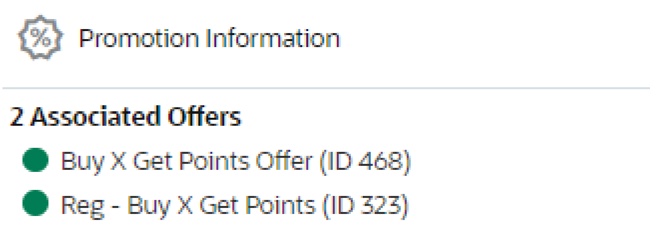


Figure 6-228 Promotion Information - Export/Approve Status and Locations (All Tiles)



> **Note:**
>
> Depending on the type of promotion that you created, different Export/Approve Status are available.

Figure 6-229 Promotion Information - Associated Offers (Average Points Per Transaction Tile Only)

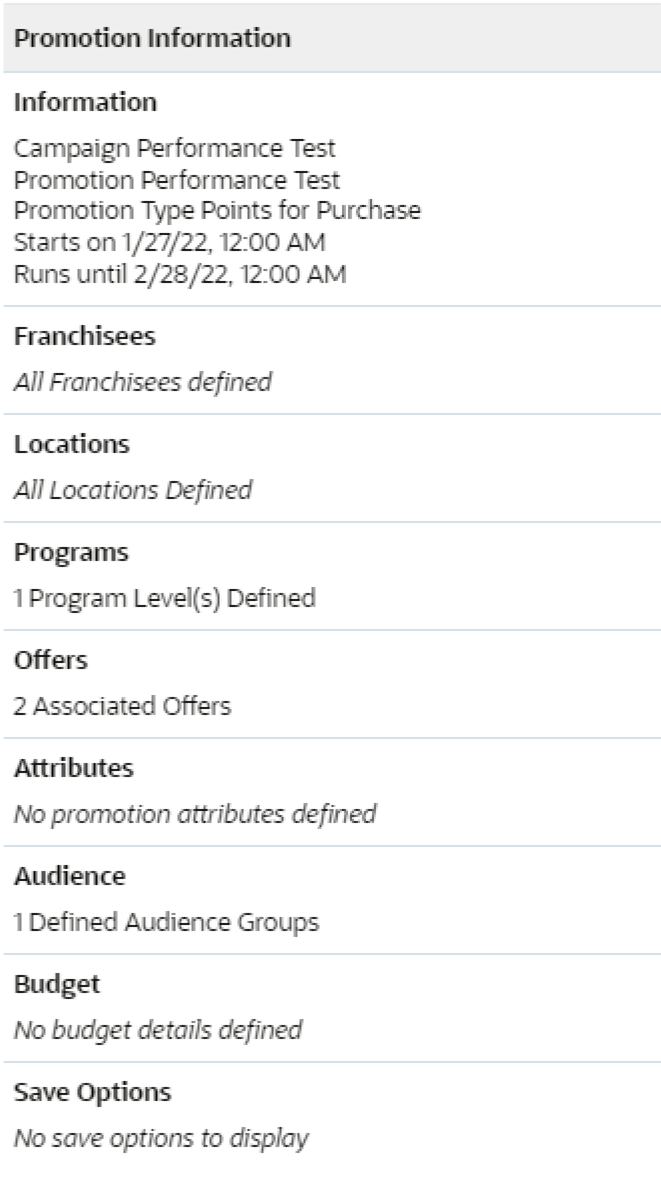


Promotion Information - Tabs

Many of the tabs also include the Promotion Information panel on the right side for each tab. This information summarizes what has previously been configured for the Promotion. The tabs that display Promotion Information include:

- Information
- Franchisees
- Awards
- Locations
- Offers
- Attributes
- Coupons
- Audience
- Event Definition
- Budget
- Save Options

Figure 6-230 Promotion Information Panel



7

Offers

In Customer Engagement, Offers are price incentives given to the customer. These offers can often be reused in separate Promotions or Card Programs. To facilitate and ease the reuse of existing Offers, a library of Offers can be created in Customer Engagement.

About this Chapter

This chapter contains the following information:

- Offer Types
- Intended Use
- Offers Quick Search
- Offers Advanced Search
- Creating Offers
- Editing Offers
- Duplicating Offers
- Viewing Offers
- Offer Scorecard

Offer Types

The Offer Type determines the type of incentive provided by the Offer. Customer

Engagement has the following Offer Types:

- **Transaction Discount** - A discount is prorated across all items within a transaction.
- **Line Item Discount** - A discount is applied to specific line items within a transaction.
- **Fixed Quantity/Price** - A fixed price is defined for various quantities of qualifying items.
- **Kit** - A defined set of heterogeneous items that, when purchased together, trigger special pricing.
- **Gift with Purchase** - A specific gift item is provided at a discounted price when the selected qualifying items are purchased.
- **Buy X Get X** - The purchase of defined items at regular price allows the customer to receive discounts on the purchase of subsequent quantities of the same items of equal or lesser value.
- **Buy X Get Y** - The purchase of defined items at regular price allows the customer to receive discounts on the purchase of subsequent different items at a discount.
- **Tiered Discount** - A discount is applied to a defined set of items and the amount of the discount can vary at different quantity thresholds.
- **Buy X Get Points** - The purchase of the qualifying items will result in the loyalty points being awarded to the loyalty program members.

- **Marketing Engagements** - Create a bonus point earning opportunity for an event that happens outside of Customer Engagement.
- **Bounceback Trigger** - Defines the qualifying items that will trigger loyalty points or an entitlement coupon to be issued during a Bounceback promotion period. This offer type can only be used with the Bounceback promotion type.

Intended Use

In Customer Engagement, Offers can be assigned an Intended Use. This indicates the manner in which an Offer is likely to be used.

- **Any (Default)** – An Offer that can be applied as a Product, Coupon, or Entitlement.
- **Coupon** – An Offer that is applied to an item or transaction through a Coupon.
- **Product** – An Offer that is applied directly to an item or transaction.
- **Entitlement** – An Offer that is applied to an item or transaction as an Entitlement for a Customer, including Offers associated with Promotions or Card Programs.
- **Loyalty** - An Offer that is applied to a transaction enabling the customer to earn loyalty points.
- **Bounceback -** An Offer that is applied to a transaction enabling the customer to earn loyalty points or entitlement coupon.

> **Note:**
>
> This is only displayed when the offer Type is Bounceback Trigger and this value cannot be changed to another value.

Offers Quick Search

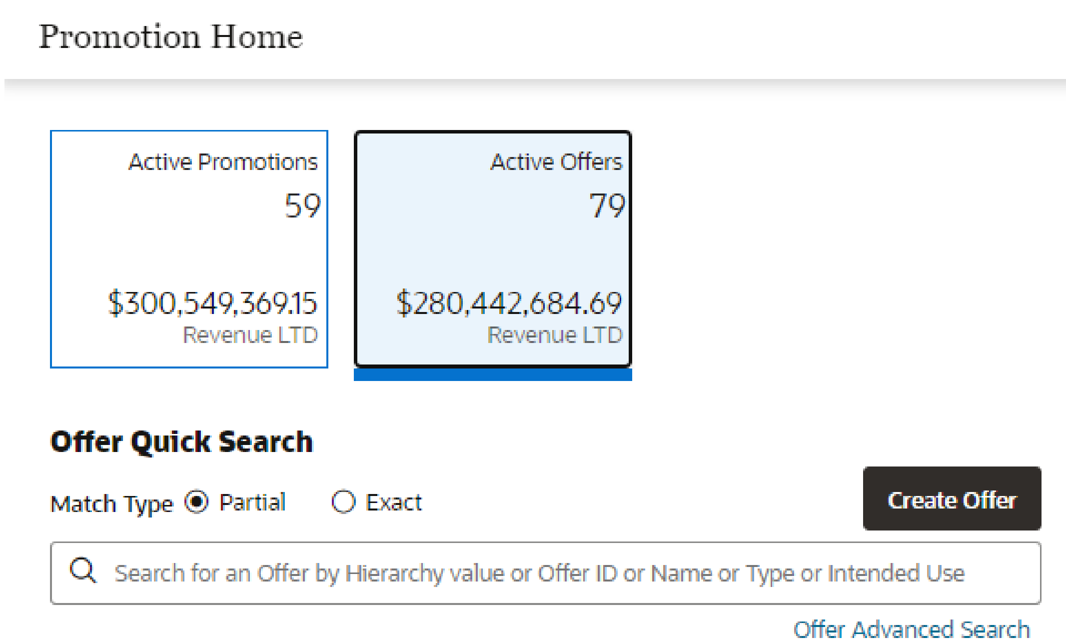
Offers Quick Search displays a list of results as you type in characters in the search box. To use the Offers Quick Search do the following:

1. Click **Tasks**.
2. Click **Campaign**.
3. Click **Promotion Home**.

> **Note:**
>
> You will need the Promotion Home role in order to see this menu option.

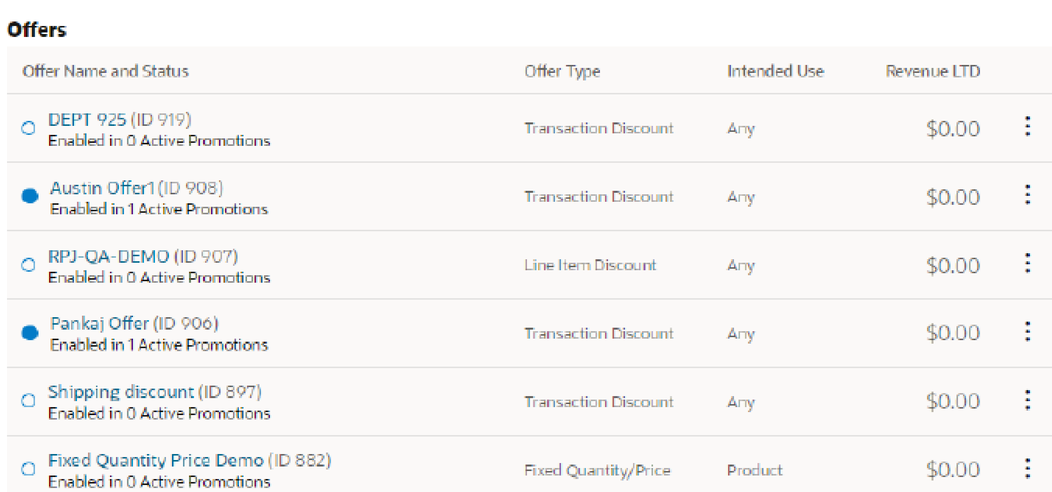
4. Click the **Active Offers** Metric Tile.

Figure 7-1 Promotion Home Active Offers Metric Tile



5. In the Search for Offers field, enter the Hierarchy Value, Offer ID, Name, Type, or intended use of the offer you want to search for. Click **Partial** to search for Offers that partially match the search text, or click **Exact**, to search for an exact match.

Figure 7-2 Offers

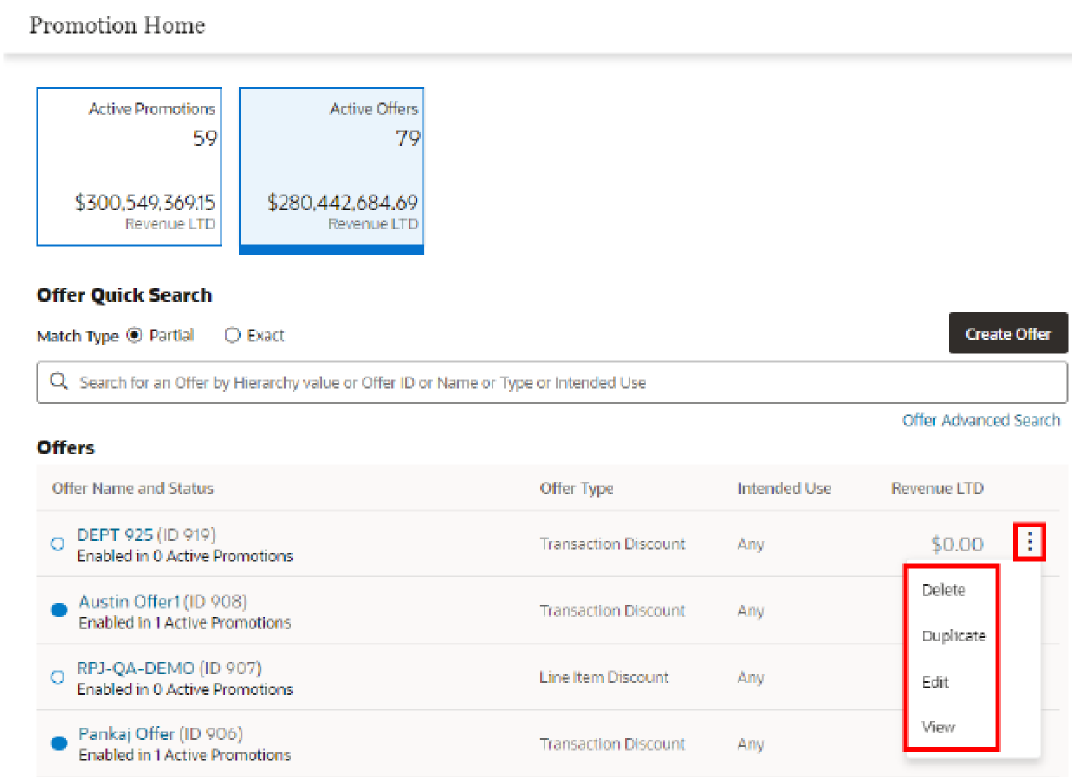


Offers

Offer Name and Status	Offer Type	Intended Use	Revenue LTD
DEPT 925 (ID 919) Enabled in 0 Active Promotions	Transaction Discount	Any	$0.00
Austin Offer1 (ID 908) Enabled in 1 Active Promotions	Transaction Discount	Any	$0.00
RPJ-QA-DEMO (ID 907) Enabled in 0 Active Promotions	Line Item Discount	Any	$0.00
Pankaj Offer (ID 906) Enabled in 1 Active Promotions	Transaction Discount	Any	$0.00
Shipping discount (ID 897) Enabled in 0 Active Promotions	Transaction Discount	Any	$0.00
Fixed Quantity Price Demo (ID 882) Enabled in 0 Active Promotions	Fixed Quantity/Price	Product	$0.00

6. Click the Name which appears as a link in blue for any Offer to open the Offer Scorecard for that offer. See Offer Scorecard for more information. Use the Overflow Menu to Delete, Duplicate, Edit, or View the offer. See Deleting Offers, Duplicating Offers, Editing Offers, or Viewing Offers for more information.

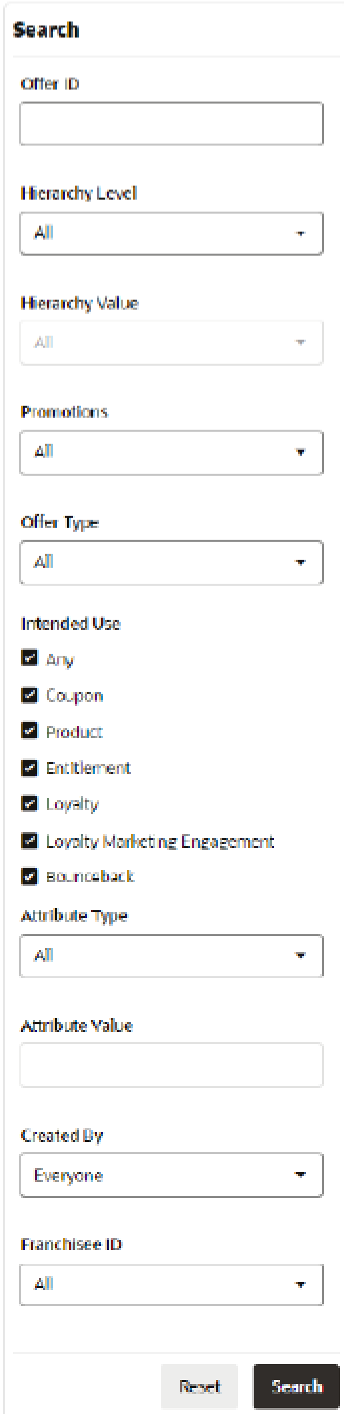
Figure 7-3 Action Menu Options - Offers Quick Search



Offers Advanced Search

The Offer Advanced search allows you to select more criteria that are not available in the Offer Quick Search box.

Figure 7-4 Offer Advanced Search Window



The following Search fields are available:

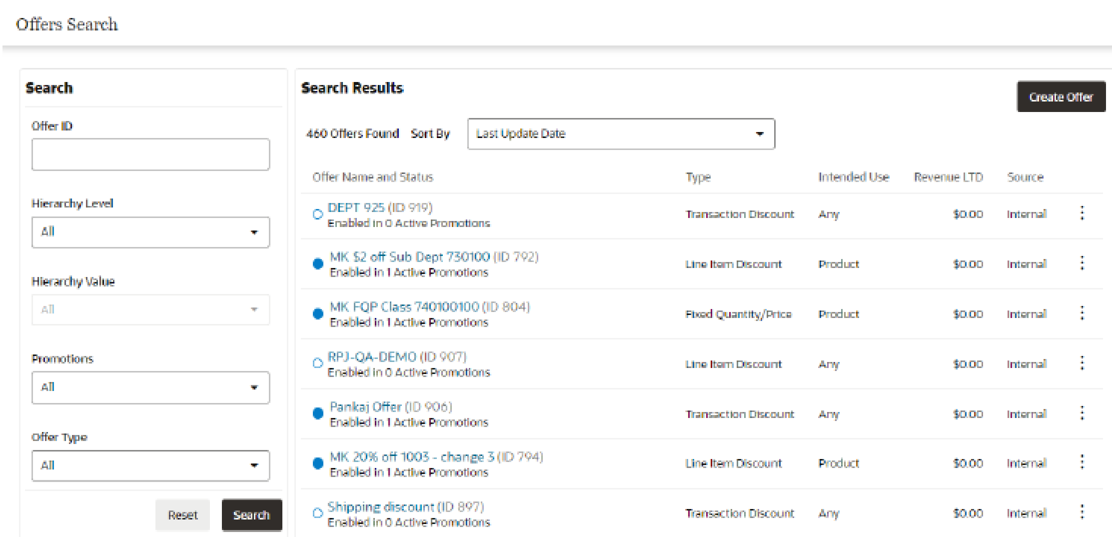
- **Offer ID** - This Text Field searches all the Offers currently present in the application. The default is an empty field.
- **Hierarchy Level** - The Merchandise Hierarchy Level, which consists of: Item ID, Department, Sub-Department, Class, Sub-Class, and Style ID. This will default to All. Example: You select Hierarchy level as Department.

- **Hierarchy Value** - The search box included on the top of the list allows you to search for a specific Department. As you begin to type, the application then displays any matching Departments. The field also includes a list of available departments from which to select. This will default to All.
- **Promotions** - To search for Offers which are part of Promotions. This will default to All. Options include:
  - All
  - Active
  - Inactive
- **Offer Type** -Search for Offers by Offer Type, which will be based on available Offer Types configured in the System Configuration module. Following are the current Offer Types. The default field is All.
  - Buy X Get Points
  - Buy X Get X
  - Buy X Get Y
  - Fixed Quantity/Price
  - Gift with Purchase
  - Kit
  - Line Item Discount
  - Marketing Engagements
  - Tiered Discount
  - Transaction Discount
  - Bounceback Trigger
- **Intended Use (Required)** - Search for Offers by the Intended Use assigned. By default, All will be checked.
  - Any
  - Coupon
  - Product
  - Entitlement
  - Loyalty
  - Loyalty Marketing Engagement
  - Bounceback
- **Attribute Type** - Search the Offer by the Attribute assigned to the Offer. The field will default to All.
- **Attributes Value** - Type-ahead search according to the selected Attribute Type.
- **Created By**- List of Associates who created Offers. This defaults to Everyone.
- **Franchisee ID** - This Text Field searches for Offers by the Franchisee associated with the Offer. The Franchisee ID field will only be visible if the `EnableFranchiseSupport` configuration is enabled and Franchisees are defined. Only Franchisees associated with the user are shown. This defaults to All.

Searching Offers

Once all the desired information has been entered, click **Search** to see the results.

Figure 7-5 Offers Search Results



Note:

Click **Reset** to clear all fields and return list values to the default selections. You can also click Search without entering any criteria to see a complete list of offers.

Sorting Offer Results

The results can be sorted by the following options:

- Last Update Date (Default)
- Offer ID
- Offer Name
- Number of Active Promotions
- Offer Revenue
- Offer Type
- Intended Use

Creating Offers

In Customer Engagement, Offers are price incentives given to the customer. These Offers can often be reused in separate Promotions or Card Programs. To facilitate and reuse existing Offers, a library of Offers can be created in Customer Engagement.

Process by Offer Type

The Create Offers process depends on the type of offer you create with the Create Offer Wizard. In the wizard, the tabs are dynamic and vary by Offer Type.

Table 7-1 shows the Create Offer process by offer type and a link to its procedure. Refer to the section, Create Offers Procedure, for specifics about the steps to create offers.

Table 7-1 Create Offer Process by Offer Type

Offer Type	Tab 1	Tab 2	Tab 3	Tab 4	Tab 5	Tab 6	Tab 7
Transaction Discount	Information Updating the Information Tab	Franchisees Assignment Updating the Franchisees Assignment Tab	Attributes Updating the Attributes Tab	Qualifying Items Define Qualifying Items for Offer Group 1	Award Items Update Award Items for Group A	Shipping Awards Update Shipping Awards Tab	Review Tab Transaction Discount Review
Line Item Discount	Information Updating the Information Tab	Franchisees Assignment Updating the Franchisees Assignment Tab	Attributes Updating the Attributes Tab	Qualifying Items Define Qualifying Items for Offer Group 1	Award Items Update Award Items for Group A	Shipping Awards Update Shipping Awards Tab	Review Line Item Discount Review
Fixed Quantity/ Price	Information Updating the Information Tab	Franchisees Assignment Updating the Franchisees Assignment Tab	Attributes Updating the Attributes Tab	Qualifying Items Define Qualifying Items for Offer Group 1	Award Items Update Award Items for Group A	Shipping Awards Update Shipping Awards Tab	Review Fixed Quantity/ Price Review
Gift with Purchase	Information Updating the Information Tab	Franchisees Assignment Updating the Franchisees Assignment Tab	Attributes Updating the Attributes Tab	Qualifying Items Define Qualifying Items for Offer Group 1	Award Items Update Award Items for Gift with Purchase	Shipping Awards Update Shipping Awards Tab	Review Gift with Purchase Review
Buy X Get X	Information Updating the Information Tab	Franchisees Assignment Updating the Franchisees Assignment Tab	Attributes Updating the Attributes Tab	Qualifying Items Define Qualifying Items for Offer Group 1	Award Items Update Award Items for Buy X Get X	Shipping Awards Update Shipping Awards Tab	Review Buy X Get X Review
Buy X Get Points	Information Updating the Information Tab	Franchisees Assignment Updating the Franchisees Assignment Tab	Attributes Updating the Attributes Tab	Qualifying Items Define Qualifying Items for Offer Group 1	Award Items Update Award Points for Buy X Get Points	Tender Type Define Tender Type for Buy X Get Points	Review Buy X Get Points Review
Kit	Information Updating the Information Tab	Franchisees Assignment Updating the Franchisees Assignment Tab	Attributes Updating the Attributes Tab	Qualifying Items Define Qualifying Items for Offer Group 2	Award Items Update Award Items for Offer Type Kit	Shipping Awards Update Shipping Awards Tab	Review Kit Review

Table 7-1 (Cont.) Create Offer Process by Offer Type

Offer Type	Tab 1	Tab 2	Tab 3	Tab 4	Tab 5	Tab 6	Tab 7
Buy X Get Y	Information Updating the Information Tab	Franchisees Assignment Updating the Franchisees Assignment Tab	Attributes Updating the Attributes Tab	Qualifying Items Define Qualifying Items for Offer Group 2	Award Items Update Award Items for Buy X Get Y	Shipping Awards Update Shipping Awards Tab	Review Buy X Get Y Review
Tiered Discount	Information Updating the Information Tab	Franchisees Assignment Updating the Franchisees Assignment Tab	Attributes Updating the Attributes Tab	Qualifying Items Define Qualifying Items for Offer Tiered Discount	Award Items Define Tiered Discount	Review Tiered Discount Review	Not Applicable
Marketing Engagements	Information Updating the Information Tab	Franchisees Assignment Updating the Franchisees Assignment Tab	Attributes Updating the Attributes Tab	Award Items Updating Award Points for Marketing Engagements	Review Marketing Engagements Review	Not Applicable	Not Applicable
Bounceback Trigger	Information Updating the Information Tab	Franchisees Assignment Updating the Franchisees Assignment Tab	Attributes Updating the Attributes Tab	Qualifying Items Define Qualifying Items for Offer Group 1	Review Bounceback Trigger Review		

Create Offers Procedure

The following procedure describes the steps to create an offer. Refer to specific details for each tab in these sections:

- Updating the Information Tab
- Updating the Franchisees Assignment Tab
- Updating the Attributes Tab
- Updating the Qualifying Items Tab
- Update Award Items Tab
- Define Tiered Discount
- Update Shipping Awards Tab
- Updating Award Points for Marketing Engagements
- Using the Review Tab

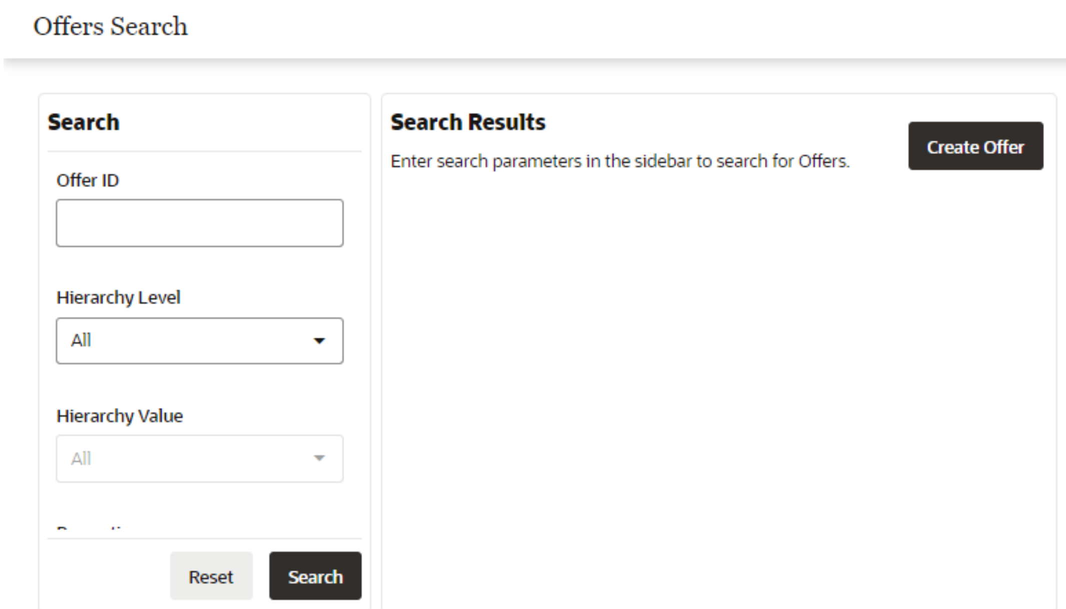
Procedure

To create an offer:

1. Click the **Tasks** icon.
2. Click **Campaign**.

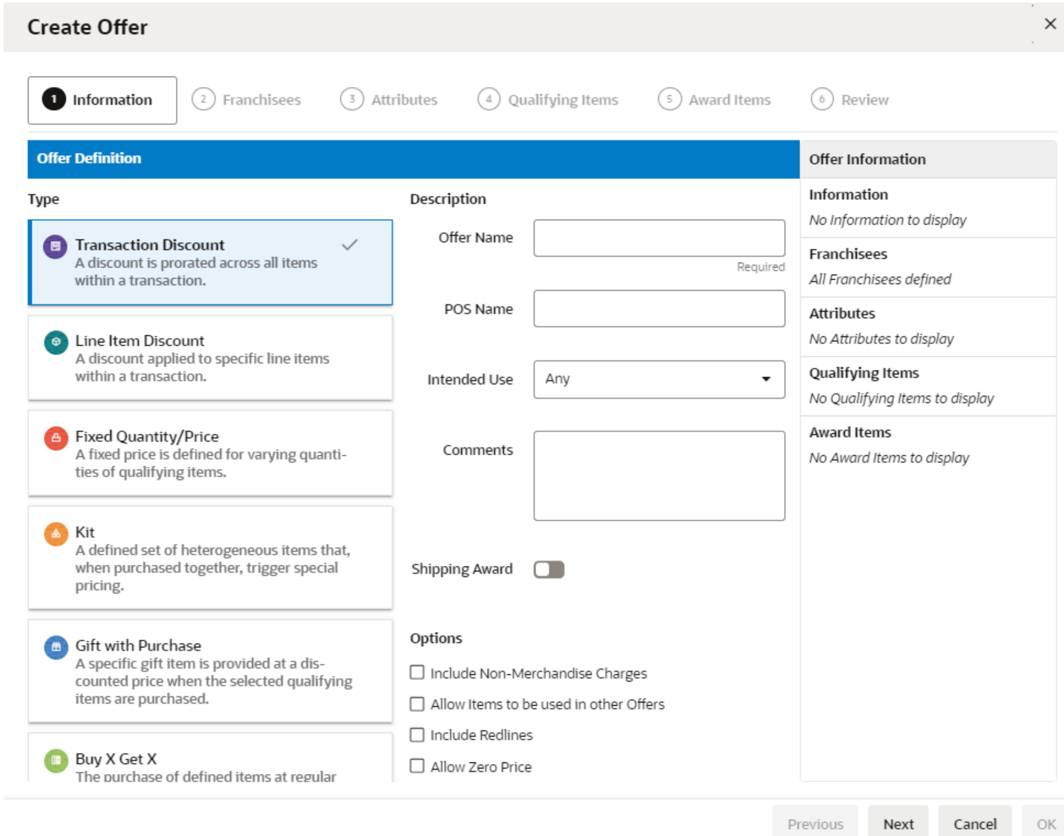
3. Click **Offers Search**. Results: The Offers Search window opens.

Figure 7-6 Offers Search



4. Click **Create Offer**. This opens the Create Offer Wizard. The Create Offer wizard may contain any of the following tabs, depending on configuration:
   - Information
   - Franchisees
   - Attributes
   - Qualifying Items
   - Award Items or Discount Tiers
   - Shipping Awards
   - Award Points
   - Review
5. Update the Information tab. For details, refer to "Updating the Information Tab." After updating the Information tab, Click **Next** to continue to the next tab.

Figure 7-7 Information Tab

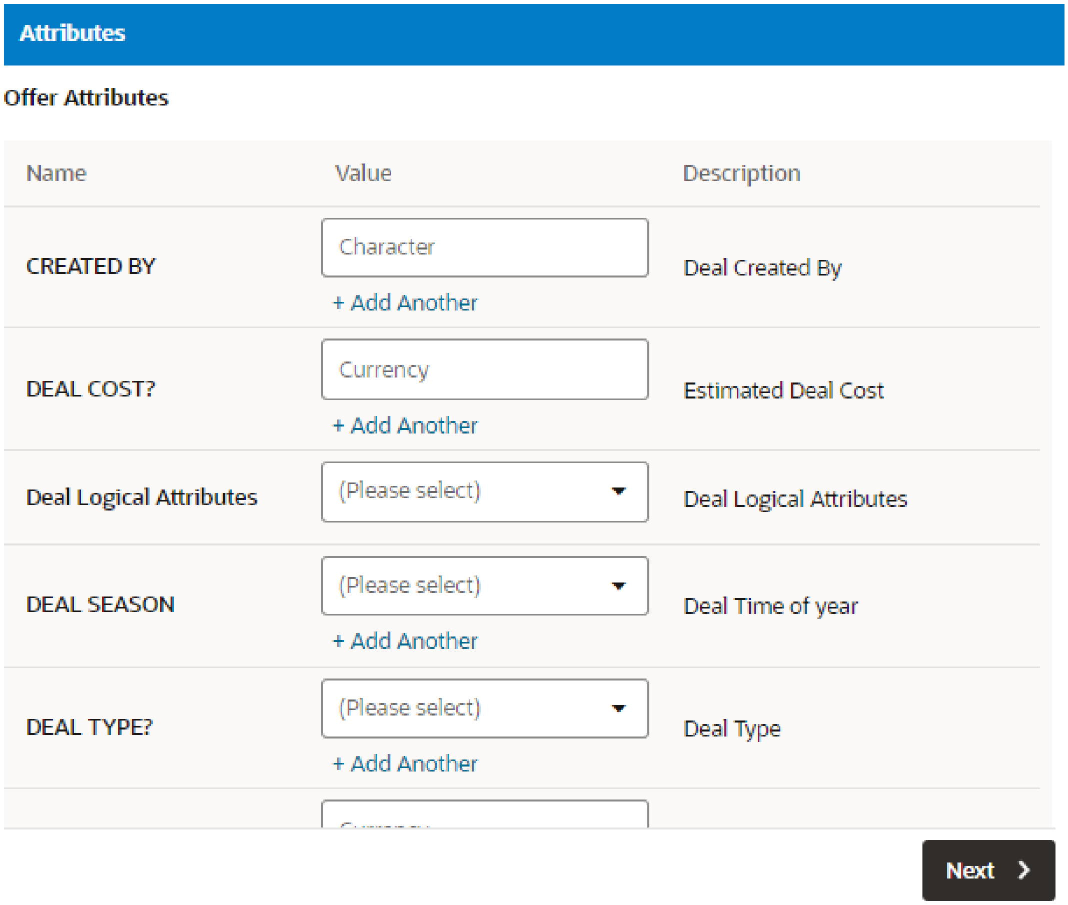


6. Update the Franchisees Assignment tab. For details, refer to "Updating the Franchisees Assignment Tab." After updating the Franchisees Assignment tab, Click **Next** to continue to the next tab.

Figure 7-8 Franchisee Tab

7. Update the Attributes tab. For details, refer to "Updating the Attributes Tab." Click **Next** to continue to the next tab.
   a. This Attributes tab does not apply to the offer type, Marketing Engagements. Continue to Updating Award Points for Marketing Engagements.

Figure 7-9 Attributes Tab



8. Update the Qualifying Items tab. The Qualifying Items Tab is used to define which Items are included and excluded in the Offer. For details, refer to "Updating the Qualifying Items Tab."

   After completing the Qualifying Items tab, click **Next** to continue to the next tab as listed in Table 7-5.

Figure 7-10 Qualifying Items Tab

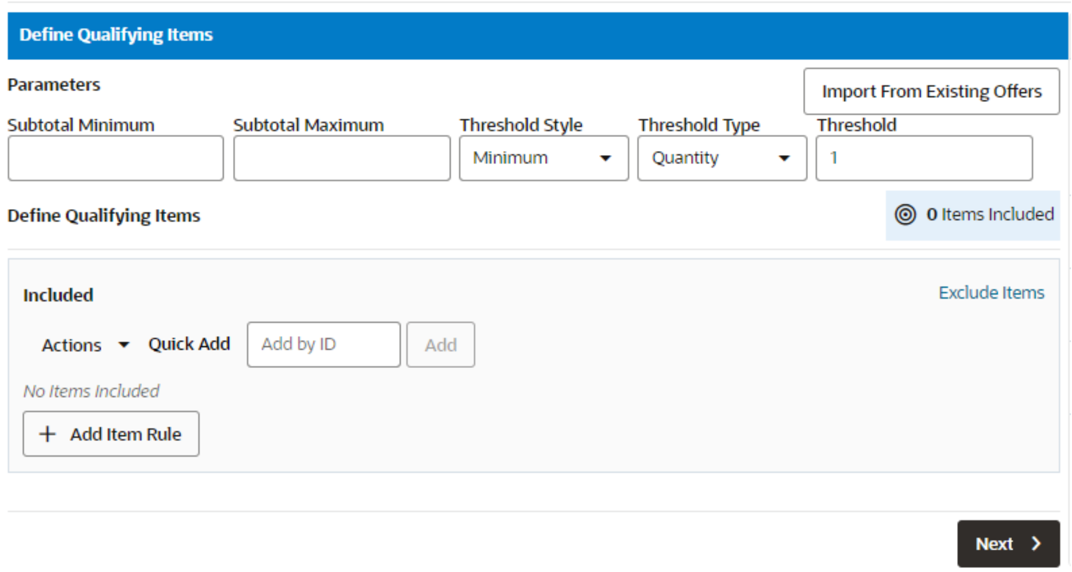


Table 7-5 lists the next section by offer type.

Table 7-2 Next Step After Defining Qualifying Items by Offer Type

Offer Type	After Defining Qualifying Items, Continue To...
Transaction Discount	Update Award Items for Group A
Line Item Discount	
Fixed Quantity/Price	
Gift with Purchase	Update Award Items for Gift with Purchase
Buy X Get X	Update Award Items for Buy X Get X
Buy X Get Points	Update Award Points for Buy X Get Points
Kit	Update Award Items for Offer Type Kit
Buy X Get Y	Update Award Items for Buy X Get Y
Tiered Discount	Define Tiered Discount
Marketing Engagements	Update Award Points
Bounceback Trigger	Review Tab - Bounceback Trigger

9. Update the Award Items tab. For details, refer to "Update Award Items Tab." Click **Next** to continue to the next tab.

   After completing the Award Items tab, click **Next** to continue to the next tab as listed in Table 7-6.

Figure 7-11 Define Award Items Tab

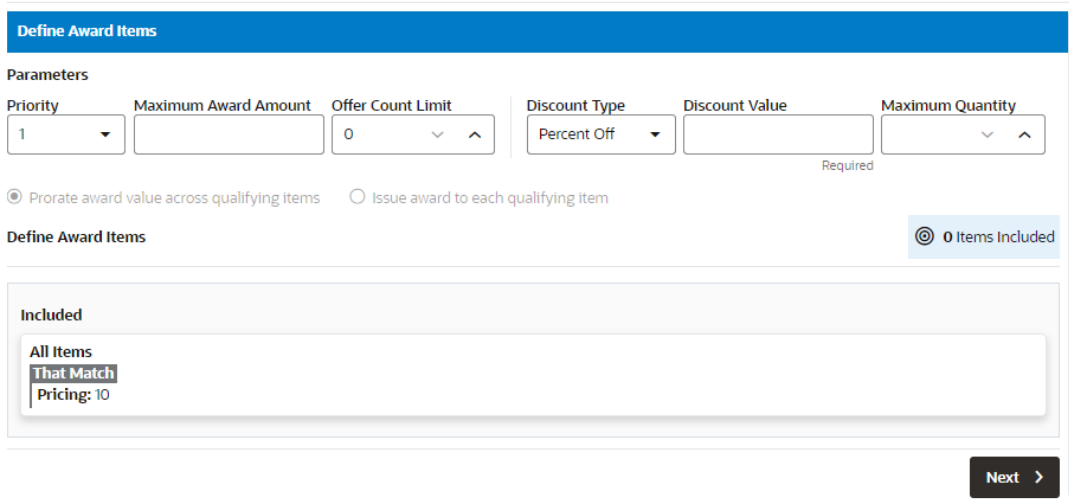


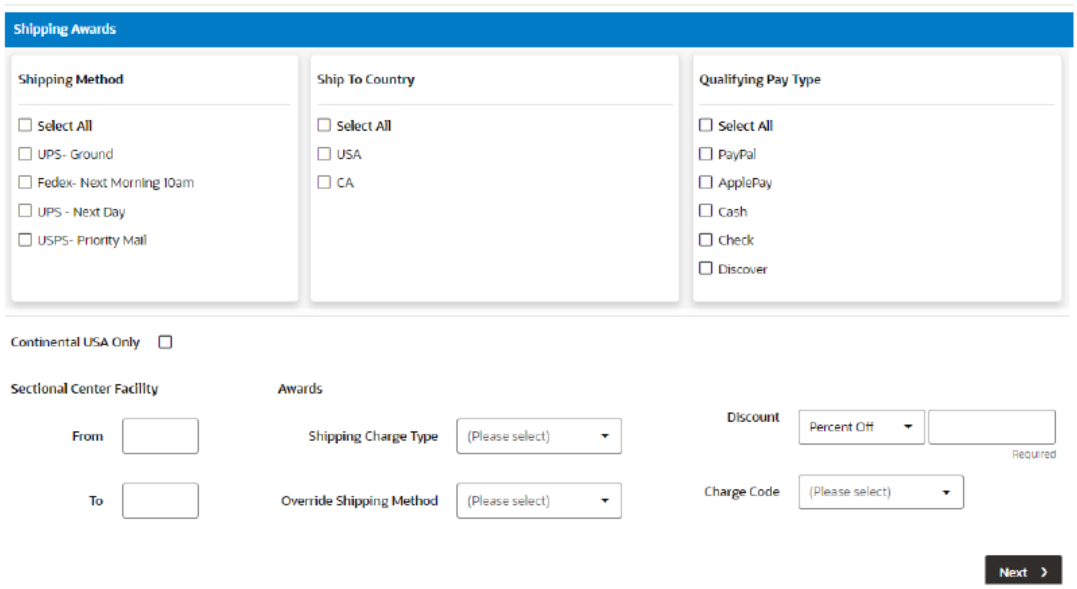
Table 7-6 lists the next section by offer type.

Table 7-3 Next Step After Defining Award Items/Points by Offer Type

Offer Type	After Defining Award Items/Points, Continue To...
Transaction Discount	Update Shipping Awards Tab
Line Item Discount	
Fixed Quantity/Price	
Gift with Purchase	
Buy X Get X	
Buy X Get Points	Define Tender Type for Buy X Get Points
Kit	Update Shipping Awards Tab
Buy X Get Y	
Tiered Discount	
Marketing Engagements	Marketing Engagements Review

10. Update the Shipping Awards tab. The Shipping Awards Tab is used to define what shipping methods and other award rules are used for the offer. For details, refer to "Update Shipping Awards Tab."

Figure 7-12 Shipping Awards Tab



After completing the Shipping Awards tab, click **Next** to continue to the next tab as listed in Table 7-4.

Table 7-4 Next Step After Defining Shipping Awards by Offer Type

Offer Type	After Defining Shipping Awards, Continue To...
Transaction Discount	Transaction Discount Review
Line Item Discount	Line Item Discount Review
Fixed Quantity/Price	Fixed Quantity/Price Review
Gift with Purchase	Gift with Purchase Review
Buy X Get X	Buy X Get X Review
Buy X Get Points	No shipping awards, continue to: Buy X Get Points Review
Kit	Kit Review
Buy X Get Y	Buy X Get Y Review
Tiered Discount	Tiered Discount Review
Marketing Engagements	Marketing Engagements Review

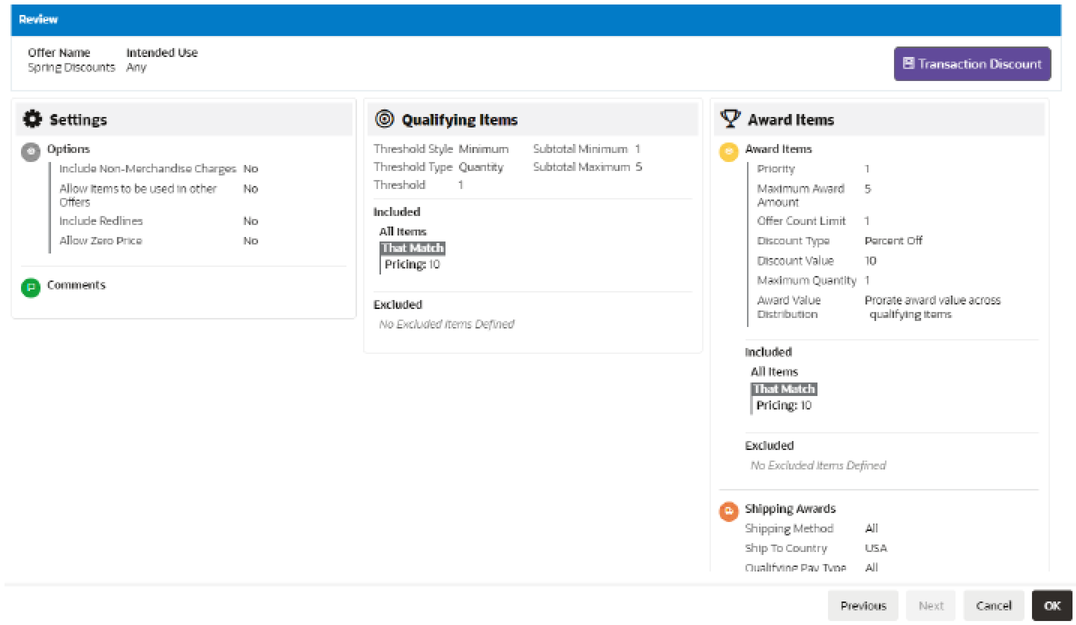
11. The **Review** tab displays key elements in the Offer Setup.

    For details by offer type, refer to "Using the Review Tab."

    Click **OK** to create the offer, or click **Cancel** to close without saving.

> **Note:**
>
> Before you save the offer, you can use the **tab links** along with **Previous** and **Next** to go back to any point in the create Offer process and make changes.

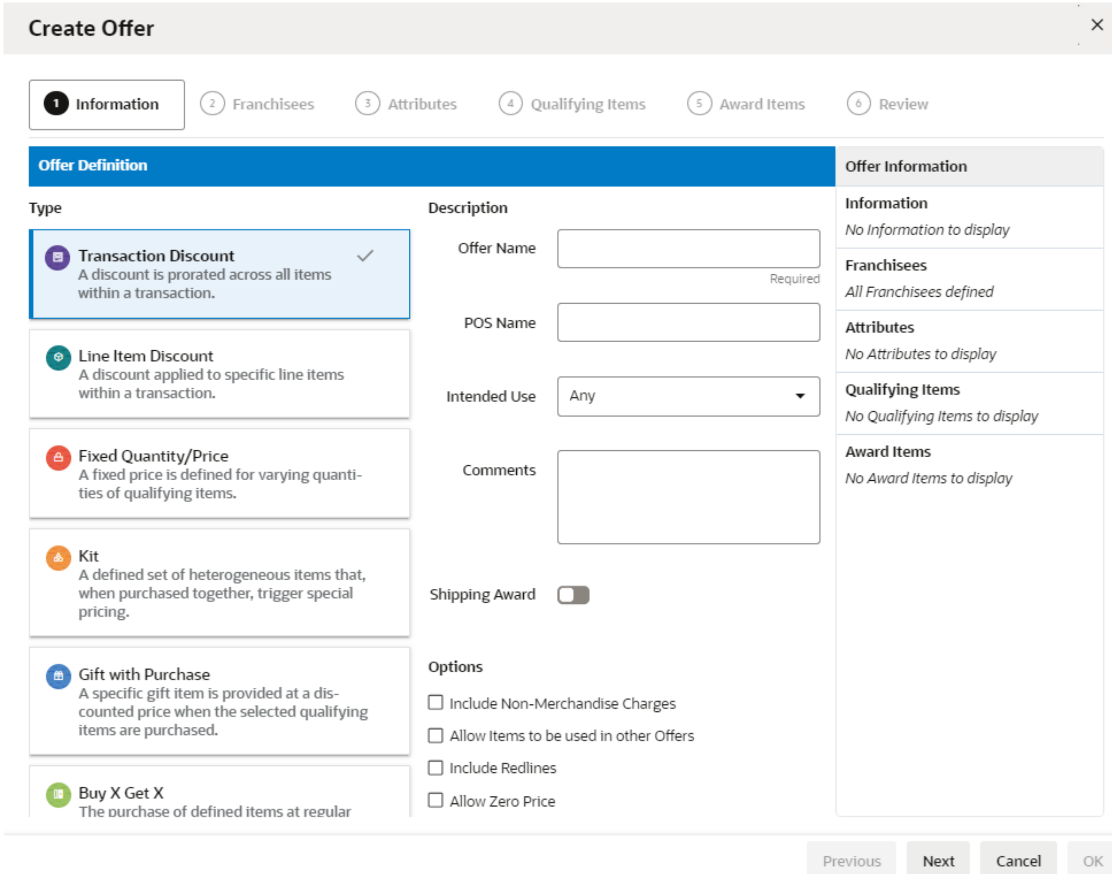
Figure 7-13 Review Tab - Example



Updating the Information Tab

For Step 5 under the section Creating Offers update the Information Tab and return to Step 6.

Figure 7-14 Information Tab



The Information tab has these components:

- Type Pane
- Description Pane
- Options Pane
- Time Rules
- Offer Information Panel

> **Note:**
>
> The read-only Offer Information Panel displays details throughout all tabs of the wizard.

Type Pane

Select the type of offer from the available options.

- Transaction Discount
- Line Item Discount

- Fixed Quantity/Price
- Kit
- Gift with Purchase
- Buy X Get X
- Buy X Get Y
- Tiered Discount
- Buy X Get Points
- Marketing Engagements
- Bounceback Trigger

Description Pane

Update the fields in the Description Pane. Required fields are noted by an asterisk.

- **Offer Name (Required)** – Enter a name for the offer.
- **POS Name** – Enter the name for the Offer to be displayed in the POS system.
- **Intended Use (Required)** – Select the type of Promotion in which the Offer is to be used.
  - Any (Default)
  - Coupon
  - Product
  - Entitlement
  - Bounceback

> **Note:**
>
> By Default, Loyalty is the only Intended Use available when creating Buy X Get Points. For Marketing Engagement Offers the only intended use is Loyalty Marketing Engagement. For Bounceback Trigger Offers the only intended use is Bounceback.

- **Comments** – Enter any comments about the Offer in the text box.
- **Shipping Award** – If available, toggle the switch to activate the offer for shipping awards.

Options Pane

Select any available options to be applied to the Offer.

- **Include Non-Merchandise Charges** – This Check Box determines whether non-merchandise charges are included in the Offer (The default is a clear check box that indicates No)).
- **Allow Items to be used in other Offers** – This check box indicates whether the items used in the Offer can be used again in other Offers applied to a transaction. If clear (default), the items can only be used in one offer per transaction. If checked, the items can be used in more than one offer per transaction.

- **Include Redlines** – This check box determines whether Redlines are included in the Offer (The default is a clear check box that indicates No).
- **Allow Zero Price** – This check box determines whether zero-priced items are included in the Offer (The default is a clear check box that indicates No).

Time Rules

Time Rules are unavailable if **Entitlement** is selected for **Intended Use** in the Description Pane.

Adding Time Rules

Multiple Time Rules can be added to Offers. Perform the following steps to add Time Rules to Offers.

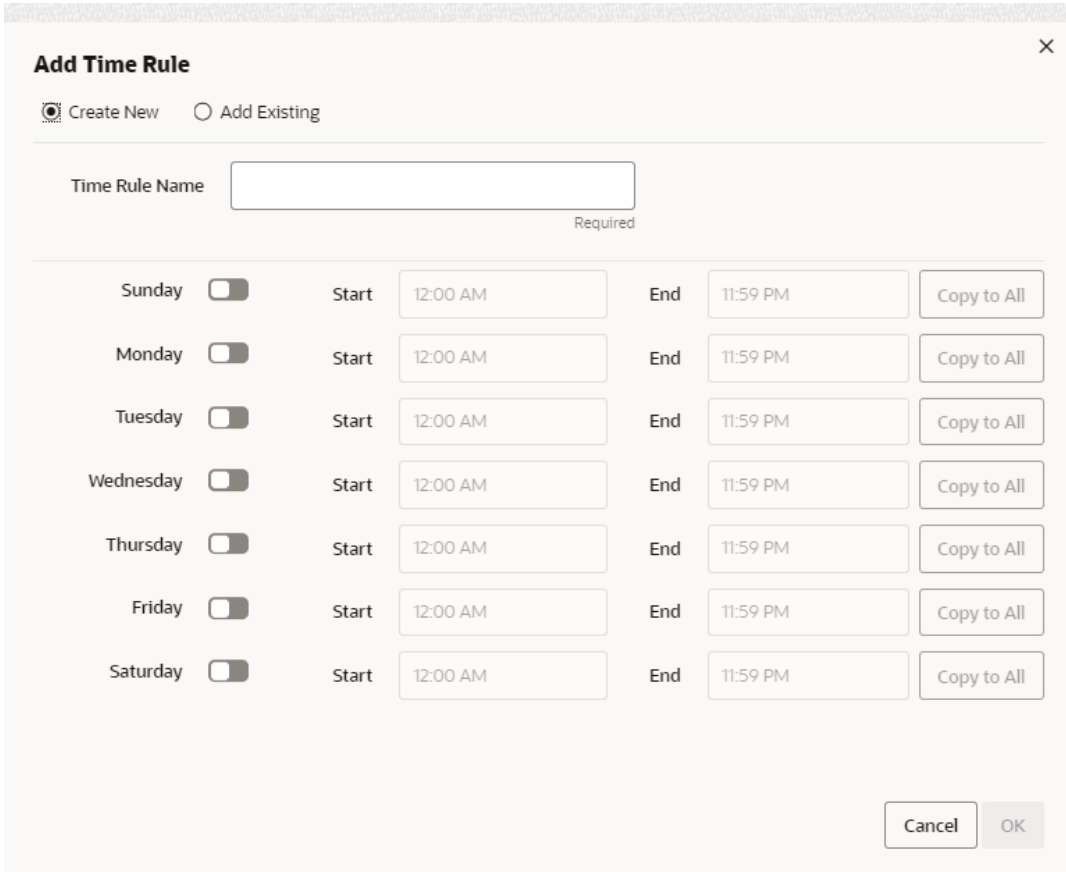
1. There are two methods to add Time Rules to an Offer, either:
   - Click **+Add Time Rule**.
   - Select the **Quick Add** option and enter a known **Time Rule ID** which you wish to associate with this new Offer.
2. Click **Add** to add that time rule to the Offer.

Creating New Time Rules

Perform the following steps to create a new Time Rule.

1. Click **+ Add Time Rule**.
2. Select the **Create New** option.

Figure 7-15 Add Time Rule (Create New)



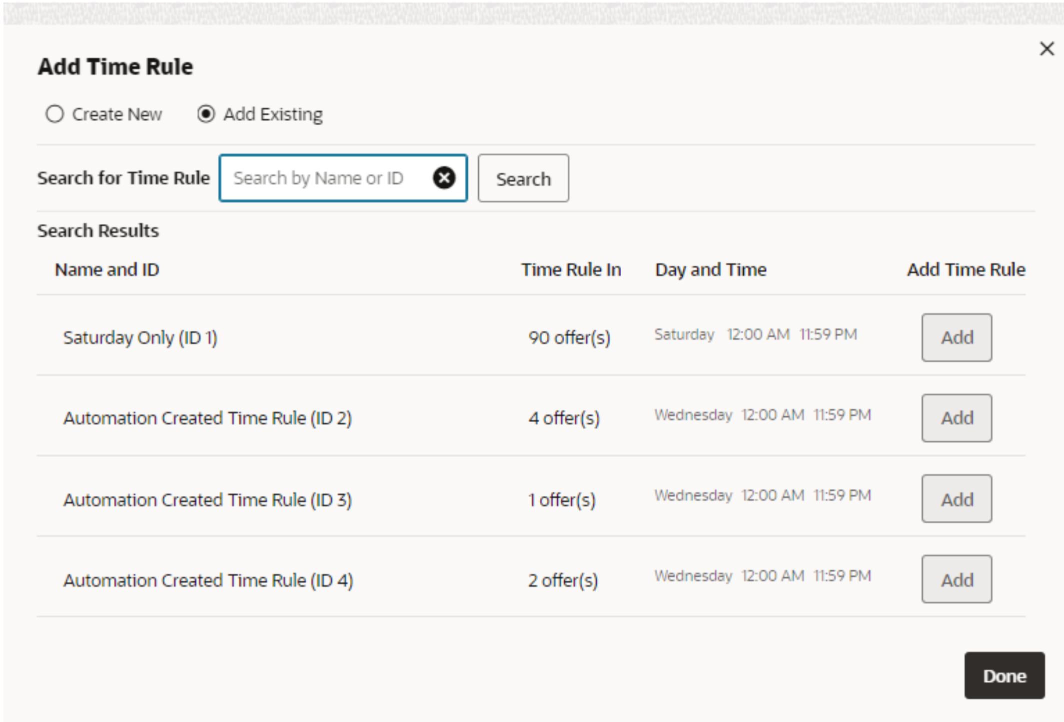
3. Update the following fields
   - Enter a **Time Rule Name** (required).
   - Select the **Day of the Week** for which the time rules will apply for this Offer.
   - Enter a **Start Time** for each day selected.
   - Enter an **End Time** for each day selected.
4. **Optional:** Click **Copy To All** to copy the settings (Start and End times) from the Day you select, to all days.
5. Click **OK** to accept the new time rule, or **Cancel** to close without saving.

Adding an Existing Time Rule

Perform the following steps to add an existing Time Rule.

1. Click **+ Add Time Rule**.
2. Select the **Add Existing** option.

Figure 7-16 Add Time Rule (Add Existing)



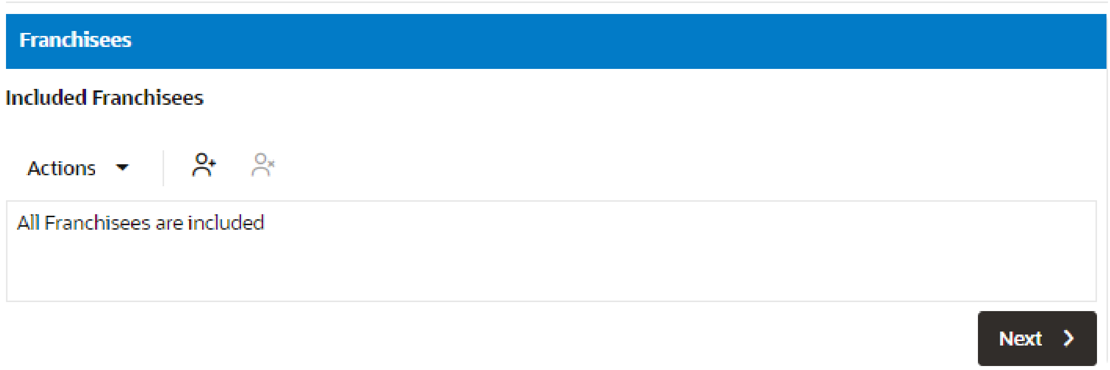
3. Enter a **Time Rule Name** or **ID** and click **Search**, or click **Search** to retrieve all existing Time Rules from which to select.
4. The Figure 7-16 window displays the available time rules to add to an existing offer. Information for each existing time rule includes:
   - **Name and ID** – The name and ID of the Time Rule
   - **Time Rule In** – The number of offers the Time Rule is already associated with.
   - **Days** – The days of the week the Time Rule is active.
   - **Start** – The Start time for each corresponding day.
   - **End** – The End time for each corresponding day.
   - **Add** – Adds a Time Rule.
5. Click **Add** for the desired Time Rule you wish to add to the Offer.
6. Click **Done**.

Updating the Franchisees Assignment Tab

For Step 6 under the section Creating Offers update the Franchisees Assignment tab and return to Step 7.

The Franchisees Assignment tab allows you to view or change the Franchisees to which an Offer is assigned. The Franchisee tab is only visible if the `EnableFranchiseSupport` configuration is enabled, and Franchisees are defined. By default, all franchisees are included on the Offer. If you are assigned to specific franchisees, only those franchisees you are associated with are shown.

Figure 7-17   Franchisee Tab

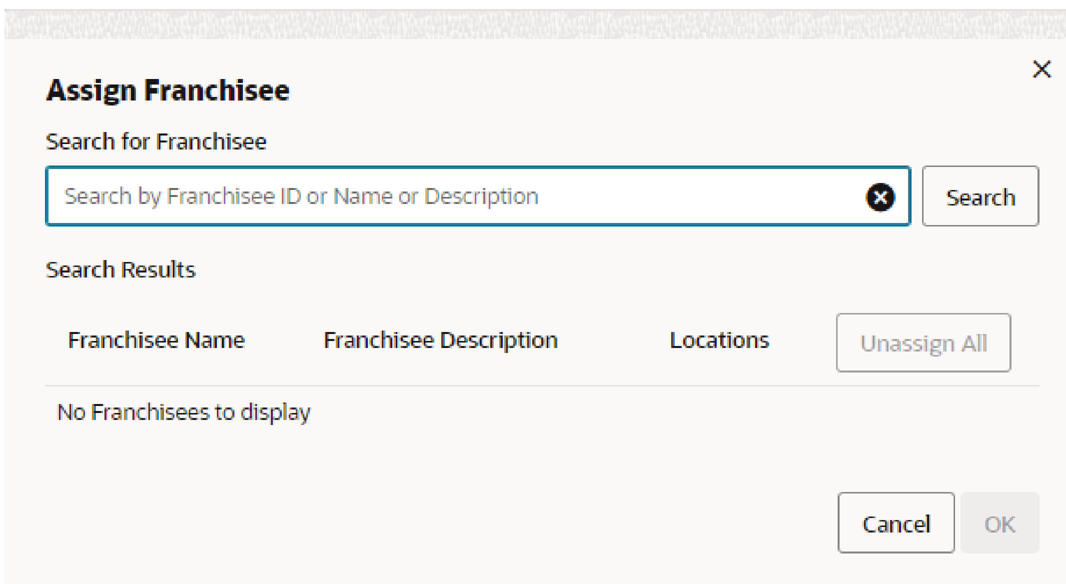


Assigning a Franchisee

Perform the following steps to assign a franchisee.

1. Click the **Action Menu**, and click **Assign**, or click the **Add (+)** icon. The Figure 7-18 window opens.

Figure 7-18   Assign Franchisee



2. Enter part or all of the **Franchisee Name**, **Franchisee Description**, or **Location**.

> **Note:**
>
> You also have the option to enter no search criteria and click **Search** to retrieve all available franchisees from which to select for assignment.

3. Click **Search**.

4. Click **Assign All** to assign all the search results, or click **Assign** for a specific franchisee.
5. Click **OK** to accept the changes or **Cancel** to close the window without saving.

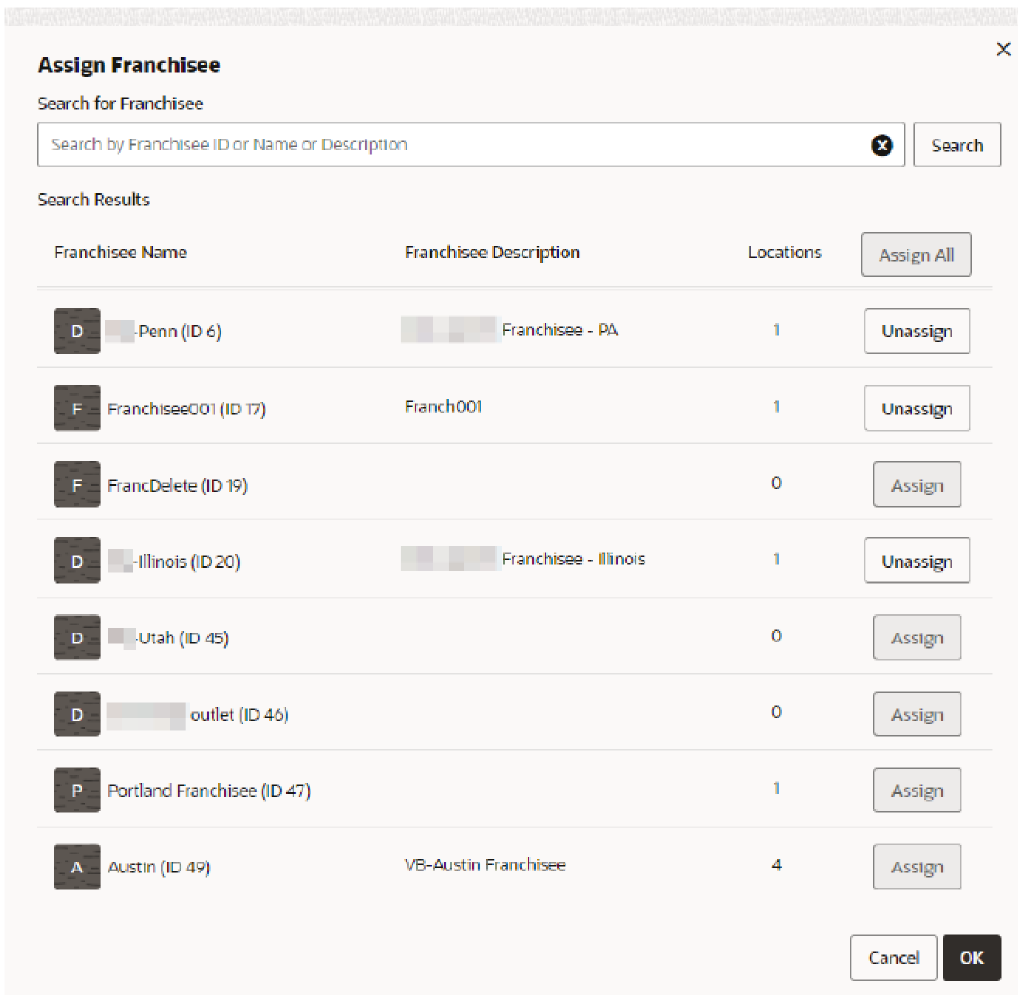
> **Note:**
>
> A confirmation notification appears to confirm the Franchisees has been assigned.
>
> After a Franchisee is assigned, it appears at the top of the list. The rest of the Franchisees are ordered by ID.

Unassigning a Franchisee

Perform the following steps to unassign a franchisee.

1. There are two ways to unassign a Franchisee assigned to an Offer.
   a. In the Figure 7-18 window, click **Unassign** on any Franchisees currently assigned to the Offer.

Figure 7-19 Assign Franchisee (Using the Unassign Button)



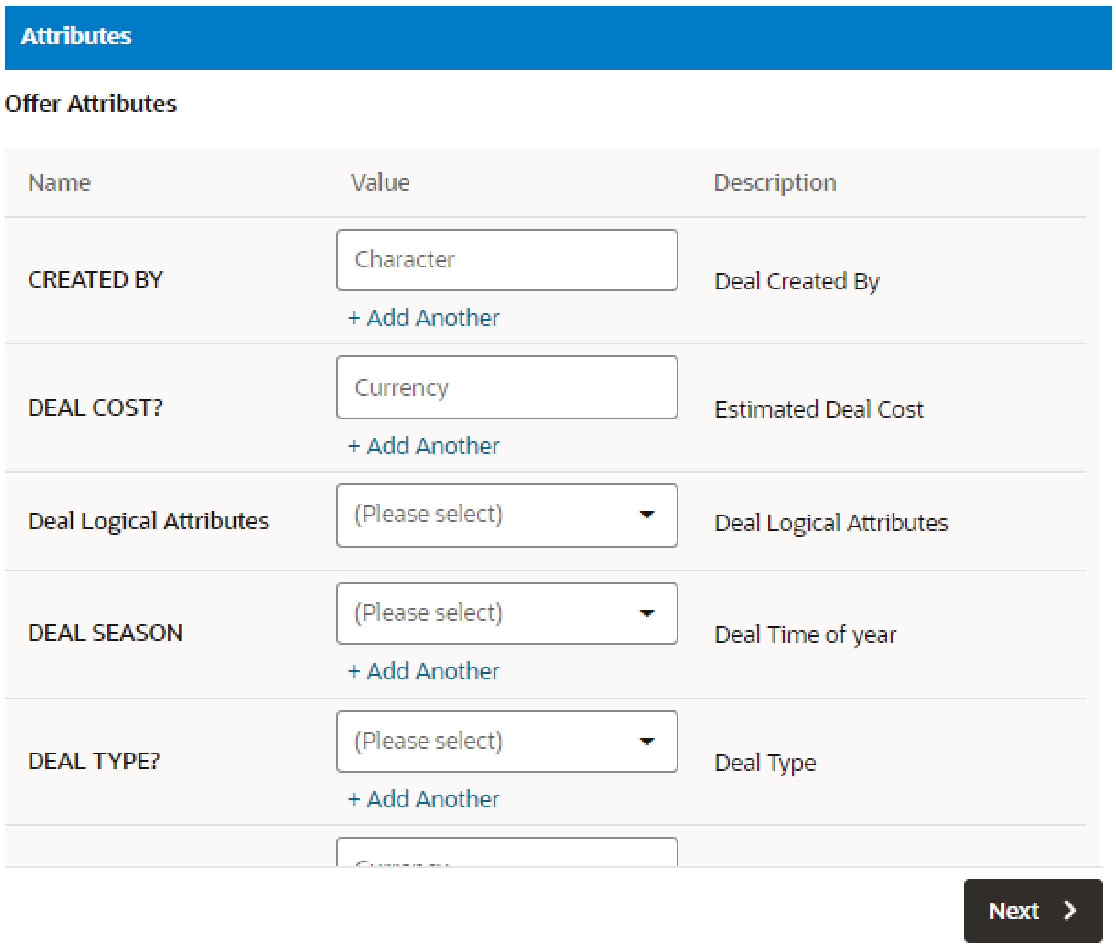
b. If Franchisees are listed on the Franchisee tab in the Included Franchisees table, highlight the **row**, and then select the **Action Menu**, and click **Unassign**, or click the **Unassign X** icon to remove the associated Franchisee.

2. A confirmation notification appears that confirms the Franchisees are deleted.

Updating the Attributes Tab

For Step 7 under the section Creating Offers update the Attributes tab and return to Step 8.

Figure 7-20 Attributes Tab



Perform the following steps to update the Attributes tab.

1. Enter the following for the Attributes Tab. Attributes can be added to the Offer to further distinguish qualifications for the Offer.
   - Select or enter the Values for each of the required attributes (indicated by an asterisk*).
   - Add Values for any optional attributes.
   - Select or enter the configuration value for the Attribute.

> **Note:**
>
> Repeat this step for all optional Attributes you wish to add to the Offer.

2. When finished defining any attributes for the Offer, click **Next**.

Updating the Qualifying Items Tab

For Step 8 under the section Creating Offers update the Qualifying Items and return to Step 9.

The Qualifying Items tab parameters are dynamic and vary based on the type of offer selected as listed in Table 7-5.

> **Note:**
>
> This tab does not apply to the offer type, Marketing Engagements. Continue to Updating Award Points for Marketing Engagements for this offer type.

Table 7-5 Qualifying Items by Offer Type

Offer Type	Define Qualifying Items Section
Transaction Discount	Define Qualifying Items for Offer Group 1
Line Item Discount	
Fixed Quantity/Price	
Gift with Purchase	
Buy X Get X	
Buy X Get Points	
Bounceback Trigger	
Kit	Define Qualifying Items for Offer Group 2
Buy X Get Y	
Tiered Discount	Define Qualifying Items for Offer Tiered Discount

Define Qualifying Items for Offer Group 1

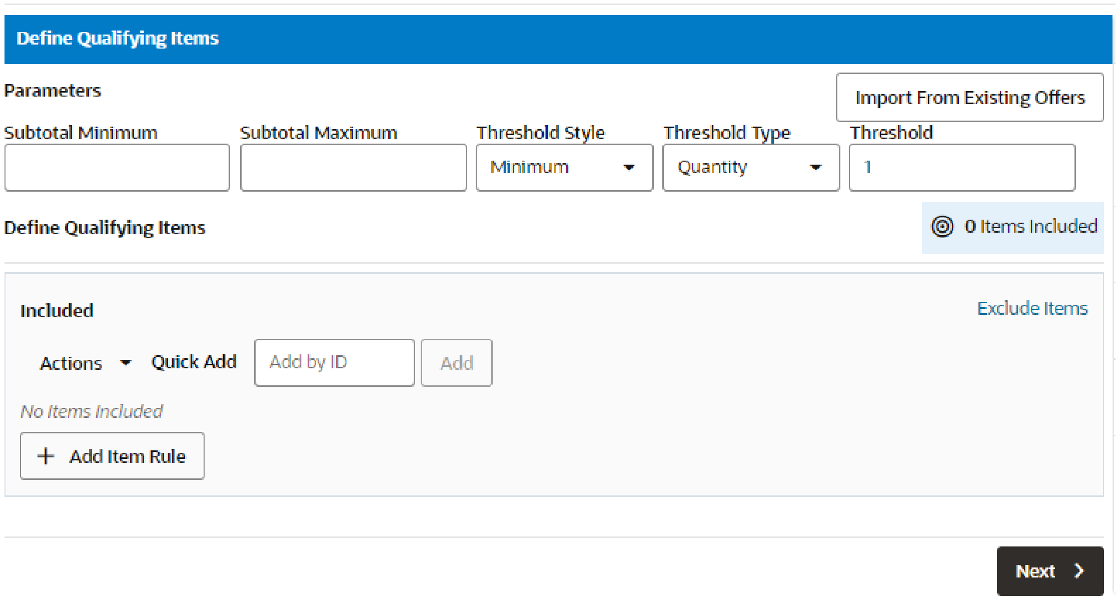
Follow the procedures in this section to update the Define Qualifying Items for Offer Group 1. Use this window to define which items are included and excluded in the Offer.

Update the Figure 7-21 for these type of offers:

- Transaction Discount
- Line Item Discount
- Fixed Quantity/Price
- Gift with Purchase
- Buy X Get X
- Buy X Get Points

- Bounceback Trigger

Figure 7-21 Define Qualifying Items Window for Group 1



> **Note:**
>
> Bounceback Trigger does not have the option to Import From Existing Offers.

Update the Parameters Pane for Group 1

The following parameters are dynamic and vary based on the type of offer selected.

- **Subtotal Minimum** – The minimum subtotal required for the transaction to be eligible for the discount.
- **Subtotal Maximum** – The maximum subtotal required for the transaction to be eligible for the discount.
- **Threshold Style** – The style of threshold to be set.

> **Note:**
>
> A threshold is the amount or quantity of qualifying items that are required to purchase in order to be eligible for this offer.

> **Note:**
>
> The available options vary, depending upon the Offer Type selected.

  - Exact
  - Minimum
- **Threshold Type** – The type of threshold.
  - Amount
  - Quantity
- **Threshold (Required)** – The amount of the threshold

Import Items for Group 1

> **Note:**
>
> Bounceback Trigger does not offer the ability to Import Items.

Import items into the Define Qualifying Items window by either:

- Import Items from Existing Offers
- Import Items from a CSV file

Import Items from Existing Offers

1. Click **Import From Existing Offers** then enter the following information:
   a. Enter some or all of the **Offer Name,** or **Offer Type** in the Search for Offer field. When searching by Offer ID the user must enter the **exact ID.**
   b. Click one or more of the **Import check boxes** for the Offers you would like to import.
   c. Click **OK** to import the Offer.

Import Items from a CSV file

> **Note:**
>
> Import from CSV is only available for the Offer Type of Buy X Get Y.

There are two methods to import items in a CSV file, either:

- Use the Action Menu.
  1. Click the **Actions Menu** and select **Import from CSV**.
  2. **Drag and Drop the File**
  3. Click **OK**
- Use File Explorer.
  1. Click **Upload**. This displays the file selection menu where you can import a set of items in a comma-separated values (CSV) format.
  2. Select a file from File Explorer.
  3. Click **Open**.
  4. Click **OK**.

> **Note:**
>
> When the file has been uploaded, the name of the file displays an **X** icon that allows you to remove the file.

Define Qualifying Items Pane for Group 1

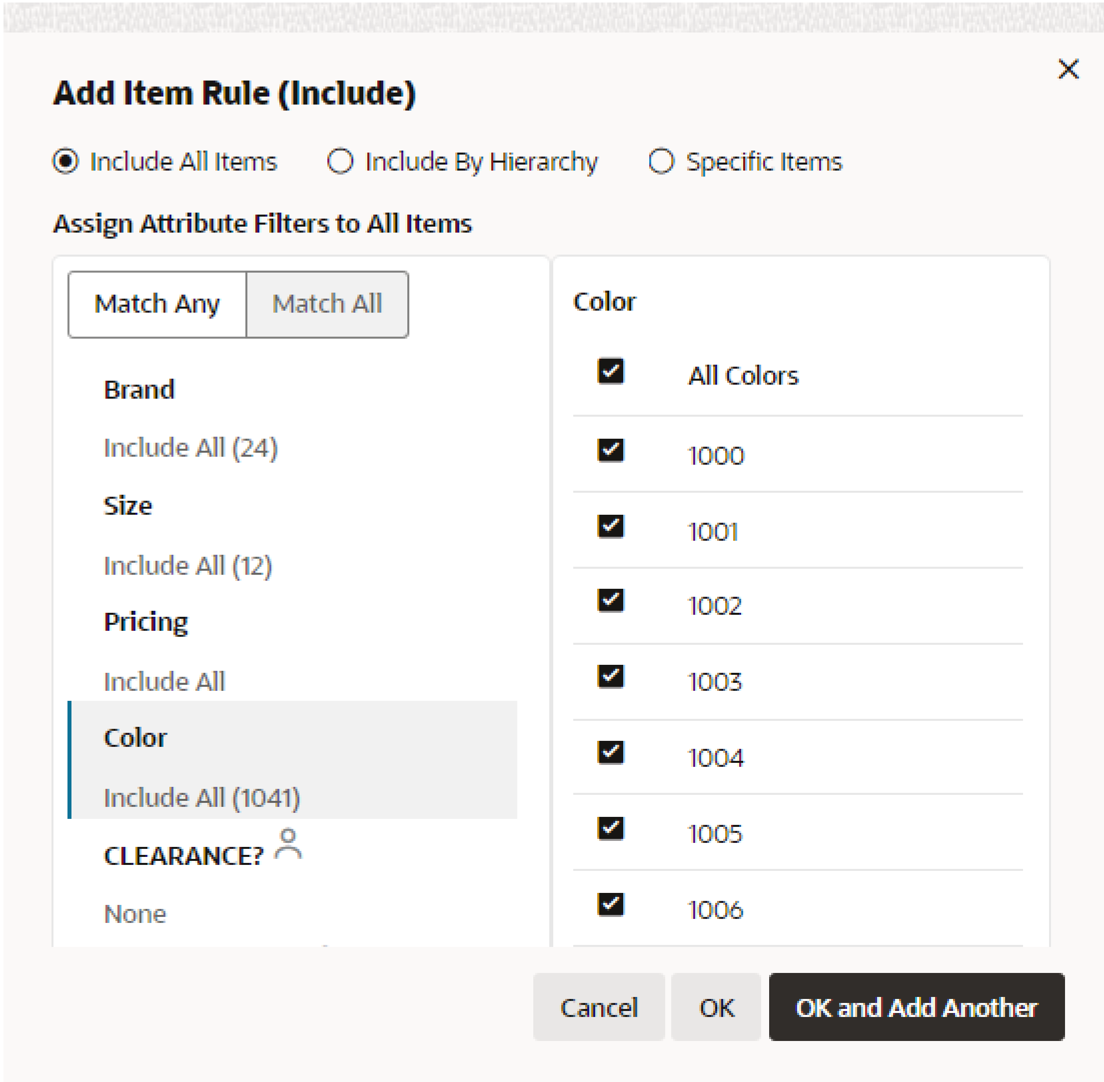
There are three methods to define Qualifying Items, either:

- Use the **Quick Add** option to enter a known **Item ID** which you wish to associate with this new Offer.

  Click **Add**.
- Click the **Actions Menu** and select **Add Item Rule**.
- Click **+Add Item Rule**.

The Figure 7-22 window opens.

Figure 7-22 Add Item Rule



You can Add Item Rules by selecting either:

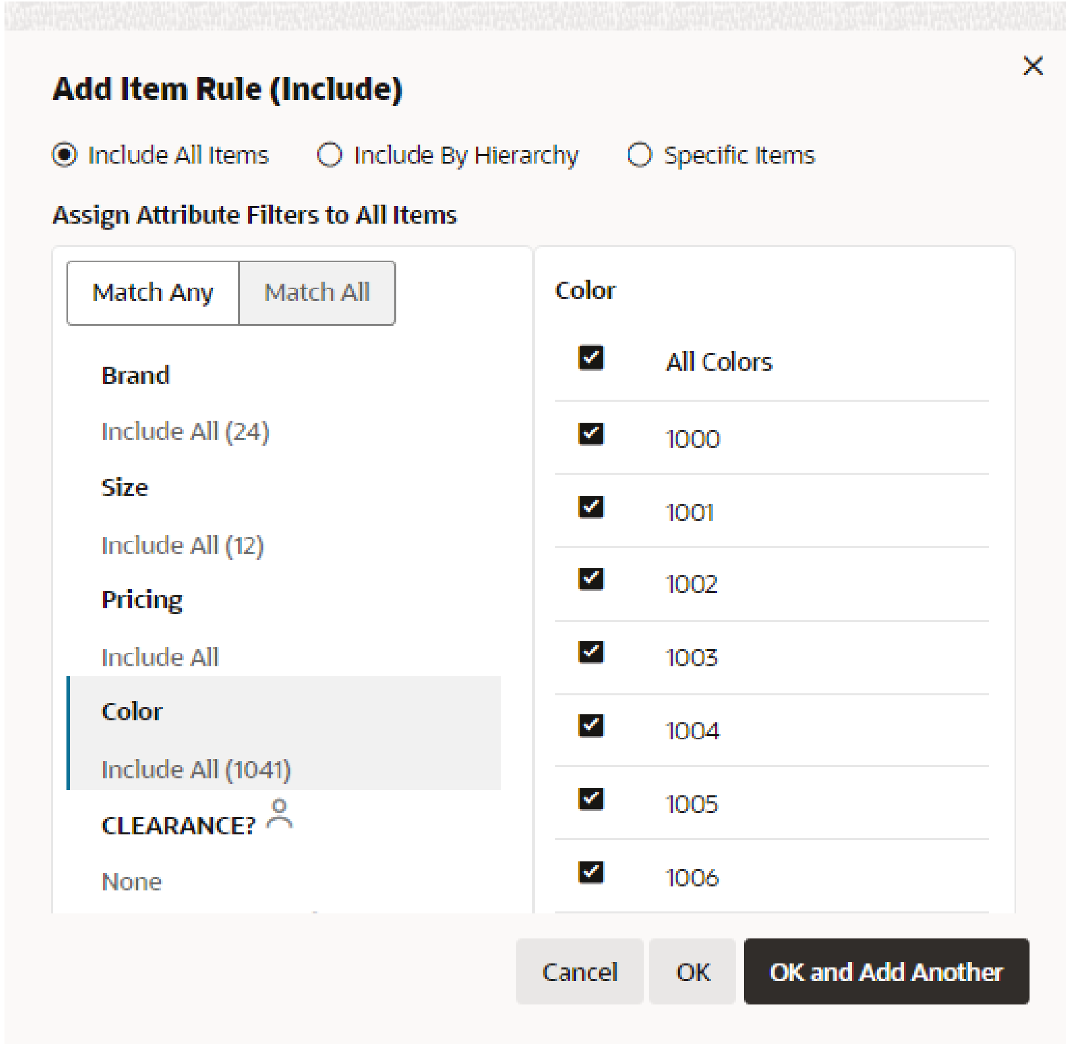
- Include All Items
- Include by Hierarchy
- Specific Items

Include All Items

Perform the following steps to add Item Rules by including all items

1. Select **Include All Items**. This enables you to use Attribute Filters for all items.

Figure 7-23 Add Item Rule (Include All Items)



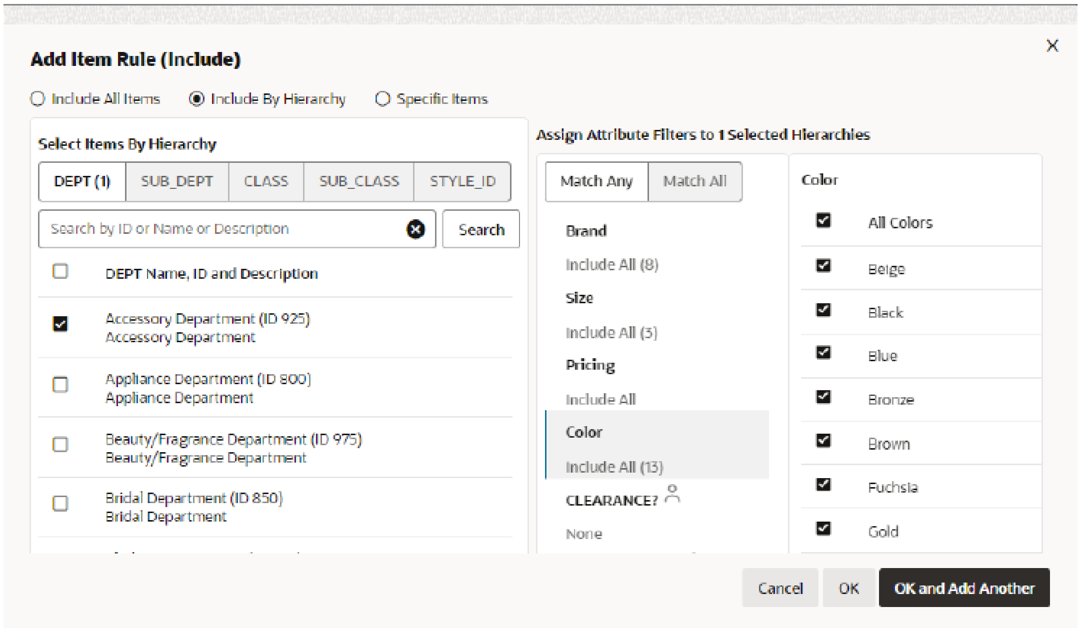
2. Click either **Match Any** or **Match All**.
3. In the left pane, select the desired attribute filter from the list of available choices Once selected, any associated values for the attribute appear in the right pane.
4. In the right pane, select or clear values of the selected attribute filter. Attributes like Season, Color, or Brand default to All selected. You can clear all values for that attribute by clearing the check mark in the top check box. Then you can sort through the list and choose specific value by selecting the associated check box.
5. Click **OK** to add the item rule to the Offer or click **OK and Add Another** to add another attribute and values. Click **Cancel** to close the window without adding the item rule.

Include by Hierarchy

Perform the following steps to add Item Rules by hierarchy.

1. Select **Include By Hierarchy**. The Figure 7-24 window opens.

Figure 7-24 Add Item Rule (Include by Hierarchy)



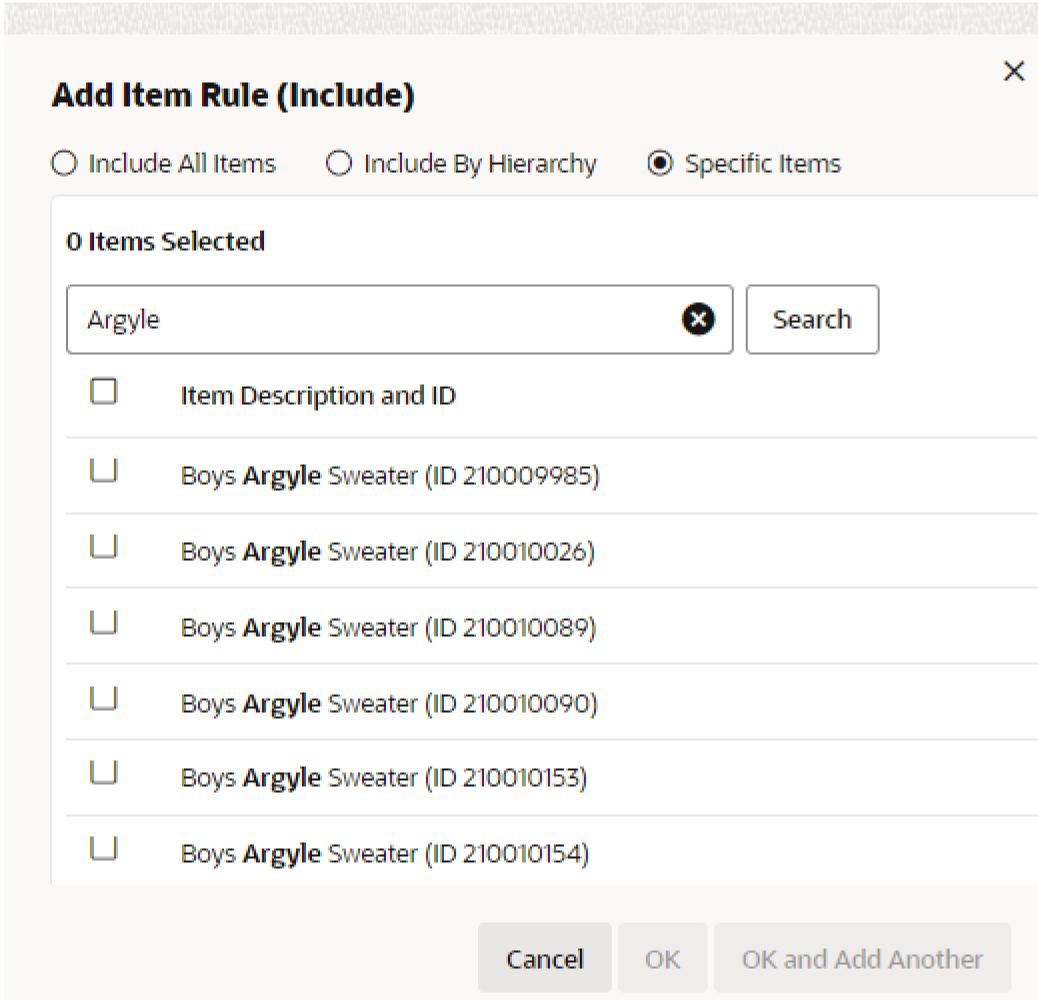
2. There are two ways to search for items in the Include by Hierarchy window, either for:
   - All items -select one of the **Hierarchy** tabs such as (**Department** or **Class**, and click **Search** to retrieve all associated items for the hierarchy.
   - Specific items -select the check box for each item you want to add to the Offer.
3. Select **Match Any** or **Match All**.
4. In the center pane, select the desired Attribute Filter from the available choices. Once selected, any associated values for the attribute appear in the right pane.
5. In the right pane, select or clear values of the selected attribute filter. Attributes like Season, Color, or Brand default to All selected. You can clear all values for that attribute by clearing the check mark in the top check box. Then you can sort through the list and choose specific values by selecting the associated check box.
6. Click **OK** to add the item rule to the Offer or click **OK and Add Another** to add another attribute and values. Click **Cancel** to close the window without adding the item rule.

Specific Items

Perform the following steps to include Item Rules by specific items.

1. Select **Specific Items**. The Figure 7-25 window opens.

Figure 7-25 Add Item Rule (Specific Items)



2. Search for Specific Items.

   In the Search box enter the **ID** or **Description** of the Item and click **Search**.A list of Items appear underneath the Search box.

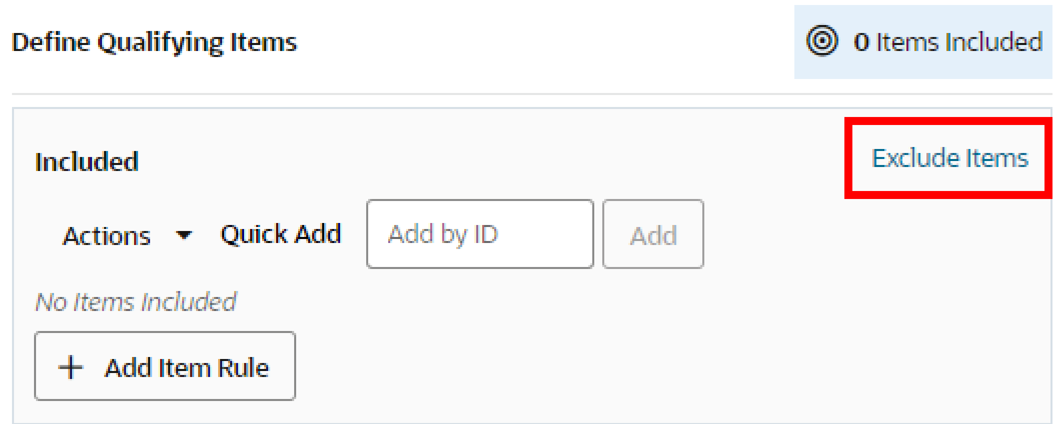
3. Select Items. You can select either:
   - All Items by selecting the **Item Description and ID** check box.
   - Specific Items by selecting the check box for each item you want to add to the Offer.

4. Click **OK** to add the item rule to the Offer or click **OK and Add Another** to add another attribute and values, or click **Cancel** to close the window without adding the item rule.

Exclude Items

From the Figure 7-21, click the **Exclude Items** link.

Figure 7-26 Exclude Items



Excluding Items follows the same processes as:

- Include All Items
- Include by Hierarchy
- Specific Items

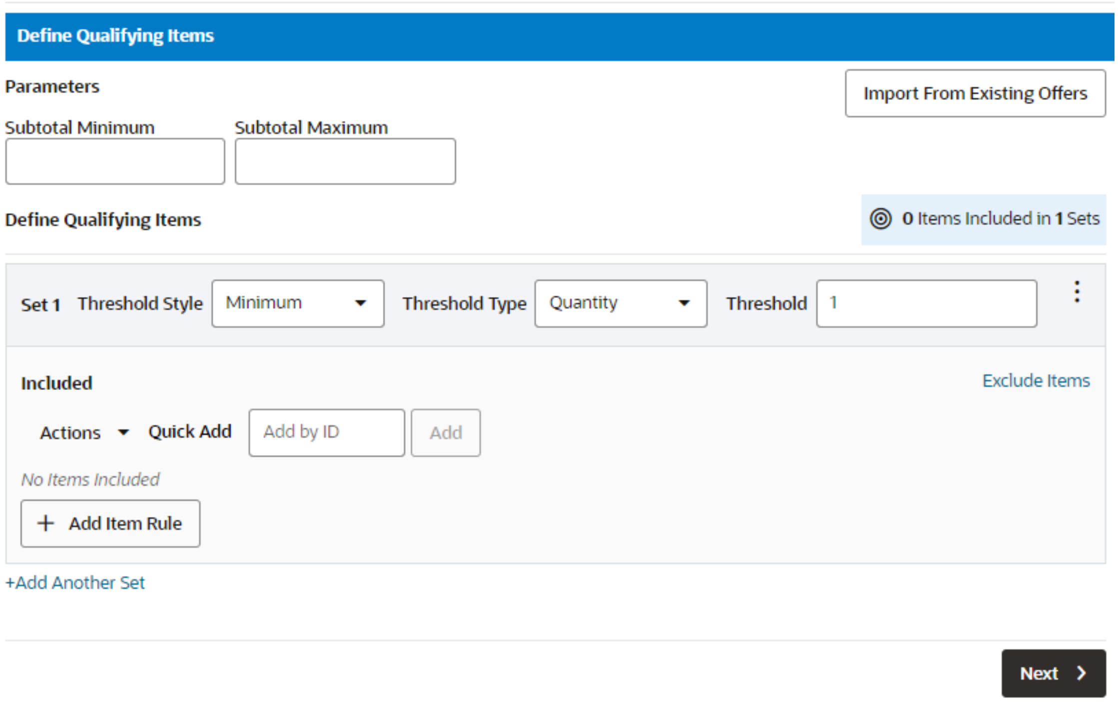
Define Qualifying Items for Offer Group 2

Follow the procedures in this section to update the Define Qualifying Items for Offer Group 2. Use this window to define which Items are included and excluded in the Offer.

Update the Figure 7-27 for these type of offers:

- Kit
- Buy X Get Y

Figure 7-27 Define Qualifying Items Window for Offer Group 2



Update the Parameters Pane for Group 2

The following parameters are dynamic and vary based on the type of offer selected.

- **Subtotal Minimum** – The minimum subtotal required for the transaction to be eligible for the discount.
- **Subtotal Maximum** The maximum subtotal required for the transaction to be eligible for the discount.
- **Threshold Style** – The style of threshold to be set.

> **Note:**
>
> The available options vary, depending upon the Offer Type selected.

  – Exact
  – Minimum
- **Threshold Type** – The type of threshold.
  – Amount
  – Quantity
- **Threshold (Required)** – The amount of the threshold

> **Note:**
>
> For KIT and BUY X Get Y offers, the Threshold Style, Threshold Type, and Threshold fields will appear in the Define Qualifying Items section. In these Offer Types, qualifying Items are organized in **Sets**. Each Set has an Include Item and Exclude Item section which contains one or more Items.

Import Items for Group 2

Import items into the Define Qualifying Items window by either:

- Import Items from Existing Offers
- Import Items from a CSV file

Import Items from Existing Offers

1. Click **Import From Existing Offers** then enter the following information:
   a. Enter some or all of the **Offer Name,** or **Offer Type** in the Search for Offer field. When searching by Offer ID the user must enter the **exact ID.**
   b. Click one or more of the **Import check boxes** for the Offers you would like to import.
   c. Click **OK** to import the Offer.

Import Items from a CSV file

There are two methods to import items in a CSV file, either:

- Use the Action Menu.
  1. Click the **Actions Menu** and select **Import from CSV**.
  2. **Drag and Drop the File**
  3. Click **OK**
- Use File Explorer.
  1. Click **Upload**. This displays the file selection menu where you can import a set of items in a comma-separated values (CSV) format.
  2. Select a file from File Explorer.
  3. Click **Open**.
  4. Click **OK**.

> **Note:**
>
> When the file has been uploaded, the name of the file displays a close icon **X** that allows you to remove the file.

Define Qualifying Items Pane for Group 2

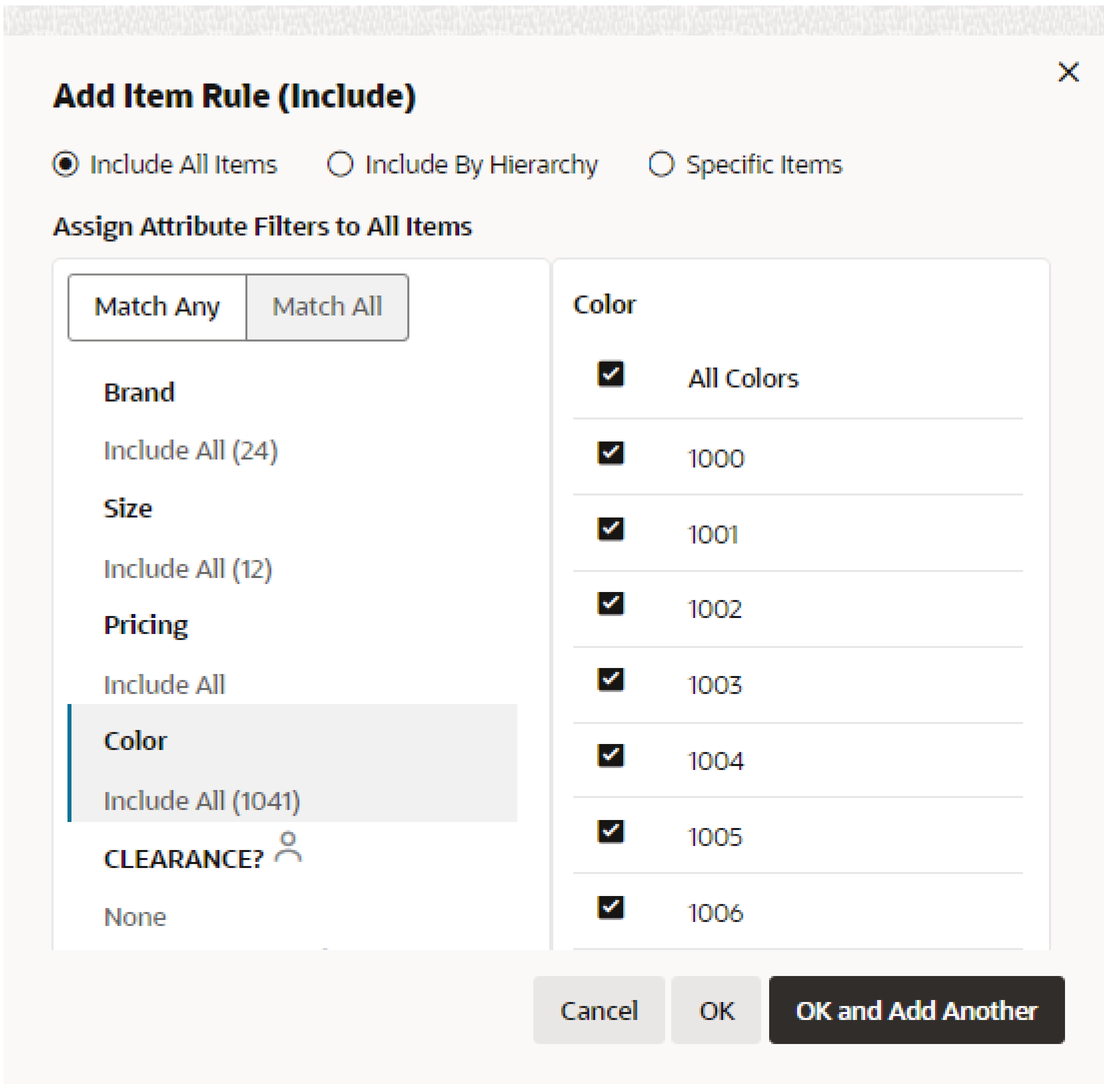
There are three methods to define Qualifying Items, either:

- Use the **Quick Add** option to enter a known **Item ID** which you wish to associate with this new Offer.

  Click **Add**.
- Click the **Actions Menu** and select **Add Item Rule**.
- Click **+Add Item Rule**.

The Figure 7-28 window opens.

Figure 7-28 Add Item Rule



You can Add Item Rules by selecting either:

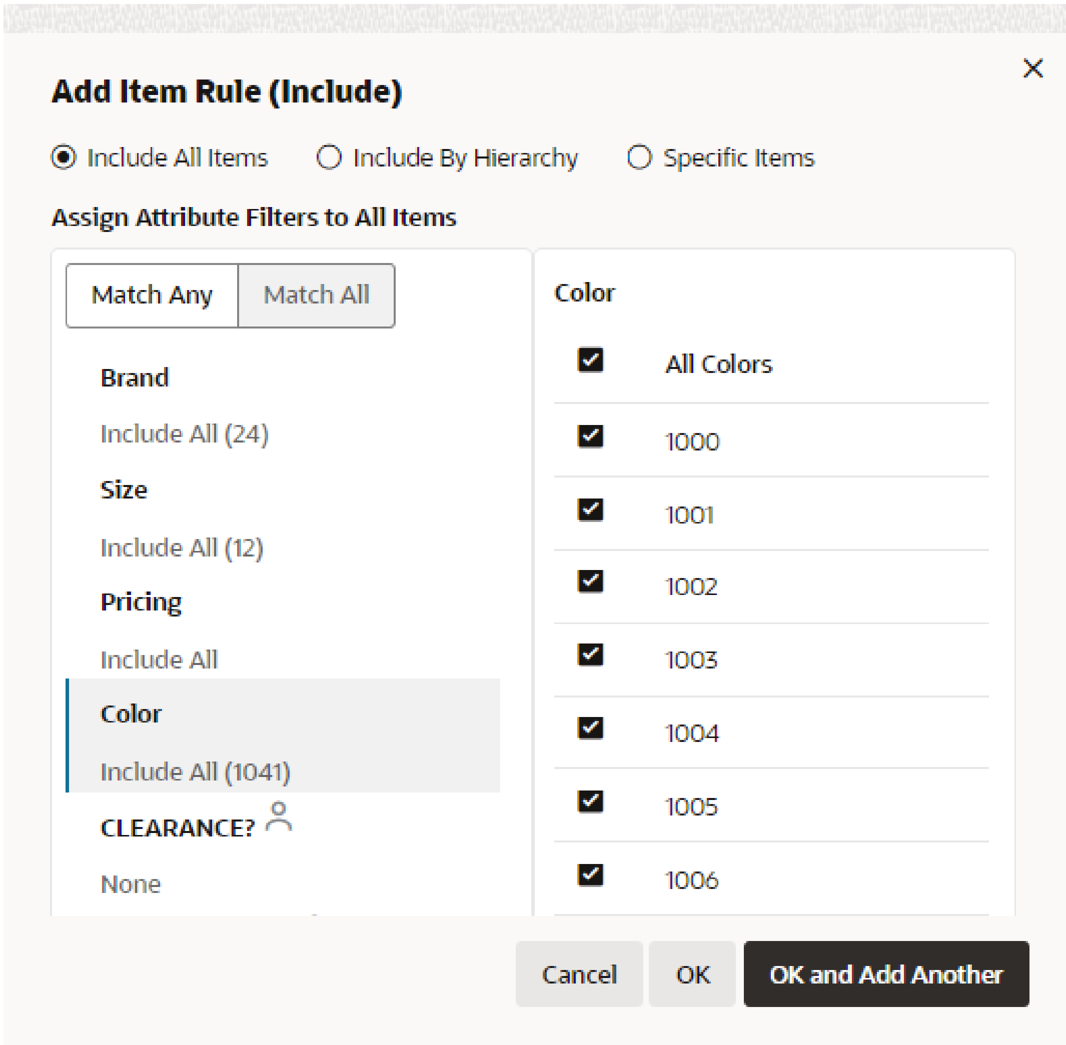
- Include All Items
- Include by Hierarchy
- Specific Items

Include All Items

Perform the following steps to add Item Rules by including all items

1. Select **Include All Items**. This enables you to use Attribute Filters for all items.

Figure 7-29 Add Item Rule (Include All Items)



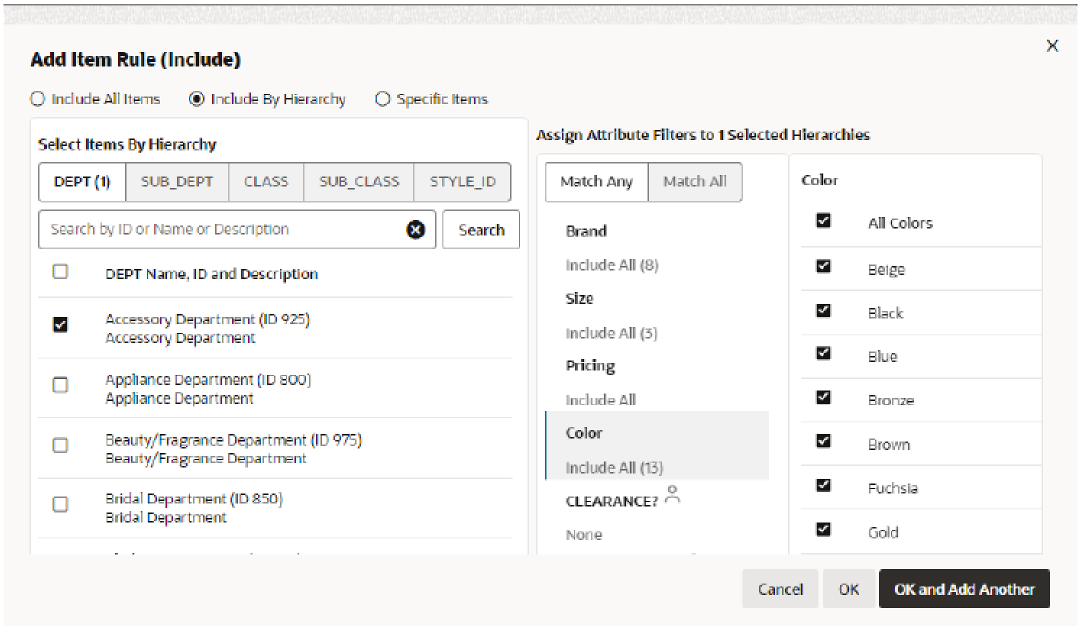
2. Click either **Match Any** or **Match All**.
3. In the left pane, select the desired attribute filter from the list of available choices Once selected, any associated values for the attribute appear in the right pane.
4. In the right pane, select or clear values of the selected attribute filter. Attributes like Season, Color, or Brand default to All selected. You can clear all values for that attribute by clearing the check mark in the top check box. Then you can sort through the list and choose specific value by selecting the associated check box.
5. Click **OK** to add the item rule to the Offer or click **OK and Add Another** to add another attribute and values. Click **Cancel** to close the window without adding the item rule.

Include by Hierarchy

Perform the following steps to add Item Rules by hierarchy.

1. Select **Include By Hierarchy**. The Figure 7-30 window opens.

Figure 7-30 Add Item Rule (Include by Hierarchy)



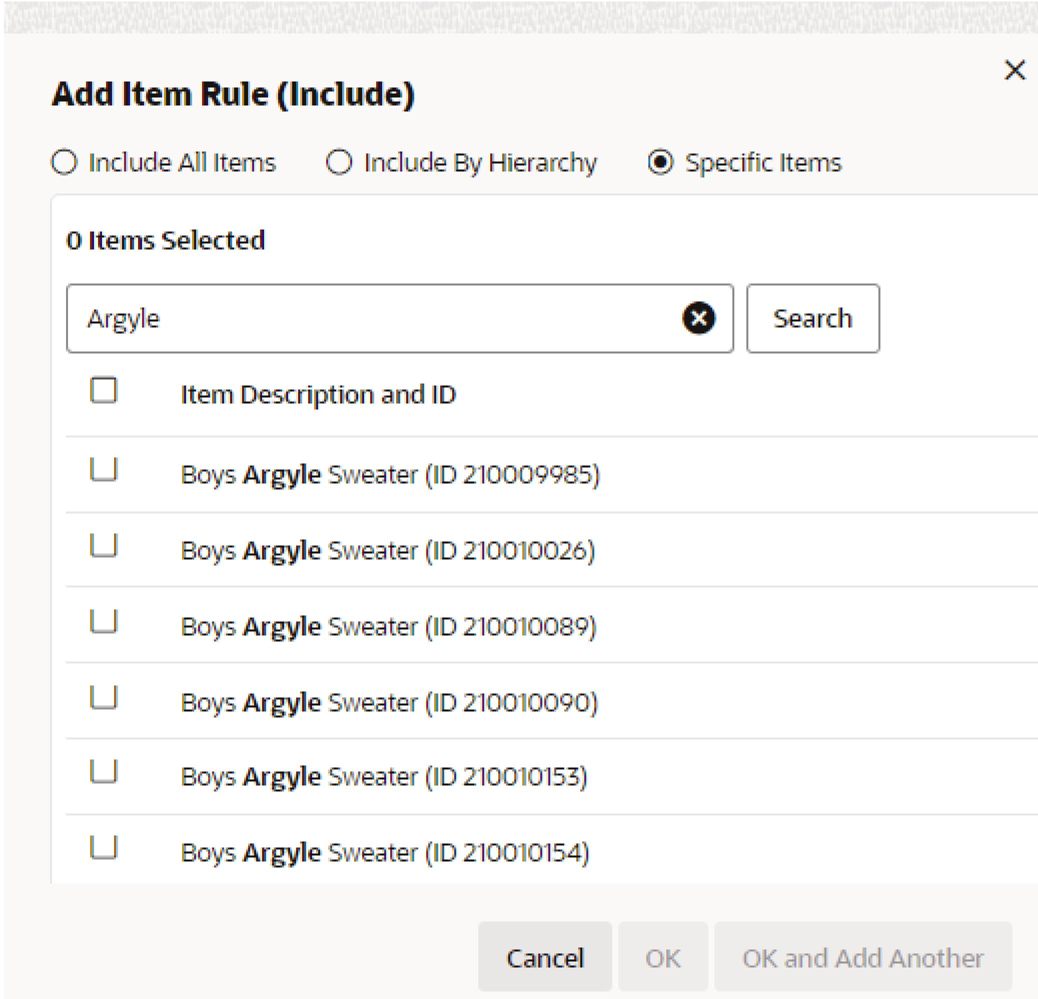
2. There are two ways to search for items in the Include by Hierarchy window, either for:
   - All items - select one of the **Hierarchy** tabs such as (**Department** or **Class**, and click **Search** to retrieve all associated items for the hierarchy.
   - Specific items - select the check box for each item you want to add to the Offer.
3. Select **Match Any** or **Match All**.
4. In the center pane, select the desired Attribute Filter from the available choices. Once selected, any associated values for the attribute appear in the right pane.
5. In the right pane, select or clear values of the selected attribute filter. Attributes like Season, Color, or Brand default to All selected. You can clear all values for that attribute by clearing the check mark in the top check box. Then you can sort through the list and choose specific values by selecting the associated check box.
6. Click **OK** to add the item rule to the Offer or click **OK and Add Another** to add another attribute and values. Click **Cancel** to close the window without adding the item rule.

Specific Items

Perform the following steps to include Item Rules by specific items.

1. Select **Specific Items**. The Figure 7-31 window opens.

Figure 7-31 Add Item Rule (Specific Items)



2. Search for Specific Items.

   In the Search box enter the **ID** or **Description** of the Item and click **Search**.A list of Items appear underneath the Search box.

3. Select Items. You can select either:

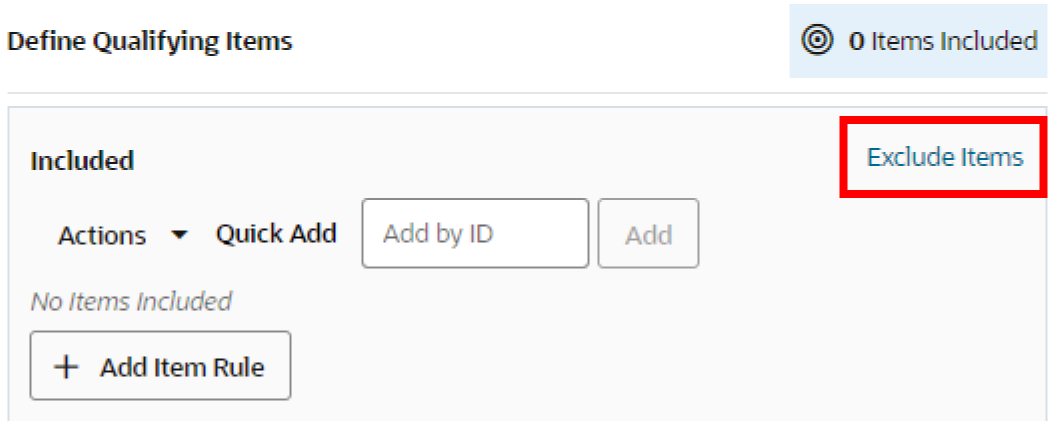
   - All Items by selecting the **Item Description and ID** check box.
   - Specific Items by selecting the check box for each item you want to add to the Offer.

4. Click **OK** to add the item rule to the Offer or click **OK and Add Another** to add another attribute and values, or click **Cancel** to close the window without adding the item rule.

Exclude Items

From the Figure 7-27 window, click the **Exclude Items** link.

Figure 7-32 Exclude Items



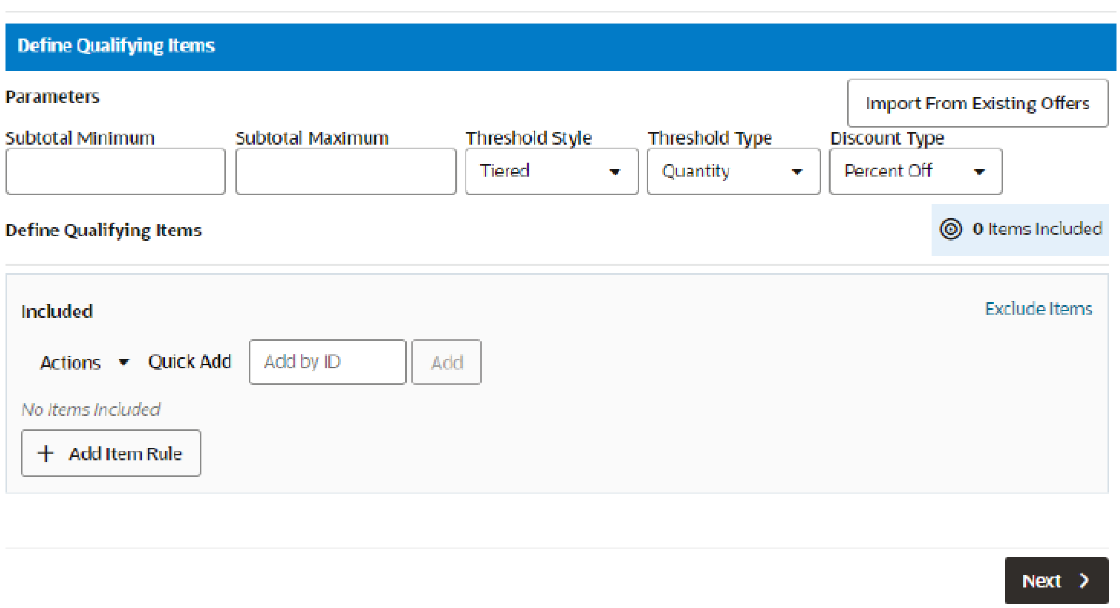
Excluding Items follows the same processes as:

- Include All Items
- Include by Hierarchy
- Specific Items

Define Qualifying Items for Offer Tiered Discount

Follow the procedures in this section to update the Figure 7-33. Use this window to define which Items are included and excluded in the Tiered Discount offer.

Figure 7-33 Define Qualifying Items Window for the Offer Tiered Discount



Update the Parameters Pane for Tiered Discount

The following parameters are dynamic and vary based on the type of offer selected.

- **Subtotal Minimum** – The minimum subtotal required for the transaction to be eligible for the discount.
- **Subtotal Maximum** The maximum subtotal required for the transaction to be eligible for the discount.
- **Threshold Style** – The style of threshold to be set.
  - Tiered
- **Threshold Type** – The type of threshold.
  - Amount
  - Quantity
- **Discount Type** – The type of discount.
  - **Percent Off** – The discount is a certain percentage off of the qualifying items. The Discount Value field determines the percentage.
  - **Amount Off** – The discount is a fixed amount off of the qualifying items. The Discount Value field determines the amount.
  - **Override Price** – The new price for the qualifying item. The Discount Value field determines the new price.

Import Items for Tiered Discount

Import items into the Define Qualifying Items window by either:

- Import Items from Existing Offers
- Import Items from a CSV file
- CSV File Format

Import Items from Existing Offers

1. Click **Import From Existing Offers** then enter the following information:
   a. Enter some or all of the **Offer Name,** or **Offer Type** in the Search for Offer field. When searching by Offer ID the user must enter the **exact ID.**
   b. Click one or more of the **Import check boxes** for the Offers you would like to import.
   c. Click **OK** to import the Offer.

Import Items from a CSV file

There are two methods to import items in a CSV file, either:

- Use the Action Menu.
  1. Click the **Actions Menu** and select **Import from CSV**.
  2. **Drag and Drop the File**
  3. Click **OK**
- Use File Explorer.
  1. Click **Upload**. This displays the file selection menu where you can import a set of items in a comma-separated values (CSV) format.
  2. Select a file from File Explorer.
  3. Click **Open**.

4. Click **OK**.

CSV File Format

When importing items into an Item Eligibility rule, the CSV file listing the items must have the following fields for each line.

- HIERARCHY LEVEL [required]
  - If the Hierarchy level is item, use the value _ITEM_ID_ for this field.
  - For a non-item Hierarchy level, use the value configured in System Configuration.

    For information about System Configuration and configuring the names of Hierarchy levels, see the *Oracle Retail customer Engagement Implementation Guide*.
- HIERARCHY VALUE [required]
- BRAND [optional]
- SEASON [optional]
- COLOR [optional]
- MIN PRICE [optional]
- MAX PRICE [optional]

Each line in the CSV file corresponds to on Hierarchy level being imported.

A placeholder must be used for all fields. For example, to include an item with and ID of 343, from the Acme brand, colored brown, with a minimum price of 13.50, with no season, and with no maximumn price, the following line would be included in the CSV file:

_ITEM_ID_,343,Acme,,brown,13.50,

Note the empty SEASON and MAX PRICE fields in the example.

> **Note:**
>
> When the file has been uploaded, the name of the file displays a close icon **X** that allows you to remove the file.

Define Qualifying Items Pane for Tiered Discount

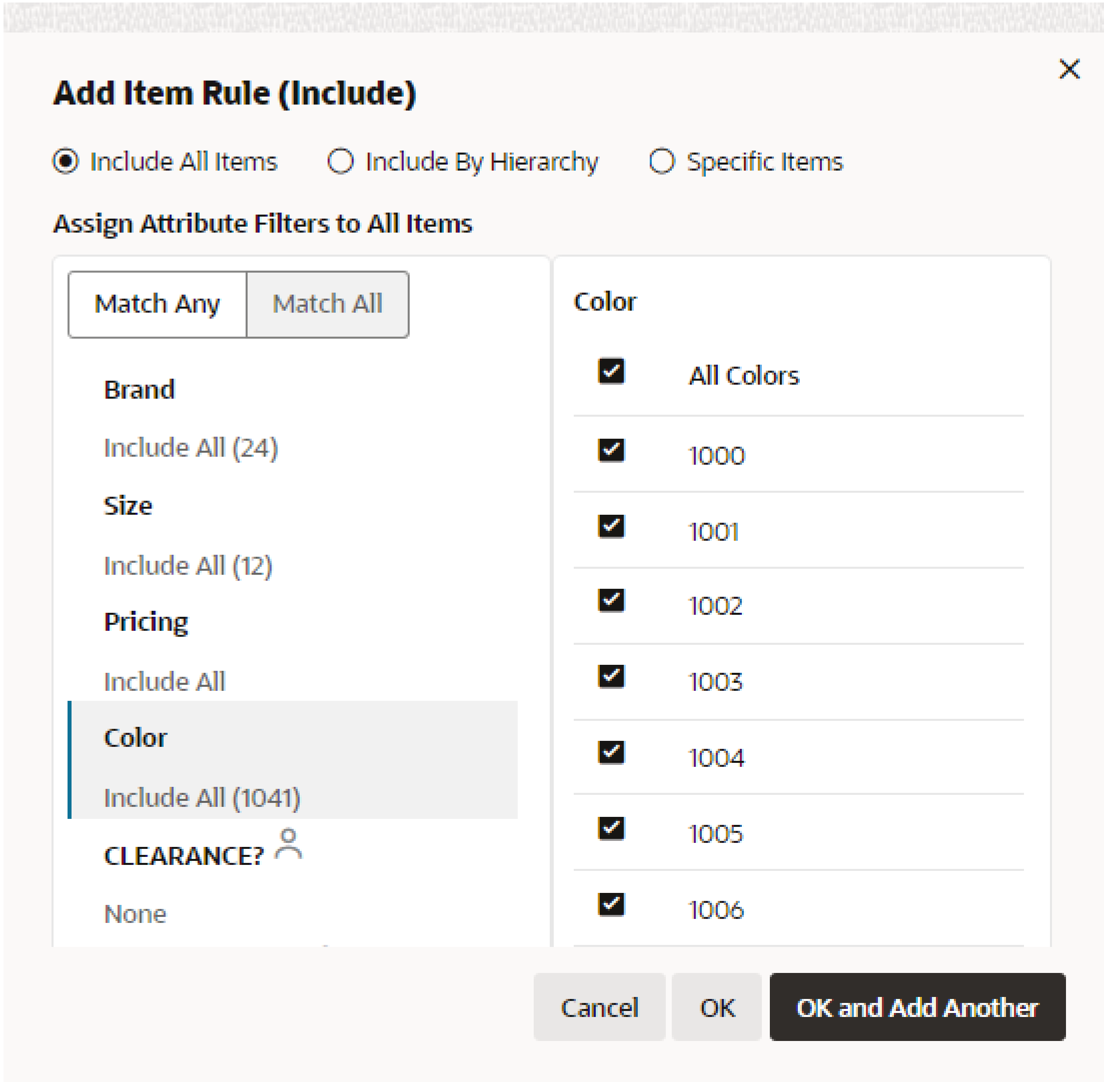
There are three methods to define Qualifying Items, either:

- Use the **Quick Add** option to enter a known **Item ID** which you wish to associate with this new Offer.

  Click **Add**.
- Click the **Actions Menu** and select **Add Item Rule**.
- Click **+Add Item Rule**.

The Figure 7-34 window opens.

Figure 7-34   Add Item Rule



You can Add Item Rules by selecting either:

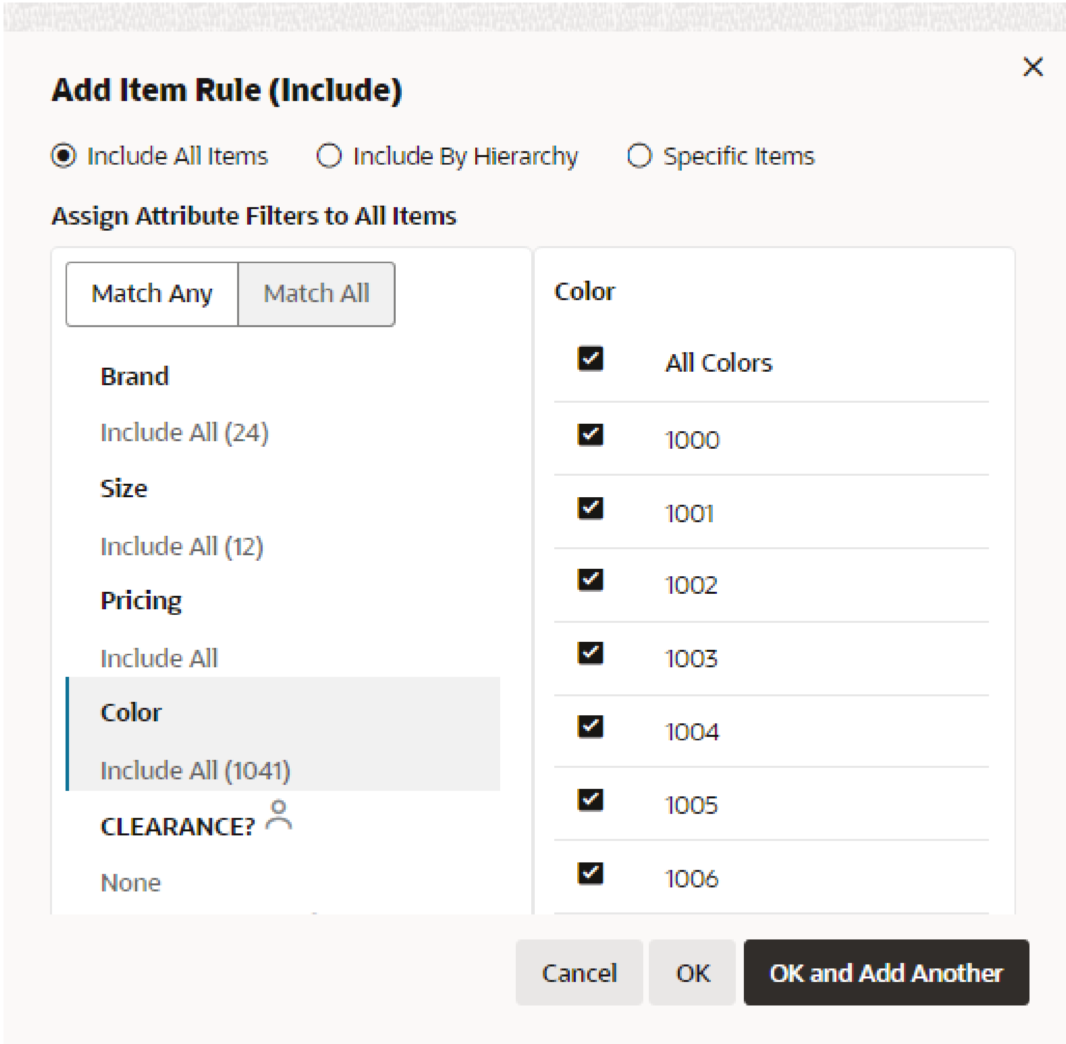
- Include All Items
- Include by Hierarchy
- Specific Items

Include All Items

Perform the following steps to add Item Rules by including all items

1. Select **Include All Items**. This enables you to use Attribute Filters for all items.

Figure 7-35 Add Item Rule (Include All Items)



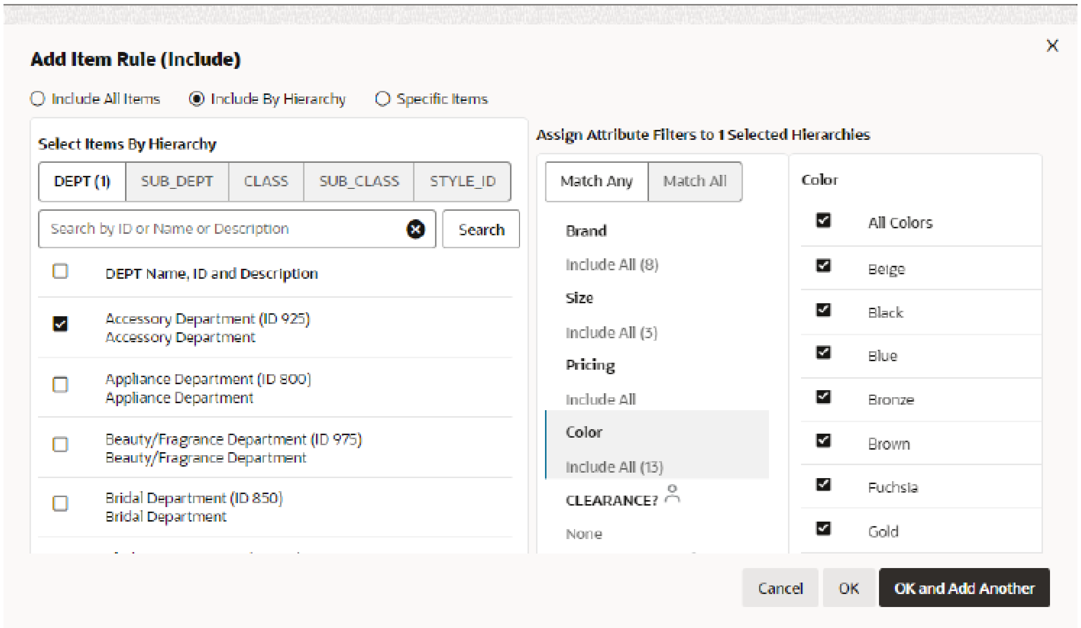
2. Click either **Match Any** or **Match All**.
3. In the left pane, select the desired attribute filter from the list of available choices Once selected, any associated values for the attribute appear in the right pane.
4. In the right pane, select or clear values of the selected attribute filter. Attributes like Season, Color, or Brand default to All selected. You can clear all values for that attribute by clearing the check mark in the top check box. Then you can sort through the list and choose specific value by selecting the associated check box.
5. Click **OK** to add the item rule to the Offer or click **OK and Add Another** to add another attribute and values. Click **Cancel** to close the window without adding the item rule.

Include by Hierarchy

Perform the following steps to add Item Rules by hierarchy.

1. Select **Include By Hierarchy**. The Figure 7-36 window opens.

Figure 7-36 Add Item Rule (Include by Hierarchy)



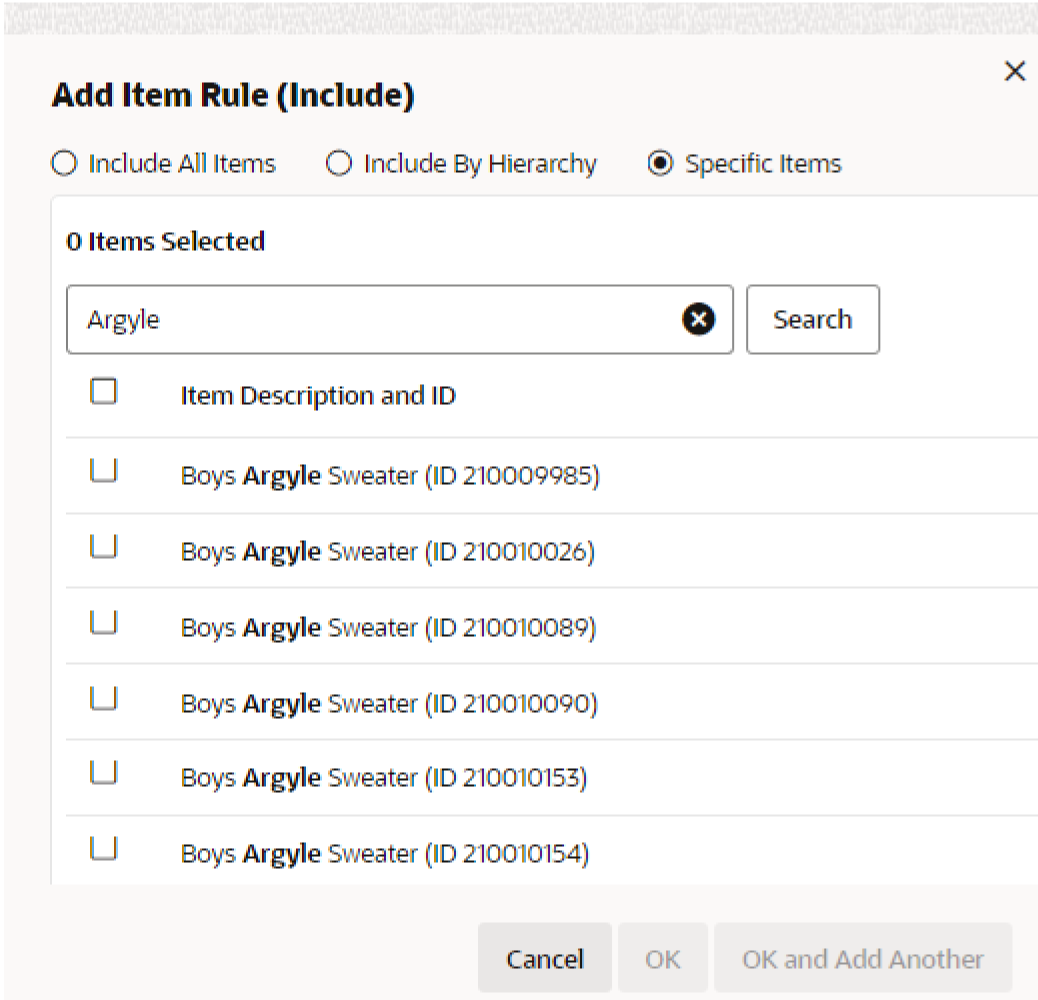
2. There are two ways to search for items in the Include by Hierarchy window, either for:
   - All items - select one of the **Hierarchy** tabs such as (**Department** or **Class**, and click **Search** to retrieve all associated items for the hierarchy.
   - Specific items **-** select the check box for each item you want to add to the Offer.
3. Select **Match Any** or **Match All**.
4. In the center pane, select the desired Attribute Filter from the available choices. Once selected, any associated values for the attribute appear in the right pane.
5. In the right pane, select or clear values of the selected attribute filter. Attributes like Season, Color, or Brand default to All selected. You can clear all values for that attribute by clearing the check mark in the top check box. Then you can sort through the list and choose specific values by selecting the associated check box.
6. Click **OK** to add the item rule to the Offer or click **OK and Add Another** to add another attribute and values. Click **Cancel** to close the window without adding the item rule.

Specific Items

Perform the following steps to include Item Rules by specific items.

1. Select **Specific Items**. The Figure 7-37 window opens.

Figure 7-37 Add Item Rule (Specific Items)



2. Search for Specific Items.

   In the Search box enter the **ID** or **Description** of the Item and click **Search**.A list of Items appear underneath the Search box.

3. Select Items. You can select either:

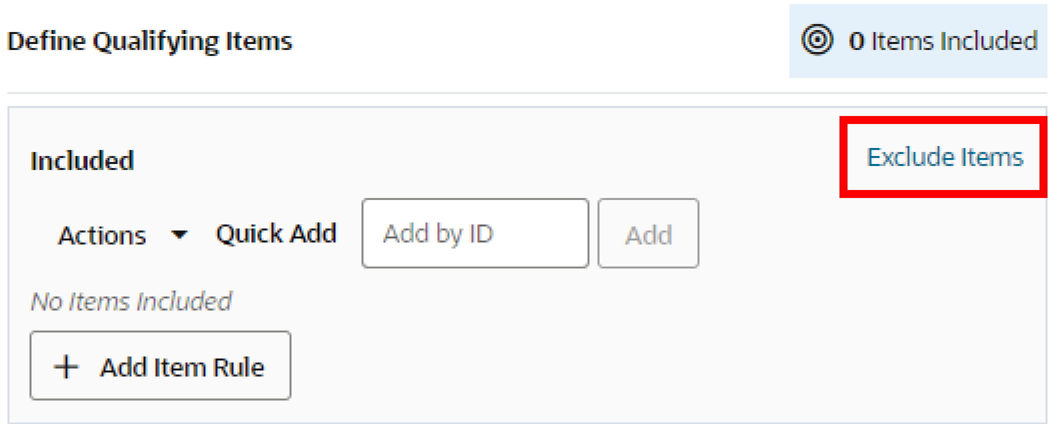
   - All Items by selecting the **Item Description and ID** check box.
   - Specific Items by selecting the check box for each item you want to add to the Offer.

4. Click **OK** to add the item rule to the Offer or click **OK and Add Another** to add another attribute and values, or click **Cancel** to close the window without adding the item rule.

Exclude Items

From the Figure 7-33, click the **Exclude Items** link.

Figure 7-38 Exclude Items



Excluding Items follows the same processes as:

- Include All Items
- Include by Hierarchy
- Specific Items

Update Award Items Tab

For Step 9 under the section Creating Offers update the Award Items tab and return to Step 10.

The Award Items tab defines which Items are included and excluded in the Offer, as well as to define the rules for the Award type and amount.

Table 7-6 Define Award Items by Offer Type

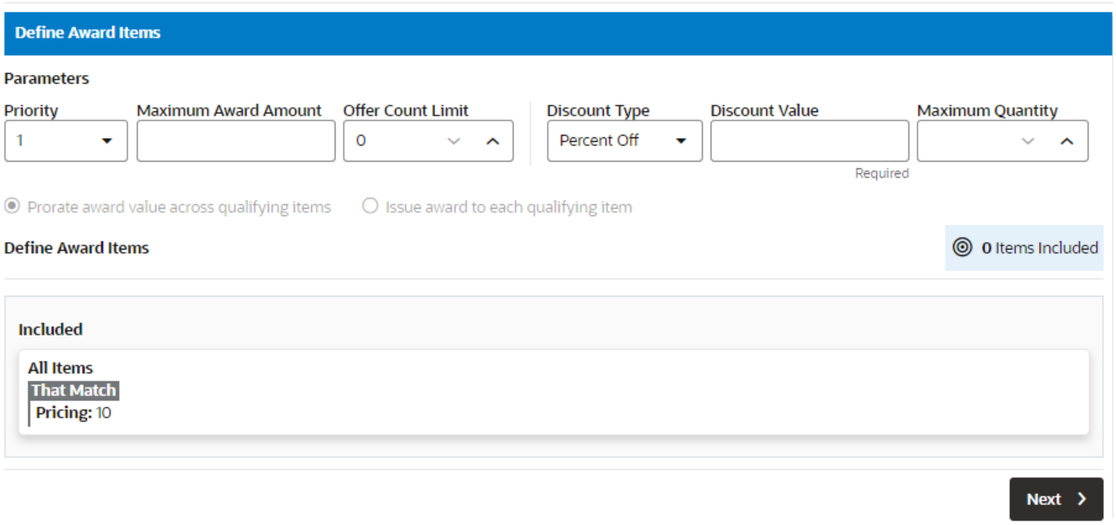
Offer Type	Define Award Items Section
Transaction Discount	Update Award Items for Group A
Line Item Discount	
Fixed Quantity/Price	Update Award Items for Fixed Quantity/Price
Gift with Purchase	Update Award Items for Gift with Purchase
Buy X Get X	Update Award Items for Buy X Get X
Buy X Get Points	Update Award Points for Buy X Get Points
Kit	Update Award Items for Offer Type Kit
Buy X Get Y	Update Award Items for Buy X Get Y
Tiered Discount	Define Tiered Discount

Update Award Items for Group A

The Figure 7-39 defines award items for these type offers:

- Transaction Discount
- Line Item Discount

Figure 7-39 Define Award Items Tab Group A



Update the Parameters Pane for Group A

The following parameters are dynamic and vary based on the type of offer selected.

- **Priority** – If more than one Offer can be applied to a Transaction, this selection menu determines the priority given to the Offer.
- **Maximum Award Amount** – The maximum currency amount of the award.
- **Offer Count Limit** – The maximum number of times the Offer can be applied to the same transaction. Available only if the Intended Use for the Offer is not Entitlement. Set to 0 (default) for no limit.
- **Discount Type** – The type of discount.
  - Percent Off – The discount is a certain percentage off of the qualifying items. The Discount Value field determines the percentage.
  - Amount Off – The discount is a fixed amount off of the qualifying items. The Discount Value field determines the amount.
- **Discount Value** – The amount of the discount.
- **Maximum Quantity** – Maximum quantity of the matching items that can be used to satisfy the item rule.
- **Award application method** – Determines how a discount is applied to the award Items. These options are only enabled for Amount Off discount types, and only if the Intended Use for the Offer is not Entitlement. This method has the following options:
  - Prorate award value across qualifying items - The amount of the discount is divided by the number of items and then that amount is applied to each Item.
  - Issue award to each qualifying items - The amount of the discount is applied to each Item.

Define Award Items for Group A

This pane lists Award items that were selected in Define Qualifying Items for Offer Group 1

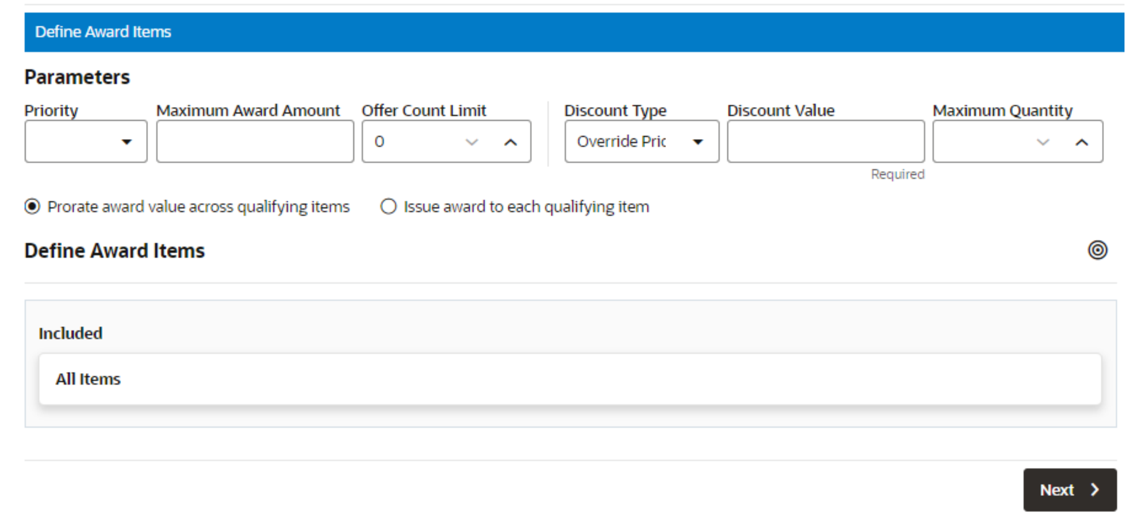
- **Included Items** - Lists the items that are included as Award Items.

- **Excluded Items** - Lists the items that are excluded as Award Items.

Update Award Items for Fixed Quantity/Price

The figure below defines award items when the offer type is Fixed Quantity/Price.

Figure 7-40 Define Award Items Tab for Fixed Quantity/Price



Update the Parameters or Fixed Quantity/Price

The following parameters are dynamic and vary based on the type of offer selected.

- **Priority** – If more than one Offer can be applied to a Transaction, this selection menu determines the priority given to the Offer.
- **Maximum Award Amount** – The maximum currency amount of the award.
- **Offer Count Limit** – The maximum number of times the Offer can be applied to the same transaction. Available only if the Intended Use for the Offer is not Entitlement. Set to 0 (default) for no limit.
- **Discount Type** – The type of discount.
  - Override Price – The new price for the qualifying item. The Discount Value field determines the new price.
- **Discount Value** – The award value that will be applied to the qualifying items.
- **Maximum Quantity** – The maximum quantity of the matching items that can be used to satisfy the item rule.
- **Award application method** – Determines how a discount is applied to the award Items. These options are only enabled for Amount Off discount types, and only if the Intended Use for the Offer is not Entitlement. This method has the following options:
  - Prorate award value across qualifying items - The discount value is divided by the threshold quantity and then that amount is applied to each item. Example: Buy 3 Soda 2 liters for 5.00. Each Soda 2 liter would be 1.66, 1.67, 1.67.

– Issue award to each qualifying items - The discount value is applied to each qualifying item when the threshold quantity is reached. Example: Buy 3 Soda 2 liters for 1.50 each. Each Soda 2 liter would be 1.50.

> **Note:**
>
> If the Intended Use for the Fixed Quantity/Price offer is Entitlement, the award application method is not available.

Define Award Items for Fixed Quantity/Price

This pane lists Award items that were selected in Define Qualifying Items for Offer Group 1

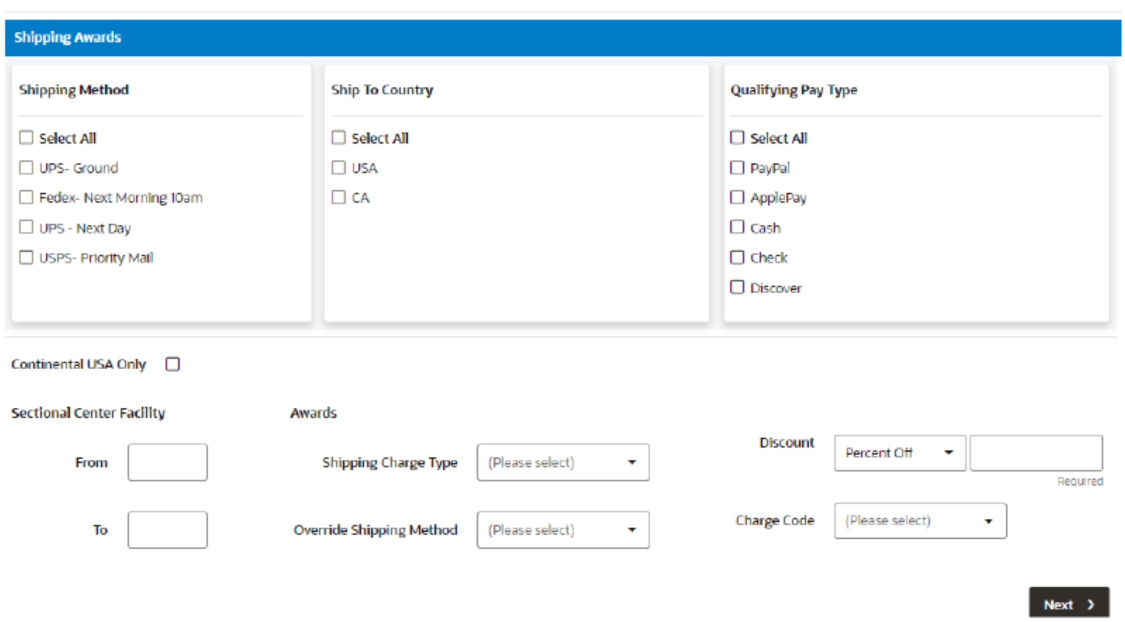
- **Included Items** - Lists the items that are included as Award Items.
- **Excluded Items** - Lists the items that are excluded as Award Items.

Update Award Items for Offer Type Kit

The Figure 7-41 defines award items when the offer type is Kit

- Kit

Figure 7-41 Define Award Items Tab for Offer Type Kit



Update the Parameters Pane for Offer Type Kit

The following parameters are dynamic and vary based on the type of offer selected.

- **Priority** – If more than one Offer can be applied to a Transaction, this selection menu determines the priority given to the Offer.

- **Maximum Award Amount** – The maximum currency amount of the award.
- **Offer Count Limit** – The maximum number of times the Offer can be applied to the same transaction. Available only if the Intended Use for the Offer is not Entitlement. Set to 0 (default) for no limit.

Define Award Items

Update the following items:

- **Discount Type** – From the list, select a type of discount, either:
  - Percent Off – The discount is a certain percentage off of the qualifying items. The Discount Value field determines the percentage.
  - Amount Off – The discount is a fixed amount off of the qualifying items. The Discount Value field determines the amount.
  - Override Price - The new price for the qualifying item. The Discount Value field determines the new price.
- **Discount Value** – Enter the amount of the discount.
- **Maximum Quantity** – Select the maximum quantity of the matching items that can be used to satisfy the item rule.
- **Award application method** – Determines how a discount is applied to the award Items.

  > **Note:**
  >
  > These options are only available when:
  >
  > - Amount Off is the discount type
  > - the Intended Use for the Offer is not Entitlement

  You can select from the following options:
  - **Prorate award value across qualifying items -** The amount of the discount is divided by the number of items and then that amount is applied to each Item.
  - **Issue award to each qualifying items** - The amount of the discount is applied to each Item.

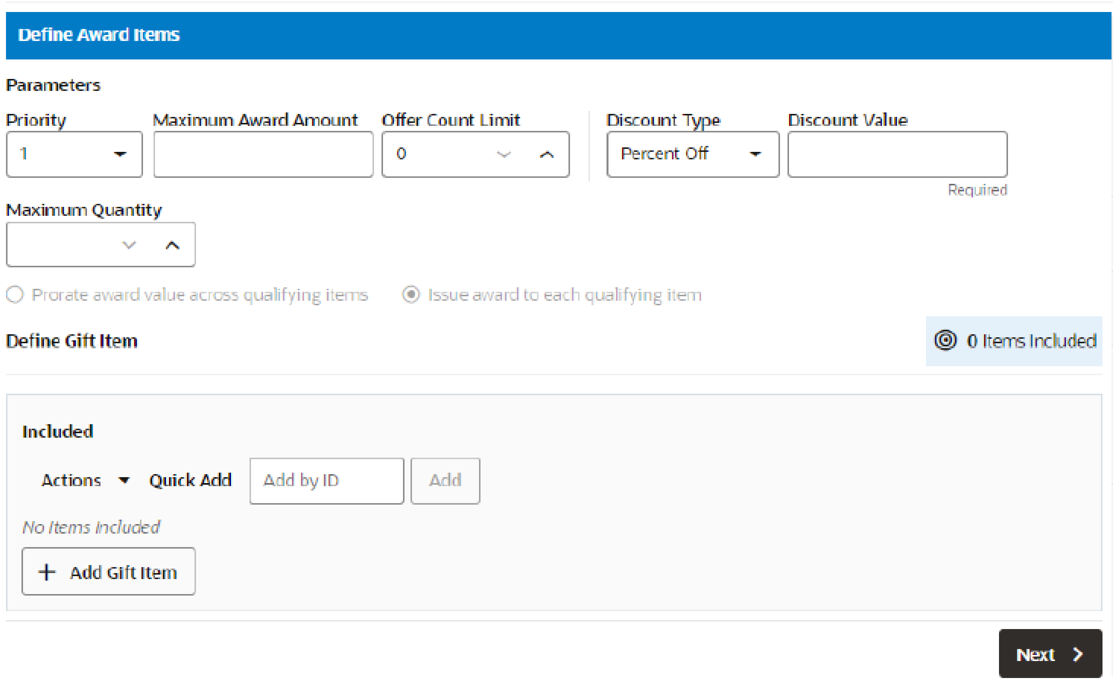
This pane lists Award items that were selected in Define Qualifying Items for Offer Group 2.

- **Included Items** - Lists the items that are included as Award Items.
- **Excluded Items** - Lists the items that are excluded as Award Items.

Update Award Items for Gift with Purchase

The Figure 7-42 defines award items when the offer type is Gift with Purchase.

Figure 7-42   Define Award Items Tab for Gift with Purchase



Update the Parameters Pane for Gift with Purchase

The following parameters are dynamic and vary based on the type of offer selected.

- **Priority** – If more than one Offer can be applied to a Transaction, this selection menu determines the priority given to the Offer.
- **Maximum Award Amount** – The maximum currency amount of the award.
- **Offer Count Limit** – The maximum number of times the Offer can be applied to the same transaction. Available only if the Intended Use for the Offer is not Entitlement. Set to 0 (default) for no limit.
- **Discount Type** – The type of discount.
  - Percent Off – The discount is a certain percentage off of the qualifying items. The Discount Value field determines the percentage.
  - Amount Off – The discount is a fixed amount off of the qualifying items. The Discount Value field determines the amount.
  - Override Price - The new price for the qualifying item. The Discount Value field determines the new price.
- **Discount Value** – The amount of the discount.
- **Maximum Quantity** – Maximum quantity of the matching items that can be used to satisfy the item rule.
- **Award application method** – Determines how a discount is applied to the award Items.

> **Note:**
>
> These options are only available when:
>
> – Amount Off is the discount type
>
> – the Intended Use for the Offer is not Entitlement

You can select from the following options:

– **Prorate award value across qualifying items -** The amount of the discount is divided by the number of items and then that amount is applied to each Item.

– **Issue award to each qualifying items -** The amount of the discount is applied to each Item.

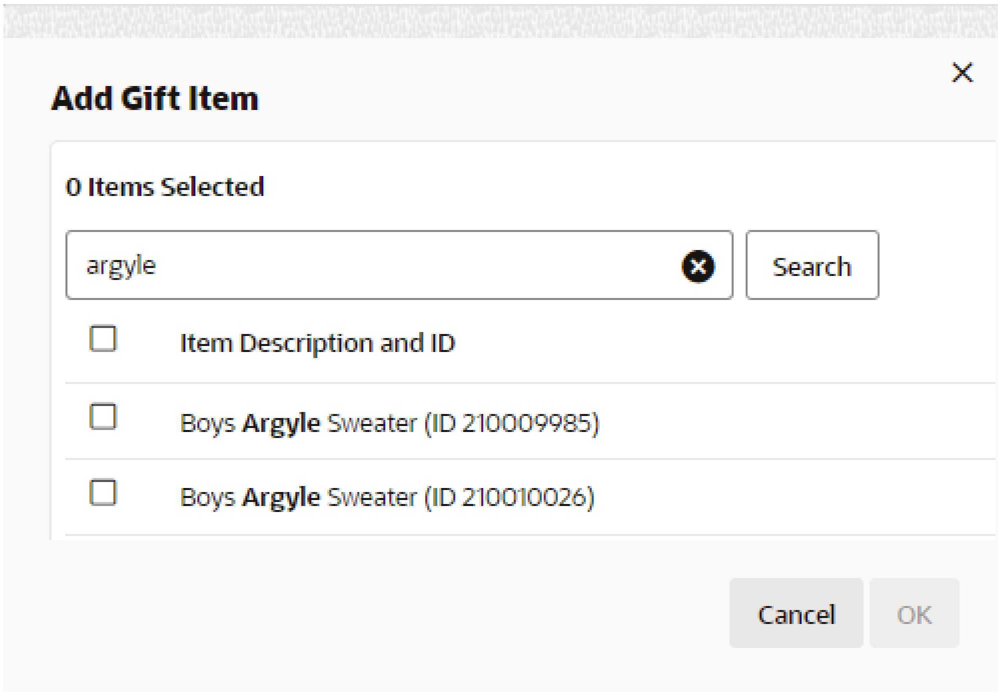
Adding Gift Items to an Offer

Perform the following steps to add Gift Items to an offer from the Figure 7-42 window.

1. Select a method from the Figure 7-42 window to add gift items.
   a. Enter the exact item ID in the **Quick Add** field and then click **Add**.
   b. Click **+ Add Gift Item** to open the Figure 7-43 window where you can search for items.
   c. Click the **Actions Menu** and then select **+Add Gift Item** to open the Figure 7-43 window.

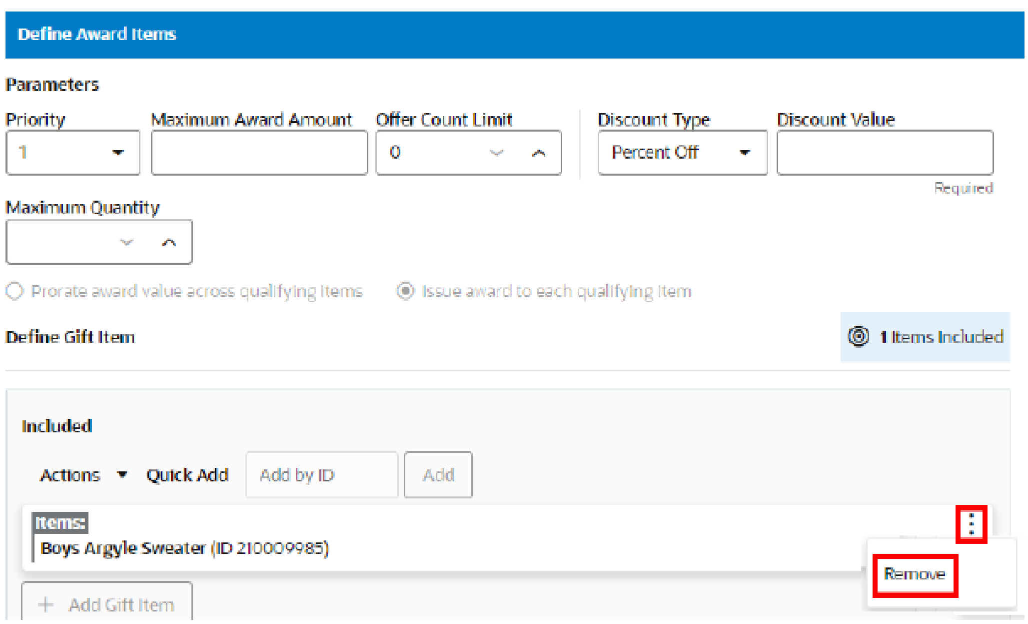
   > **Note:**
   >
   > You may only add one Gift Item to the offer.

Figure 7-43 Add Gift Item



2. Select one check box to the left of the individual item you wish to add to the Offer.
   a. **Optional:** Click the **Overflow Menu**, then click **Remove** to remove a Gift Item and search for a different Gift Item.

Figure 7-44 Included Gift Item Overflow Menu (Remove)

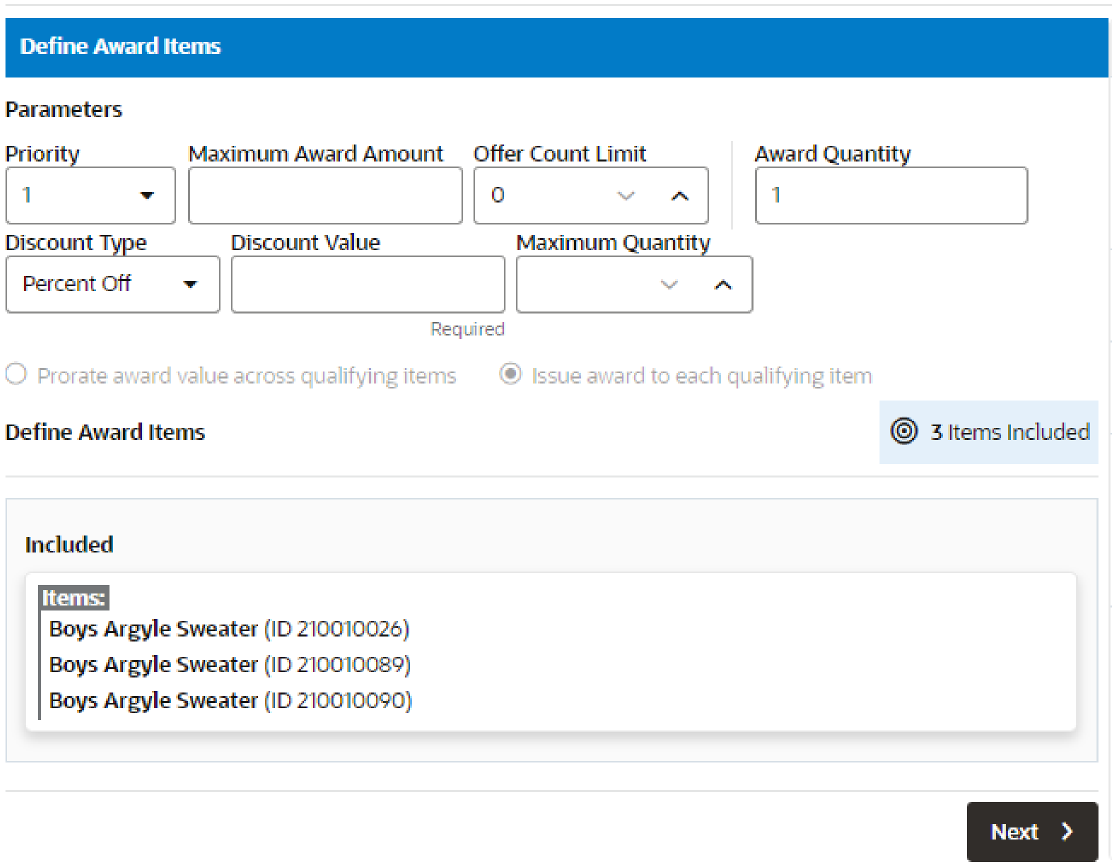


3. Click **OK** to add the Gift Item to the Offer, or click **Cancel** to close the window without saving.

Update Award Items for Buy X Get X

The Figure 7-45 defines award items when the offer type is Buy X Get X

Figure 7-45 Define Award Items Tab Buy X Get X



Update the Parameters Pane for Buy X Get X

The following parameters are dynamic and vary based on the type of offer selected.

- **Priority** – If more than one Offer can be applied to a Transaction, this selection menu determines the priority given to the Offer.
- **Maximum Award Amount** – The maximum currency amount of the award.
- **Offer Count Limit** – The maximum number of times the Offer can be applied to the same transaction. Available only if the Intended Use for the Offer is not Entitlement. Set to 0 (default) for no limit.
- **Discount Type** – The type of discount.
  - Percent Off – The discount is a certain percentage off of the qualifying items. The Discount Value field determines the percentage.
  - Amount Off – The discount is a fixed amount off of the qualifying items. The Discount Value field determines the amount.

- Override Price - The new price for the qualifying item. The Discount Value field determines the new price.

- **Discount Value** – The amount of the discount.
- **Maximum Quantity** – Maximum quantity of the matching items that can be used to satisfy the item rule.
- **Award application method** – Determines how a discount is applied to the award Items.

> **Note:**
>
> These options are only available when:
>
> - Amount Off is the discount type
> - the Intended Use for the Offer is not Entitlement

You can select from the following options:

- **Prorate award value across qualifying items -** The amount of the discount is divided by the number of items and then that amount is applied to each Item.
- **Issue award to each qualifying items -** The amount of the discount is applied to each Item.

Define Award Items

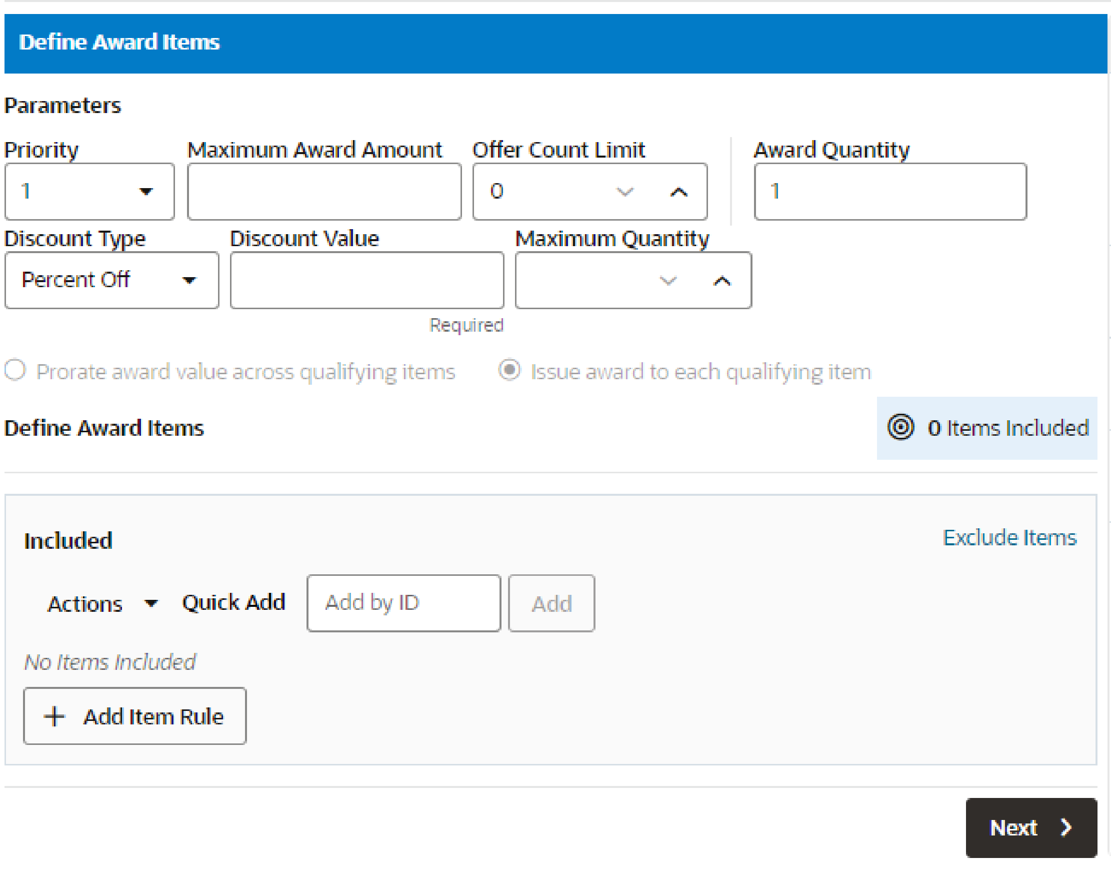
This pane lists Award items that were selected in Define Qualifying Items for Offer Group 1.

- **Included Items -** Lists the items that are included as Award Items.
- **Excluded Items -** Lists the items that are excluded as Award Items.

Update Award Items for Buy X Get Y

The Figure 7-46 defines award items when the offer type is Buy X Get Y.

Figure 7-46 Define Award Items Tab for Buy X Get Y



Update the Parameters Pane for Buy X Get Y

The following parameters are dynamic and vary based on the type of offer selected.

- **Priority** – If more than one Offer can be applied to a Transaction, this selection menu determines the priority given to the Offer.
- **Maximum Award Amount** – The maximum currency amount of the award.
- **Offer Count Limit** – The maximum number of times the Offer can be applied to the same transaction. Available only if the Intended Use for the Offer is not Entitlement. Set to 0 (default) for no limit.
- **Discount Type** – The type of discount.
  - Percent Off – The discount is a certain percentage off of the qualifying items. The Discount Value field determines the percentage.
  - Amount Off – The discount is a fixed amount off of the qualifying items. The Discount Value field determines the amount.
  - Override Price - The new price for the qualifying item. The Discount Value field determines the new price.
- **Discount Value** – The amount of the discount.
- **Maximum Quantity** – Maximum quantity of the matching items that can be used to satisfy the item rule.

- **Award application method** – Determines how a discount is applied to the award Items.

> **Note:**
>
> These options are only available when:
>
> – Amount Off is the discount type
>
> – the Intended Use for the Offer is not Entitlement

You can select from the following options:

– **Prorate award value across qualifying items -** The amount of the discount is divided by the number of items and then that amount is applied to each Item.

– **Issue award to each qualifying items -** The amount of the discount is applied to each Item.

Define Award Items

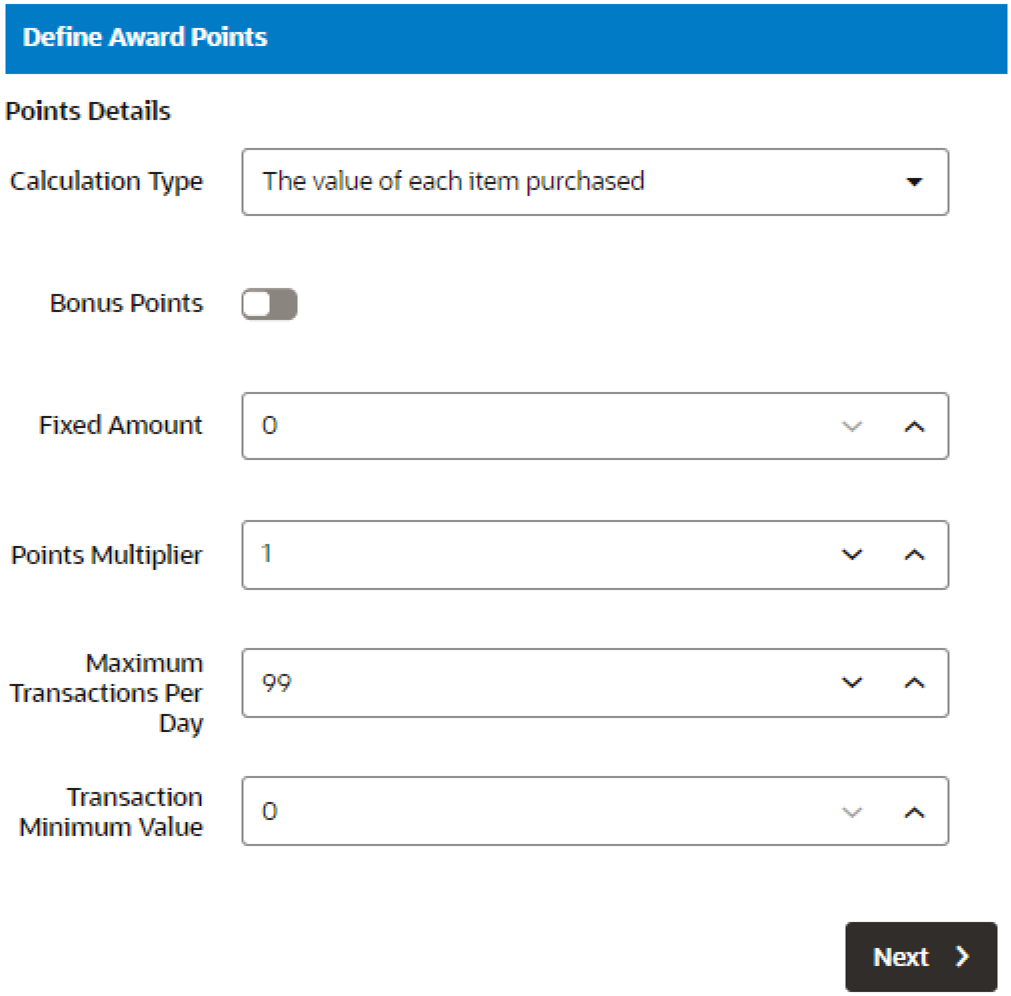
This pane lists Award items that were selected in Define Qualifying Items for Offer Group 2.

- **Included Items -** Lists the items that are included as Award Items.
- **Excluded Items -** Lists the items that are excluded as Award Items.

Update Award Points for Buy X Get Points

The Figure 7-47 defines award points when the offer type is Buy X Get Points or Marketing Engagements.

Figure 7-47 Define Award Points Tab for Buy X Get Points



Define Award Points Buy X Get Points

The Award Points tab defines the points in the Offer, as well as to define the rules for the Calculation type and amounts.

Perform the following steps.

1. Update the items in the Points Detail pane.
   - Select the **Calculation Type**. Values include:
     - The value of each item purchased - The sale amount of each item purchased in the transaction.
     - The quantity of each item purchased - The quantity of each item purchased in the transaction.
     - The number of qualifying transactions - The number of qualifying transactions made by the Customer.
   - **Bonus Points** - Indicates whether this Issue Rule stipulates that the Loyalty Program issues points as Bonus Points. Toggle the switch to activate.

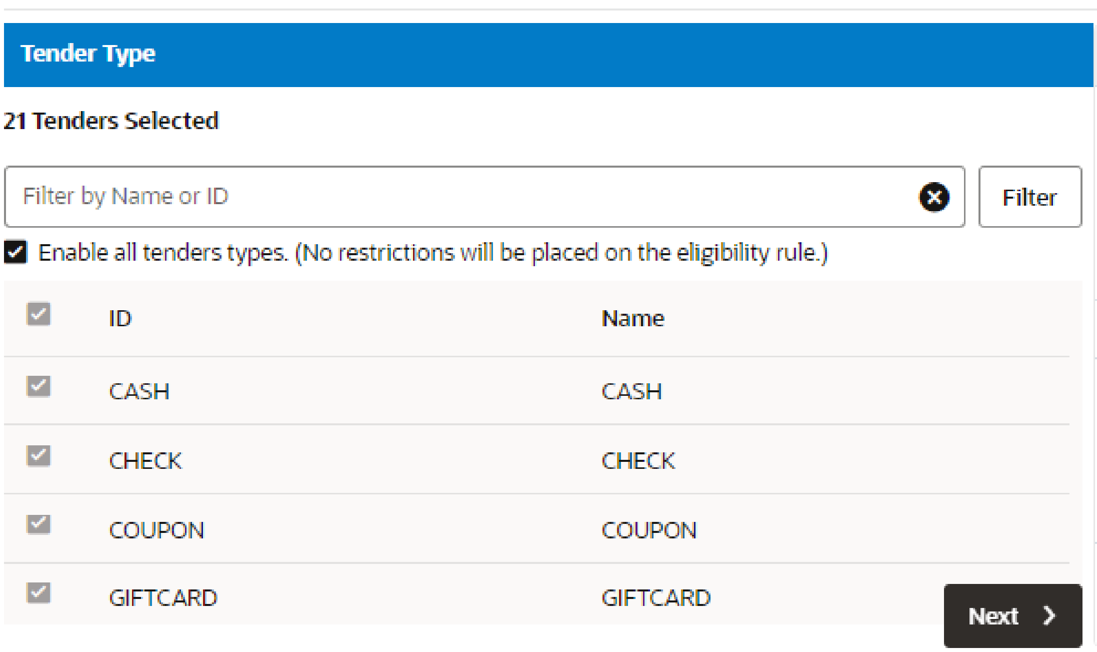
- **Fixed Amount** - The Fixed Amount, if any, assigned to each transaction.
- **Points Multiplier** - The number multiplied by the value indicated in the Calculation Type field. This field is active when the selected Calculation Type is either **The value of each item purchased** or **The quantity of each item purchased**.
- **Maximum Transactions Per Day** - The maximum number of sales transactions in a single day that will be used to calculate Loyalty points.
- **Transaction Minimum Value** - Minimum amount of a transaction for it to be applied to a Loyalty account.

2. When finished entering parameters for the Award Points, click **Next** to continue to Define Tender Type for Buy X Get Points.

Define Tender Type for Buy X Get Points

Tender eligibility rules determine whether a Customer Engagement element is enabled for a transaction, depending upon the tender used in a transaction.

Figure 7-48 Tender Type



Perform the following steps.

1. At the top of the window, in the Filter box enter filter criteria such as Name or ID. A list of tender types matching the filter criteria displays. Select one or more tender types to activate eligibility for this Issue rule.

   > **Note:**
   >
   > Select the **Enable all tender types** check box to indicate that all tenders are eligible for the Issue rule.

> **Note:**
>
> If a customer uses a tender that is unchecked, that transaction will not qualify for points issued by the Issue rule.

2. When finished selecting Tender Types, click **Next**. Continue to the Buy X Get Points Review tab.

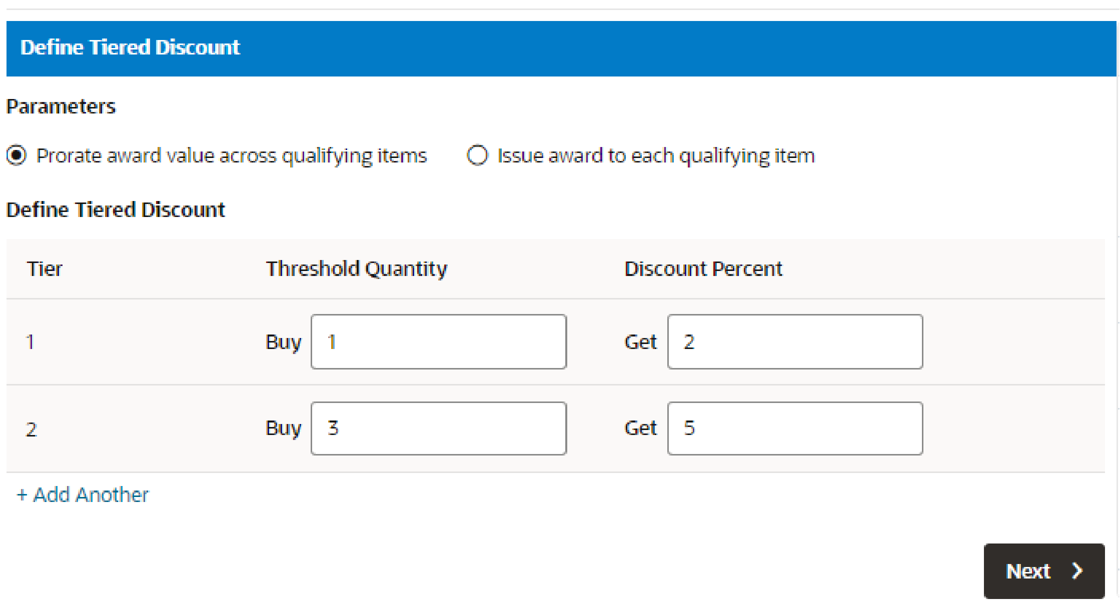
Define Tiered Discount

When the offer type is Tiered Discount, use the Figure 7-49 window.

A discount is applied to a defined set of items, where the amount or percent of the discount depends on the quantity or amount of the items defined in the threshold.

> **Note:**
>
> At least two tiers must be defined for Tiered Discount Offer.

Figure 7-49 Define Tiered Discount



Perform the following steps to update the Figure 7-49 window

1. Enter the following information.

   Parameters

   - Prorate award value across qualifying items - The amount of the discount is divided by the number of items and then that amount is applied to each Item.
   - Issue award to each qualifying items - The amount of the discount is applied to each Item.

For each Tier, enter the following information:

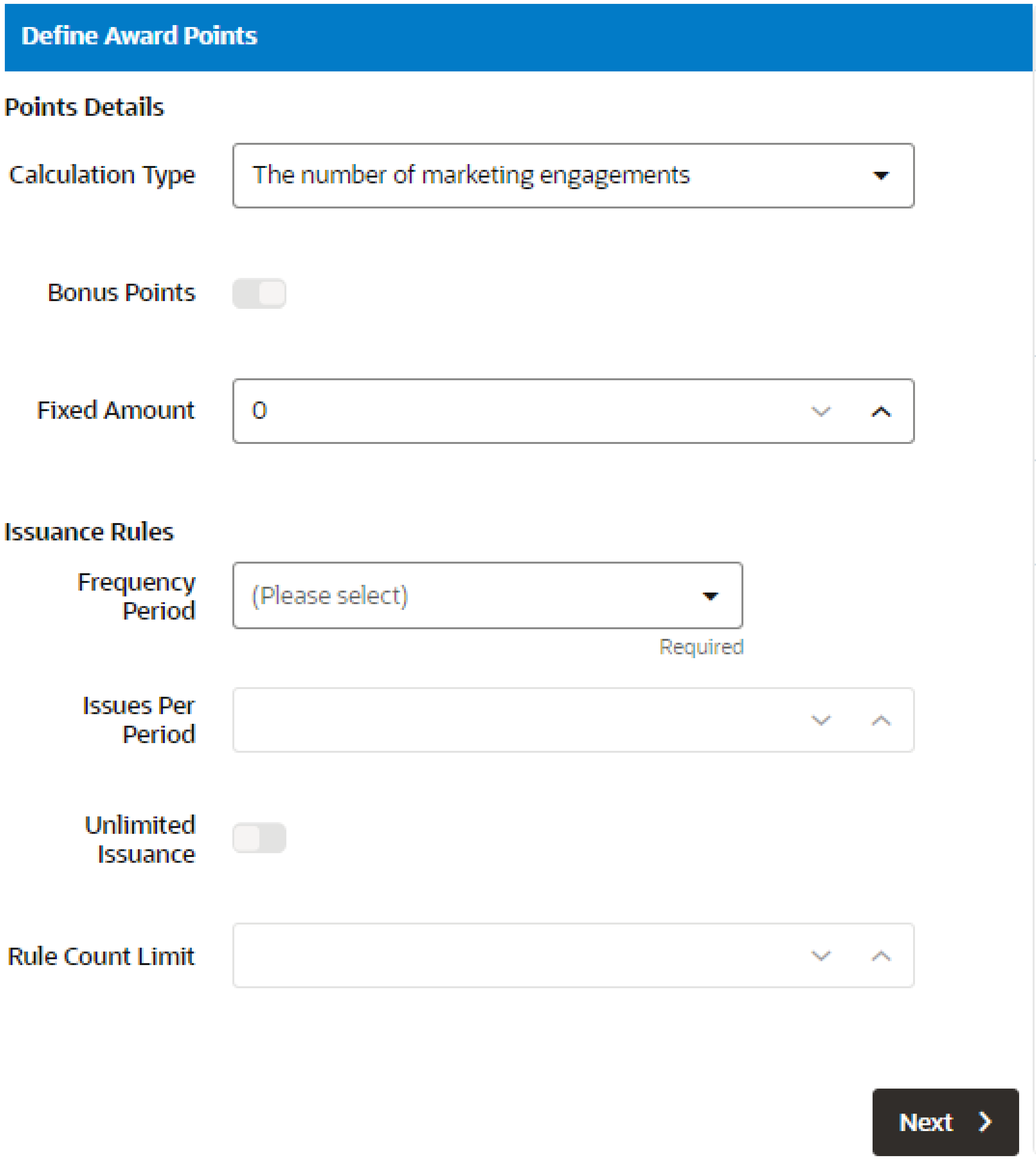
- **Buy** - The quantity threshold that must be met or exceeded to qualify for the Tier-level discount.
- **Get** - The discount applied to the Items in the Buy field. This field is only displayed when the discount type previously selected is Percent Off or Amount Off.
- **For** - The price applied to the items in the Buy field. This field is only displayed if the discount type previously selected is Price Override.

2. Click **+ Add Another** to add another tier or click the **Remove Tier** icon to remove a tier from the offer.
3. When finished defining Tiered Discounts for the Offer, click **Next** and advance to the Tiered Discount Review tab.

Updating Award Points for Marketing Engagements

The Figure 7-50 defines the points in the Offer, as well as to define the rules for the Calculation type and amounts.

Figure 7-50 Award Points Tab for Offer Type Marketing Engagements



Perform the following steps to update the Figure 7-50 window.

1. Enter the following for the **Award Points** tab.

   Points Details

   - **Calculation Type: The number of marketing engagements** - The number of times the customer interacts with marketing media, such as watching a video online. (default).
   - **Bonus Points** - Indicates whether this Issue Rule stipulates that the Loyalty Program issues points as Bonus Points (inactive).
   - **Fixed Amount** - The Fixed Amount, if any, assigned to each transaction.

   Issuance Rules

- **Frequency Period** - This field determines the time period used to control the frequency with which a Customer can earn points through marketing engagements. Options include:
  - One time only
  - Daily
  - Weekly
  - Monthly
  - Yearly
- **Issues Per Period** - The number of times a Customer can earn points through marketing engagements during the Frequency Period. Set to 1 if the Frequency Period is One-time only
- **Unlimited Issuance** - Determines whether points can be issued an unlimited number of times during the Frequency Period. Cleared if the Frequency Period is set to One-time only.
- **Rule Count Limit** - The total number of times a Customer can earn points through marketing engagements. Set to 1 if the Frequency Period is One-time only

2. When finished defining Awards Points, click **Next**. Continue to the Marketing Engagements Review tab.

Update Shipping Awards Tab

For Step 10 under the section Creating Offers update the Shipping Awards tab and return to Step 11.

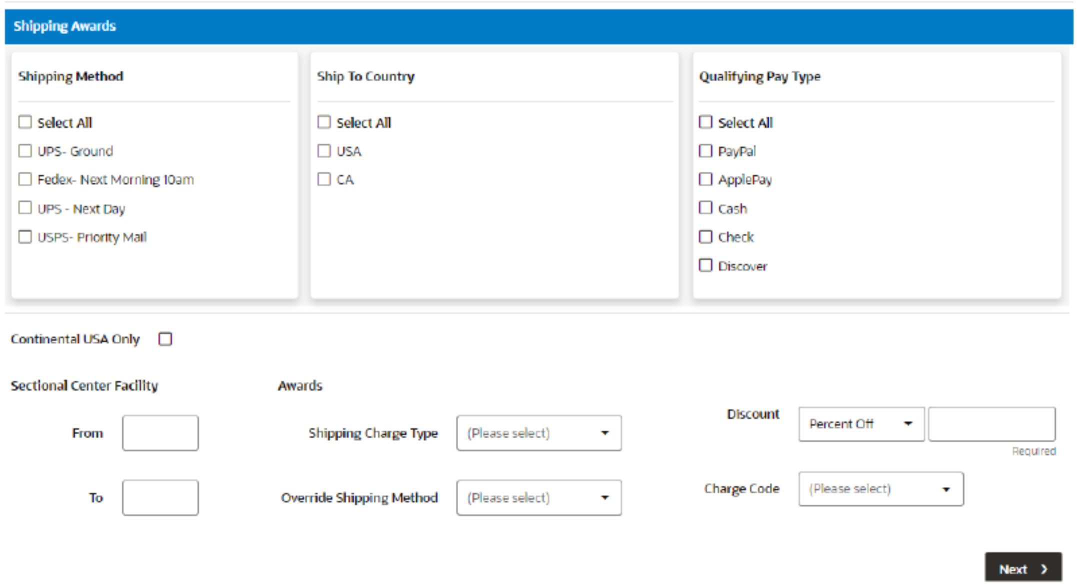
Update the Figure 7-51 when the offer type is:

- Transaction Discount
- Line Item Discount
- Fixed Quantity/Price
- Gift with Purchase
- Buy X Get X
- Kit
- Buy X Get Y

Perform the following steps to update the Figure 7-51.

1. Enter the following information for the **Shipping Awards** tab.

Figure 7-51 Shipping Awards Tab



- **Shipping Method** – This table lists the shipping methods that will qualify the shipping award. Select the shipping methods eligible for the Offer (Optional).
- **Ship To Country** – This table specifies the countries which make eligible the shipping award on the Offer. Select the Ship to Countries for the Offer (Optional).
- **Qualifying Pay Type** – This table lists the payment types required on the transaction to qualify for the shipping award. Select the Pay Types for the Offer (Optional).
- **Continental US Only** – If the Continental USA Only check box is checked, the Offer applies only to states in the continental USA (excluding Hawaii and Alaska).
- **Sectional Center Facility From** – This represents the first three positions of the postal code, for the sectional center facility. This will be the starting point of the range of postal code the shipment destination must fall under to qualify for the Shipping award (Optional).
- **Sectional Center Facility To** – This represents the first three positions of the postal code, for the sectional center facility. This will be the ending point of the range of postal code the shipment destination must fall under to qualify for the Shipping award (Optional).
- When finished defining the Shipping Award rules for the Offer, click Next.

Awards

- **Shipping Charge Type** – Customer defined Charge Types that qualify for the shipping award discount, such as, Base or Upgrade.
- **Override Shipping Method** – If a Shipping Method was defined, selecting this check box dictates overriding that shipping method for this new method. These codes are defined in a Configuration called Shipping Method Codes.
- **Discount** – Select the type of shipping discount to apply.
  - **Percent Off** – Apply a percentage discount, specified in the Discount Value, to the shipping charge. For example, 40% off shipping.

- **Amount Off** – Apply a discount amount, specified in the Discount Value, to the shipping charge. For example, $5.00 off shipping.
- **Override Price** – Override the shipping price to the Discount Value. For example, $2.99 shipping.

- **Charge Code** – Select from the list to select a code that will appear on the order when using the Amount off or Percent Off (Optional).

2. Continue with the Review tab by offer type in the section, Using the Review Tab.

Using the Review Tab

For Step 11 under the section Creating Offers check the Review tab for your offer.

The Review tab displays key elements in the Offer Setup.

The following sections describe the review process for each type of offers.

- Transaction Discount Review
- Line Item Discount Review
- Fixed Quantity/Price Review
- Gift with Purchase Review
- Buy X Get X Review
- Buy X Get Points Review
- Kit Review
- Buy X Get Y Review
- Tiered Discount Review
- Marketing Engagements Review
- Bounceback Trigger Review

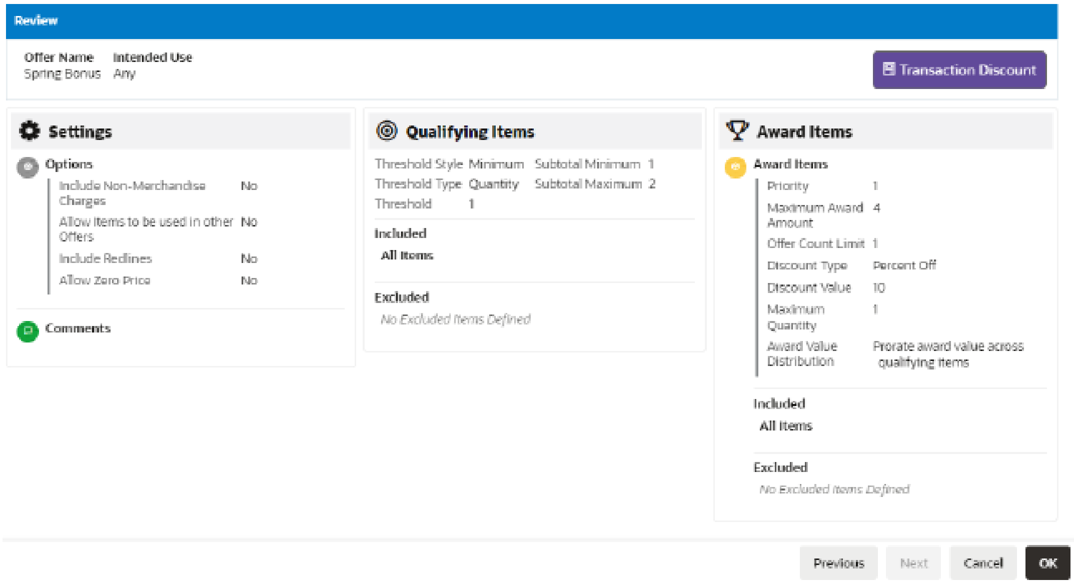
Transaction Discount Review

The **Review** tab displays key elements in the Offer Setup.

Perform the following steps to review and then accept or change the offer.

1. Review the Figure 7-52 for the **Transaction Discount** Offer.

Figure 7-52 Review Tab - Transaction Discount



2. Click **OK** to create the offer, or click **Cancel** to close without saving.

> **Note:**
>
> Before you save the offer, you can use the **tab links** along with **Previous** and **Next** to go back to any point in the create Offer process and make changes.

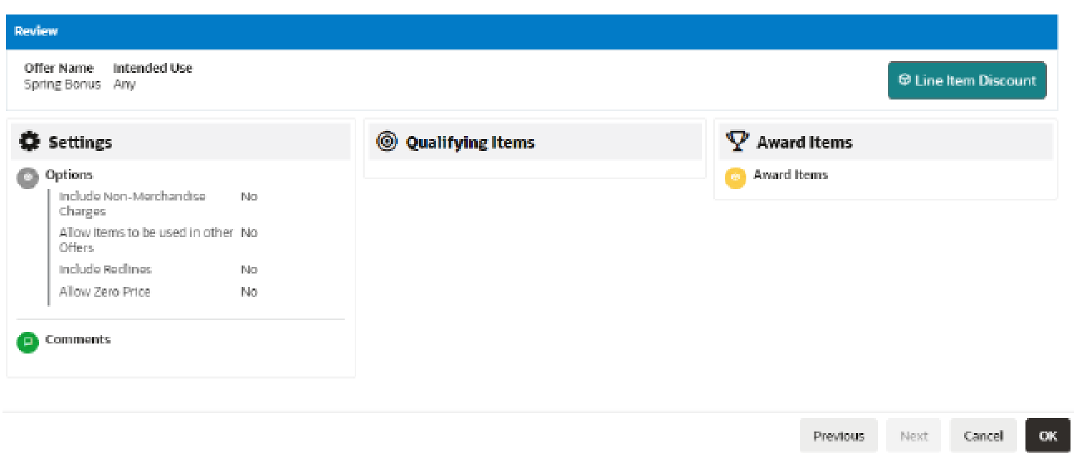
Line Item Discount Review

The **Review** tab displays key elements in the Offer Setup.

Perform the following steps to review and then accept or change the offer.

1. Review the Figure 7-53 for the **Line Item Discount** Offer.

Figure 7-53 Review Tab - Line Item Discount



2. Click **OK** to create the offer, or click **Cancel** to close without saving.

> **Note:**
>
> Before you save the offer, you can use the **tab links** along with **Previous** and **Next** to go back to any point in the create Offer process and make changes.

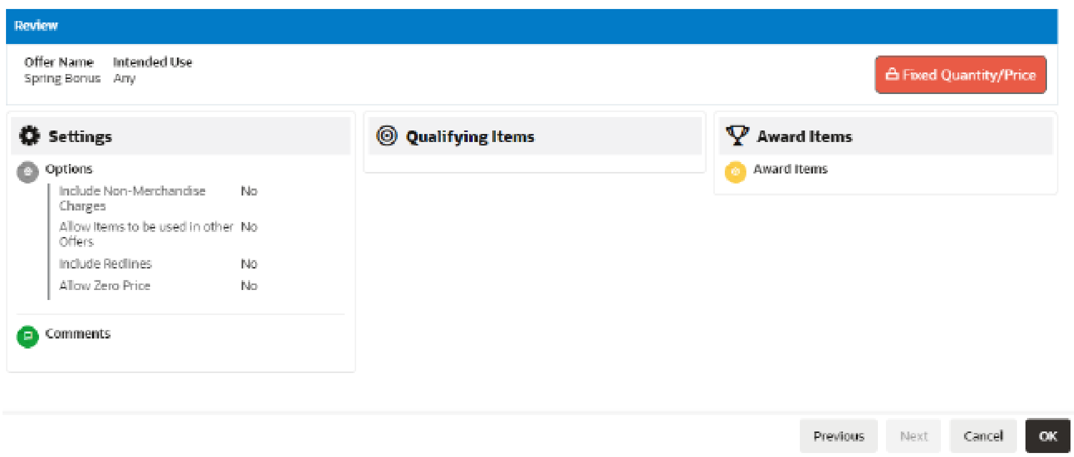
Fixed Quantity/Price Review

The **Review** tab displays key elements in the Offer Setup.

Perform the following steps to review and then accept or change the offer.

1. Review the Figure 7-54 for the **Fixed Quantity/Price** Offer.

Figure 7-54 Review Tab - Fixed Quantity/Price



2. Click **OK** to create the offer, or click **Cancel** to close without saving.

> **Note:**
>
> Before you save the offer, you can use the **tab links** along with **Previous** and **Next** to go back to any point in the create Offer process and make changes.

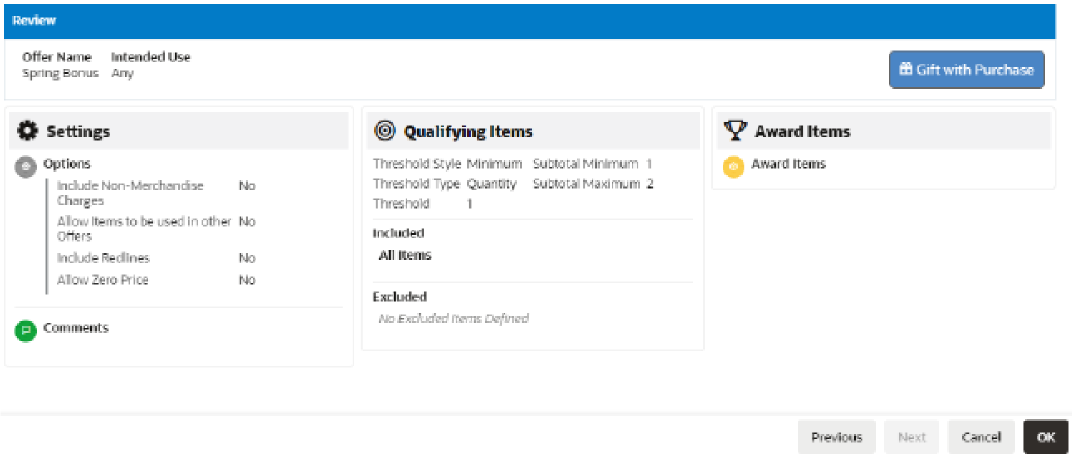
Gift with Purchase Review

The **Review** tab displays key elements in the Offer Setup.

Perform the following steps to review and then accept or change the offer.

1. Review the Figure 7-55 for the **Gift with Purchase** Offer.

Figure 7-55 Review Tab - Gift with Purchase



2. Click **OK** to create the offer, or click **Cancel** to close without saving.

> **Note:**
>
> Before you save the offer, you can use the **tab links** along with **Previous** and **Next** to go back to any point in the create Offer process and make changes.

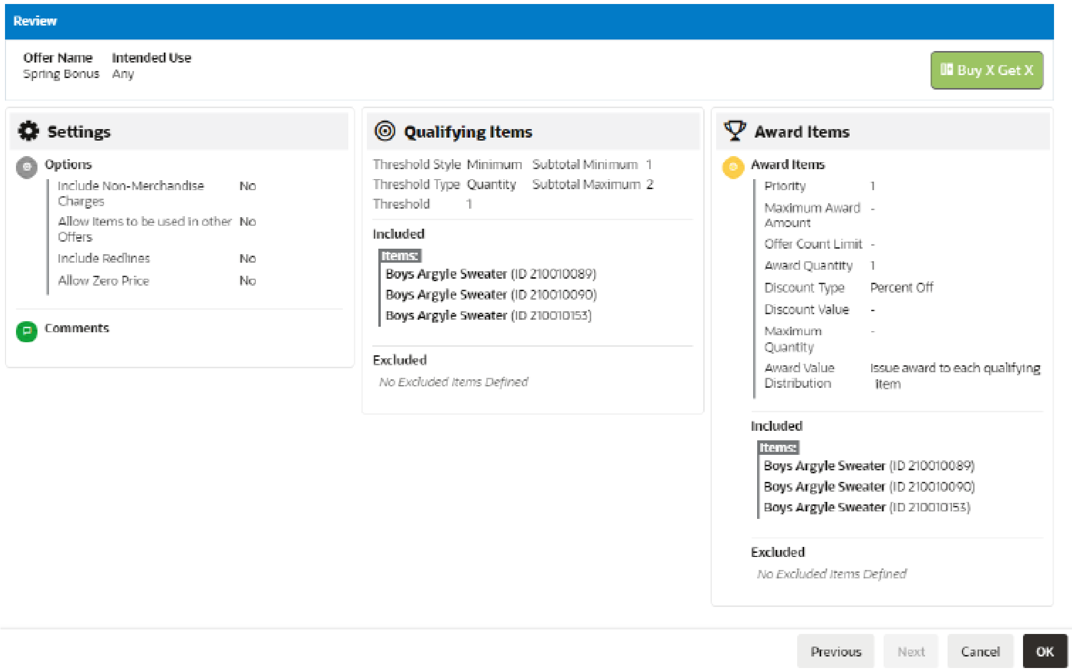
Buy X Get X Review

The **Review** tab displays key elements in the Offer Setup.

Perform the following steps to review and then accept or change the offer.

1. Review the Figure 7-56 for the **Buy X Get X** Offer.

Figure 7-56   Review Tab - Buy X Get X



2. Click **OK** to create the offer, or click **Cancel** to close without saving.

> **Note:**
>
> Before you save the offer, you can use the **tab links** along with **Previous** and **Next** to go back to any point in the create Offer process and make changes.

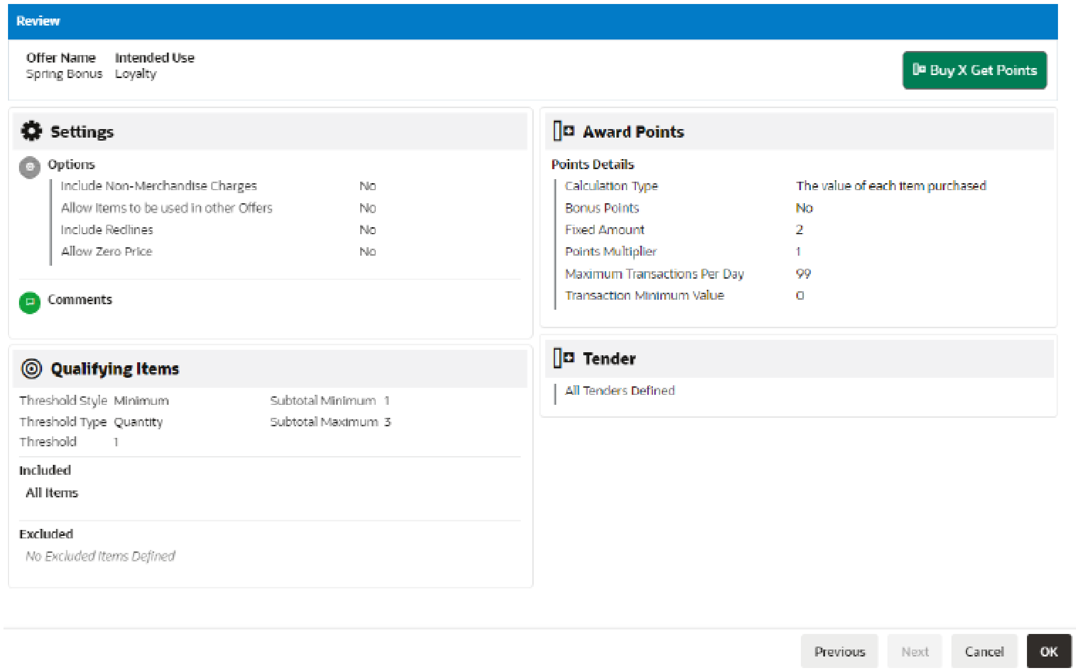
Buy X Get Points Review

The **Review** tab displays key elements in the Offer Setup.

Perform the following steps to review and then accept or change the offer.

1. Review the Figure 7-57 for the **Buy X Get Points** Offer.

Figure 7-57 Review Tab - Buy X Get Points



2. Click **OK** to create the offer, or click **Cancel** to close without saving.

> **Note:**
>
> Before you save the offer, you can use the **tab links** along with **Previous** and **Next** to go back to any point in the create Offer process and make changes.

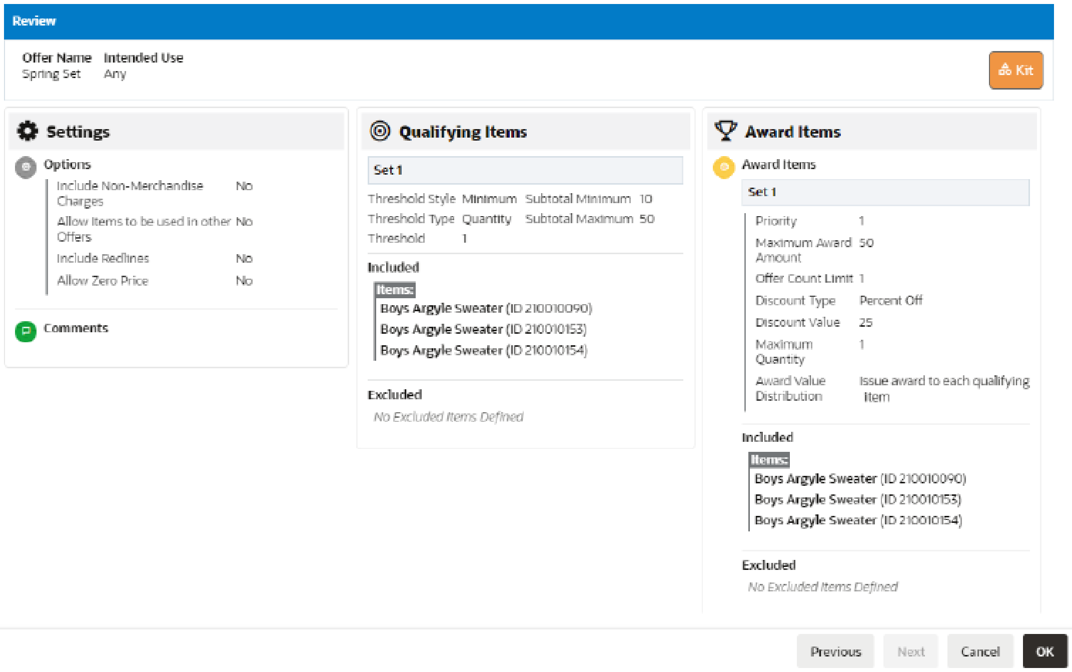
Kit Review

The **Review** tab displays key elements in the Offer Setup.

Perform the following steps to review and then accept or change the offer.

1. Review the Figure 7-58 for the **Kit** Offer.

Figure 7-58   Review Tab - Kit



2. Click **OK** to create the offer, or click **Cancel** to close without saving.

> **Note:**
>
> Before you save the offer, you can use the **tab links** along with **Previous** and **Next** to go back to any point in the create Offer process and make changes.

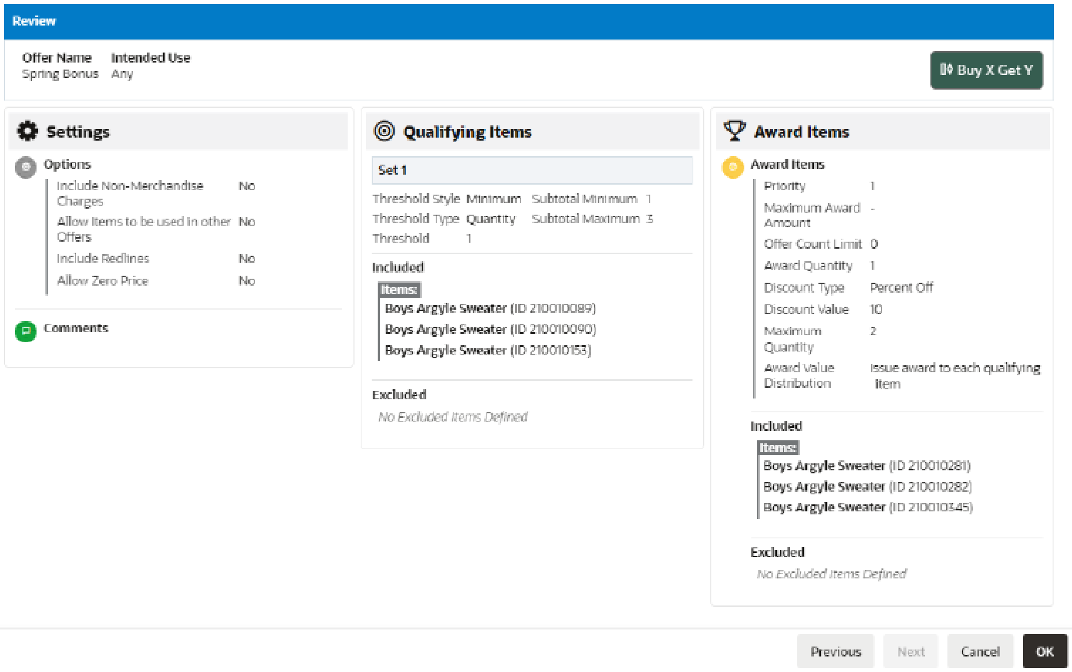
Buy X Get Y Review

The **Review** tab displays key elements in the Offer Setup.

Perform the following steps to review and then accept or change the offer.

1. Review the Figure 7-59 for the **Buy X Get Y** Offer.

Figure 7-59 Review Tab - Buy X Get Y



2. Click **OK** to create the offer, or click **Cancel** to close without saving.

> **Note:**
>
> Before you save the offer, you can use the **tab links** along with **Previous** and **Next** to go back to any point in the create Offer process and make changes.

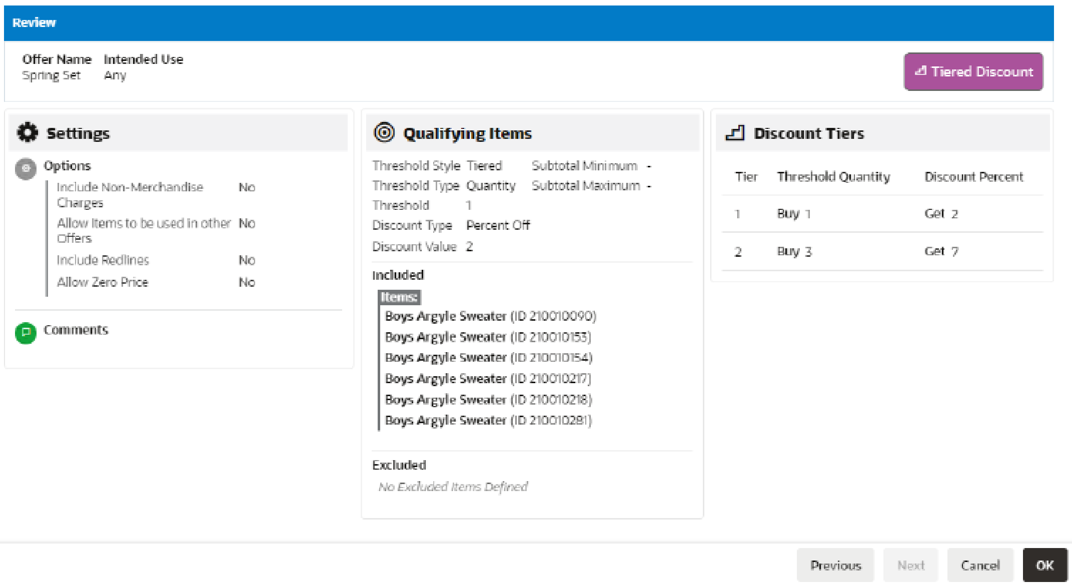
Tiered Discount Review

The **Review** tab displays key elements in the Offer Setup.

Perform the following steps to review and then accept or change the offer.

1. Review the Figure 7-60 for the **Tiered Discount** Offer.

Figure 7-60 Review Tab - Tiered Discount



2. Click **OK** to create the offer, or click **Cancel** to close without saving.

> **Note:**
>
> Before you save the offer, you can use the **tab links** along with **Previous** and **Next** to go back to any point in the create Offer process and make changes.

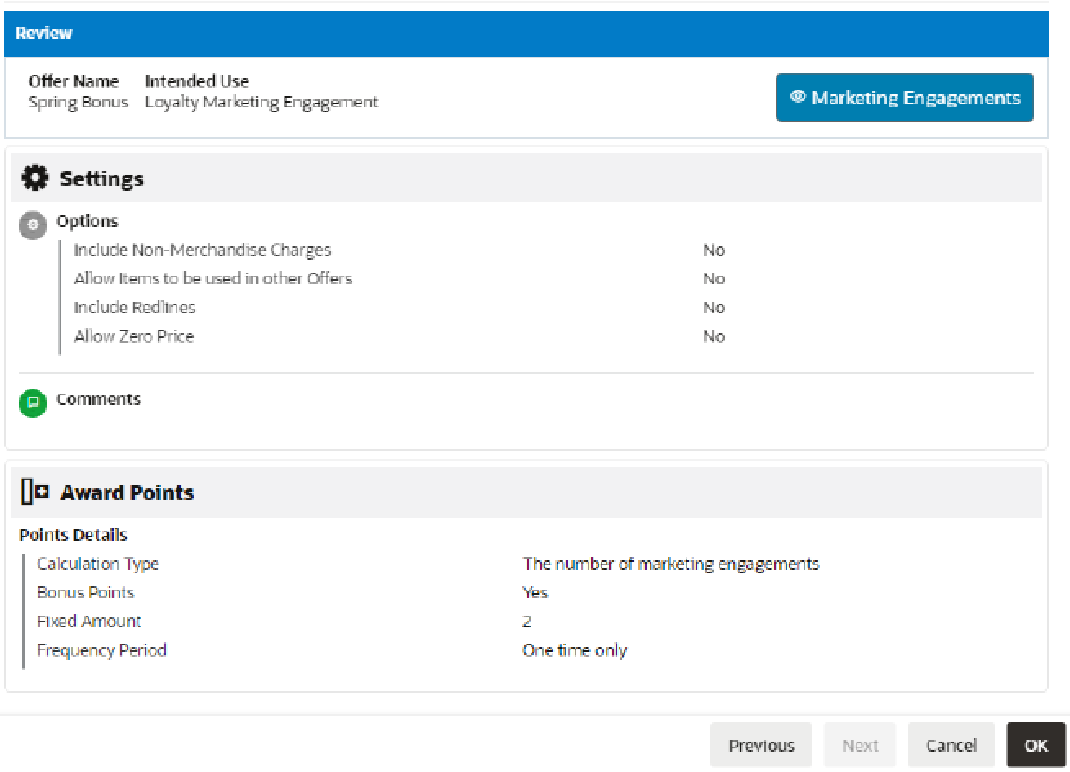
Marketing Engagements Review

The **Review** tab displays key elements in the Offer Setup.

Perform the following steps to review and then accept or change the offer.

1. Review the Figure 7-61 for the **Marketing Engagements** Offer.

Figure 7-61 Review Tab - Marketing Engagements



2. Click **OK** to create the offer, or click **Cancel** to close without saving.

> **Note:**
>
> Before you save the offer, you can use the **tab links** along with **Previous** and **Next** to go back to any point in the create Offer process and make changes.

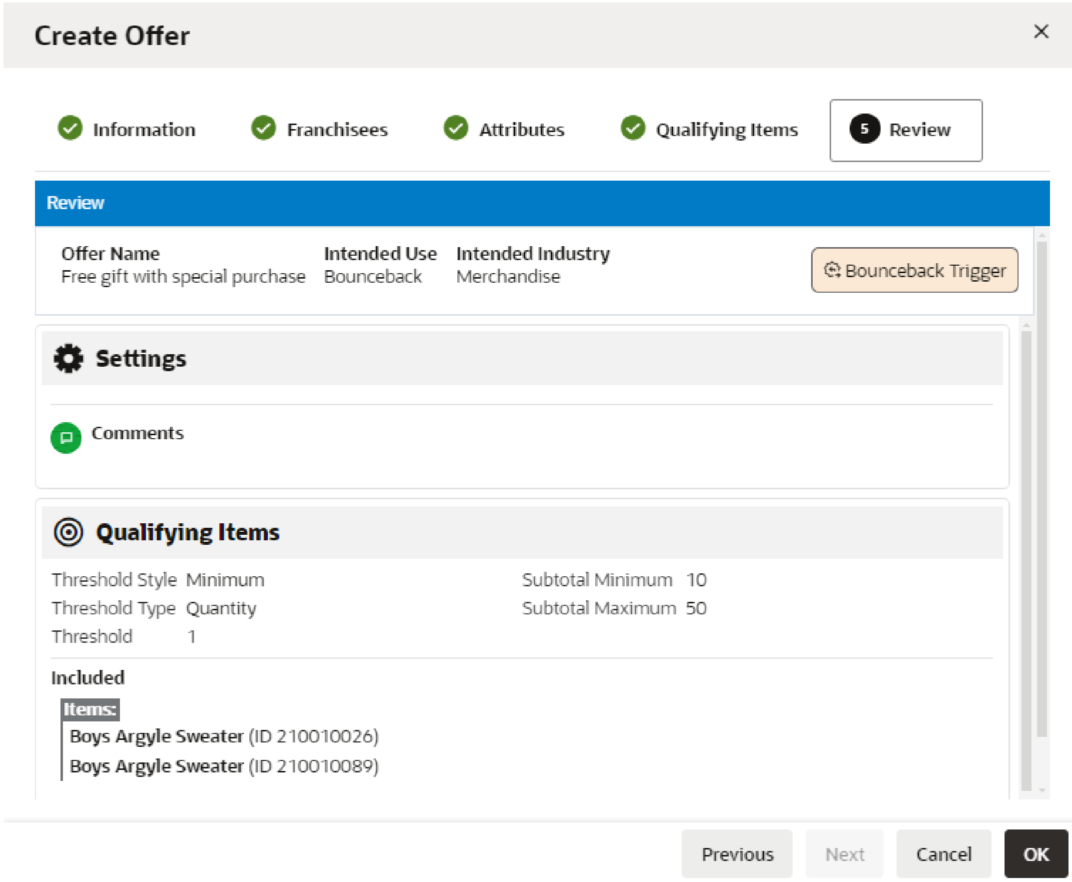
Bounceback Trigger Review

The **Review** tab displays key elements in the Offer Setup.

Perform the following steps to review and then accept or change the offer.

1. Review the tab for the **Bounceback Trigger** Offer.

Figure 7-62   Review Tab - Bounceback Trigger



2. Click **OK** to create the offer, or click **Cancel** to close without saving.

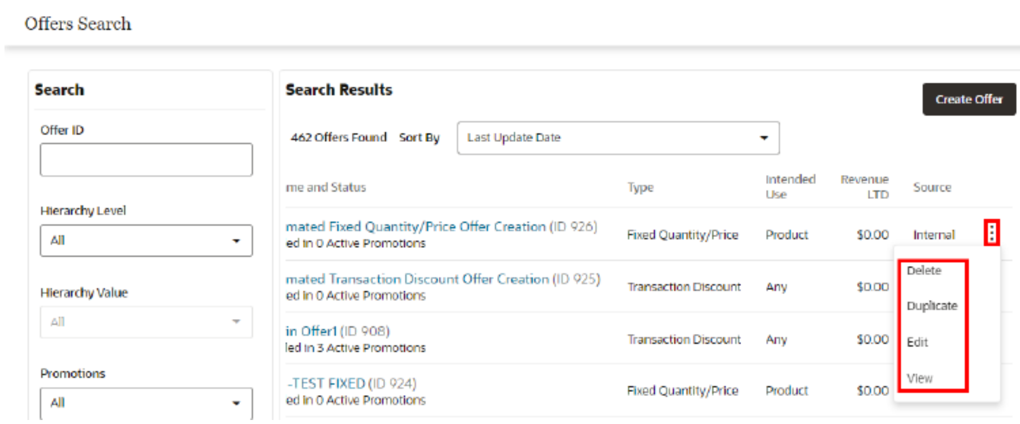
> **Note:**
>
> Before you save the offer, you can use the **tab links** along with **Previous** and **Next** to go back to any point in the create Offer process and make changes.

Deleting Offers

You can access an offer for deleting using the following methods to display the Delete option:

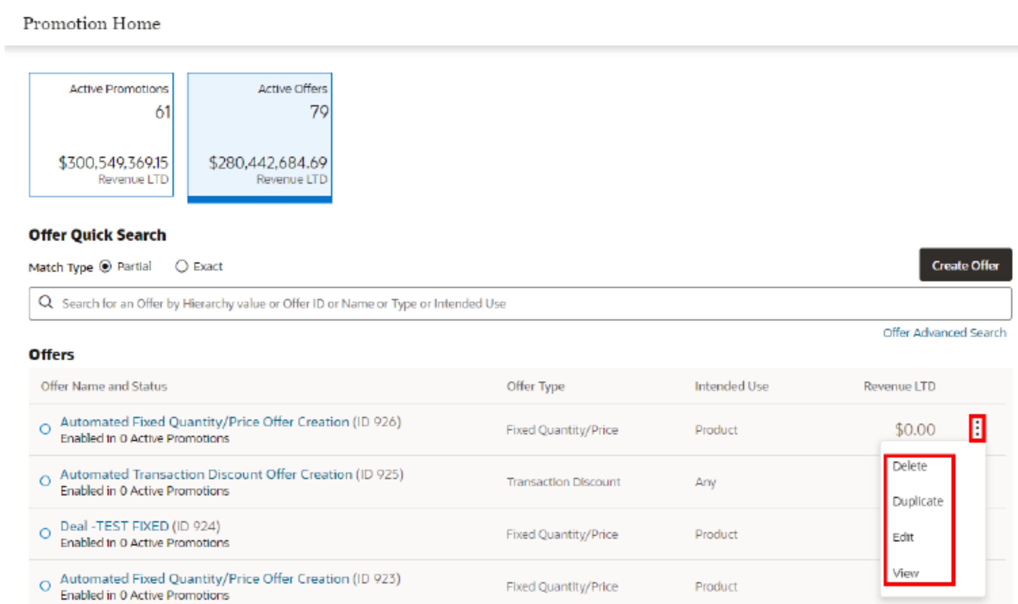
- Offers Search Results
  - Click the **Overflow Menu** icon on the far right in the data display section for each individual Offer on the Offer Advanced Search window (Offer Record Result Section).
  - Click **Delete**.

Figure 7-63 Overflow Menu Options (Offers Advanced Search)



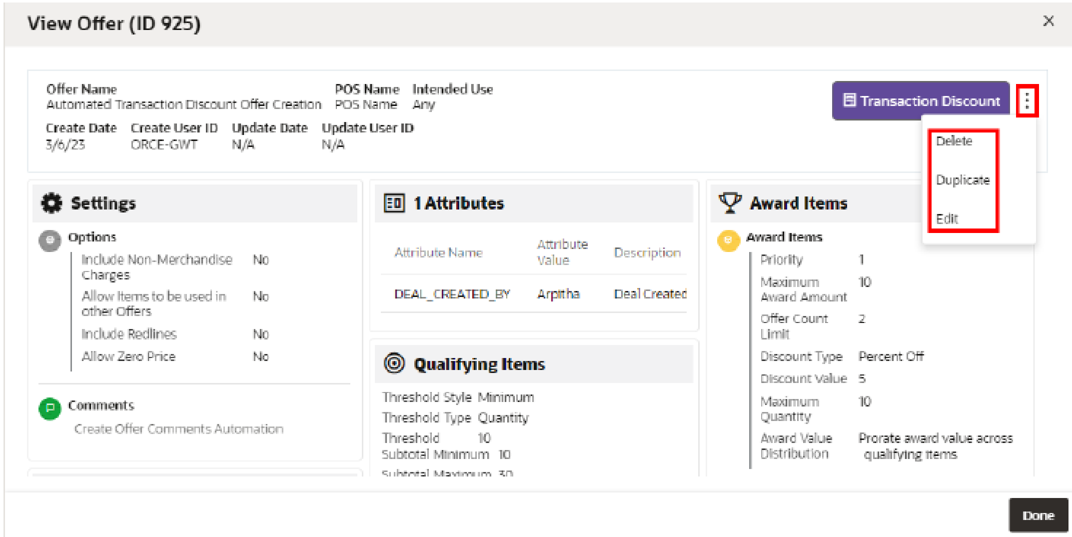
- Offer Quick Search
  - Click the **Overflow Menu icon** on the far right in the data display section for each individual Offer on **Offer Quick Search** window.
  - Click **Delete**.

Figure 7-64 Overflow Menu Options (Offer Quick Search)



- View Offer View
  - Click the **Overflow Menu** icon on the far right in the data display section for each individual Offer while Viewing Offers.
  - Click **Delete**.

Figure 7-65 View Offer (Delete)



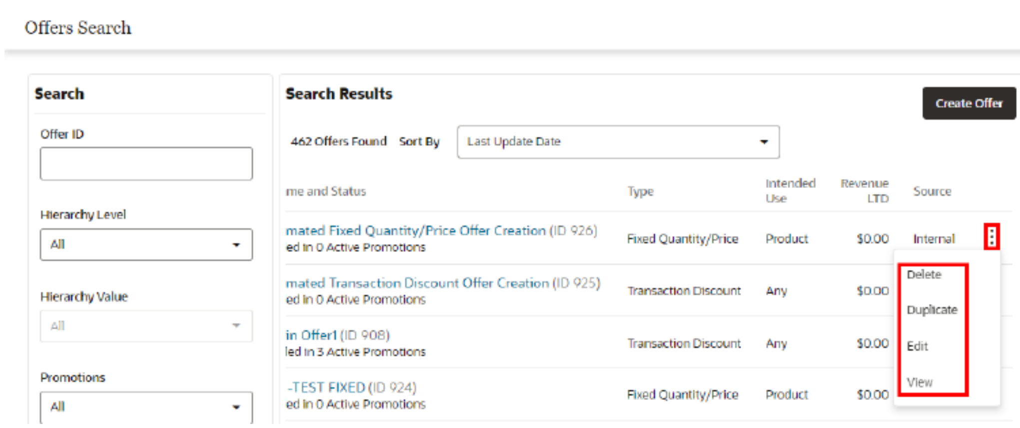
For detailed information on each section while editing an offer see Creating Offers.

Editing Offers

You can access an offer for editing using the following methods to display the Edit option:

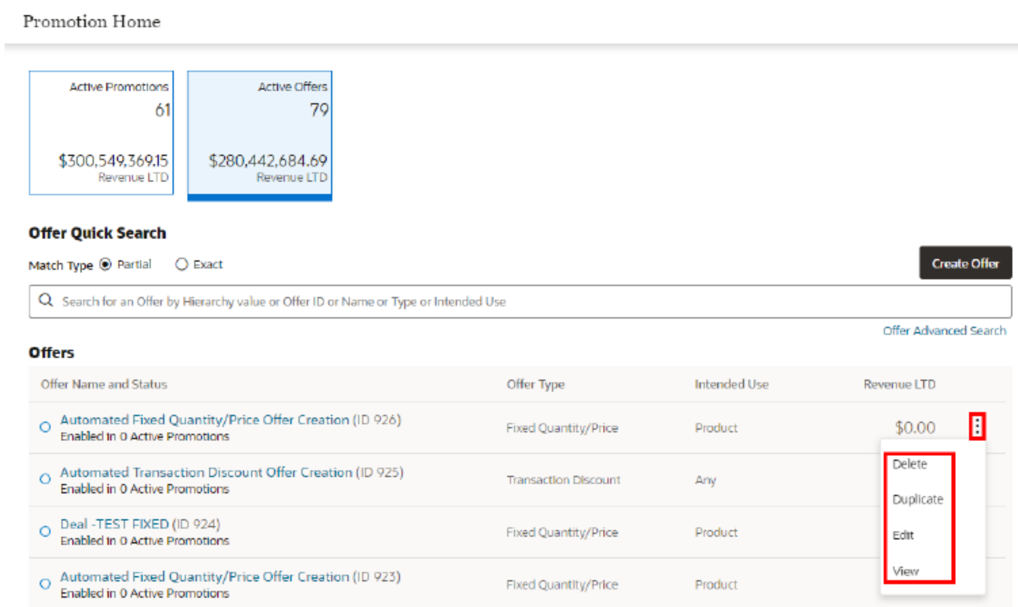
- Offers Search Results
  - Click the **Overflow Menu** icon on the far right in the data display section for each individual Offer on the Offer Advanced Search window (Offer Record Result Section).
  - Click **Edit**.

Figure 7-66 Overflow Menu Options (Offers Advanced Search)



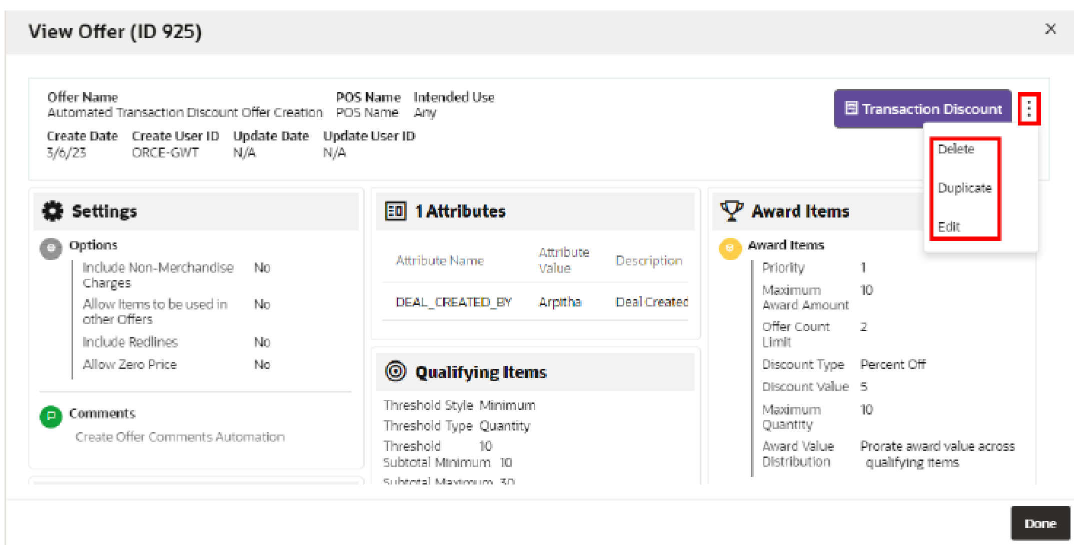
- Offer Quick Search
  - Click the **Overflow Menu icon** on the far right in the data display section for each individual Offer on **Offer Quick Search** window.
  - Click **Edit**.

Figure 7-67 Overflow Menu Options (Offer Quick Search)



- View Offer View
  - Click the **Overflow Menu** icon on the far right in the data display section for each individual Offer while Viewing Offers.
  - Click **Edit**.

Figure 7-68 View Offer (Edit)



For detailed information on each section while editing an offer see Creating Offers.

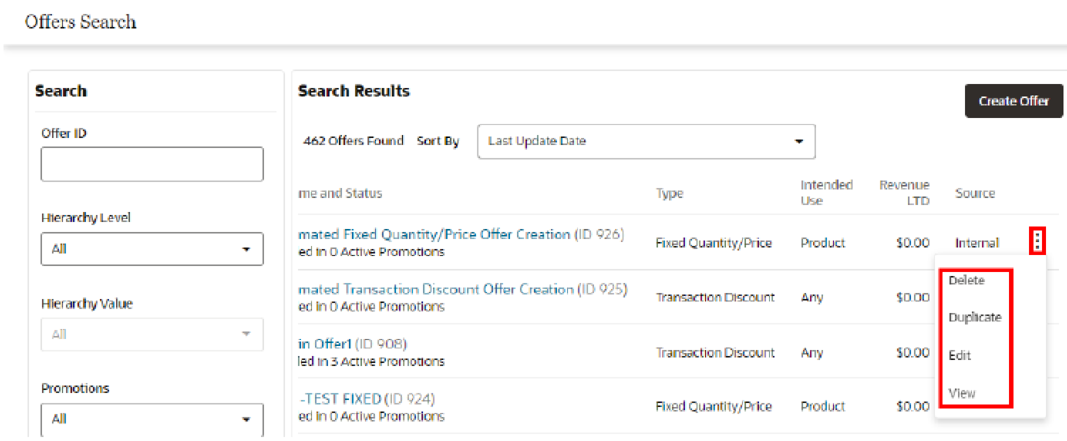
Duplicating Offers

You can duplicate an offer using the following methods to display the Duplicate option:

- Offers Search Results

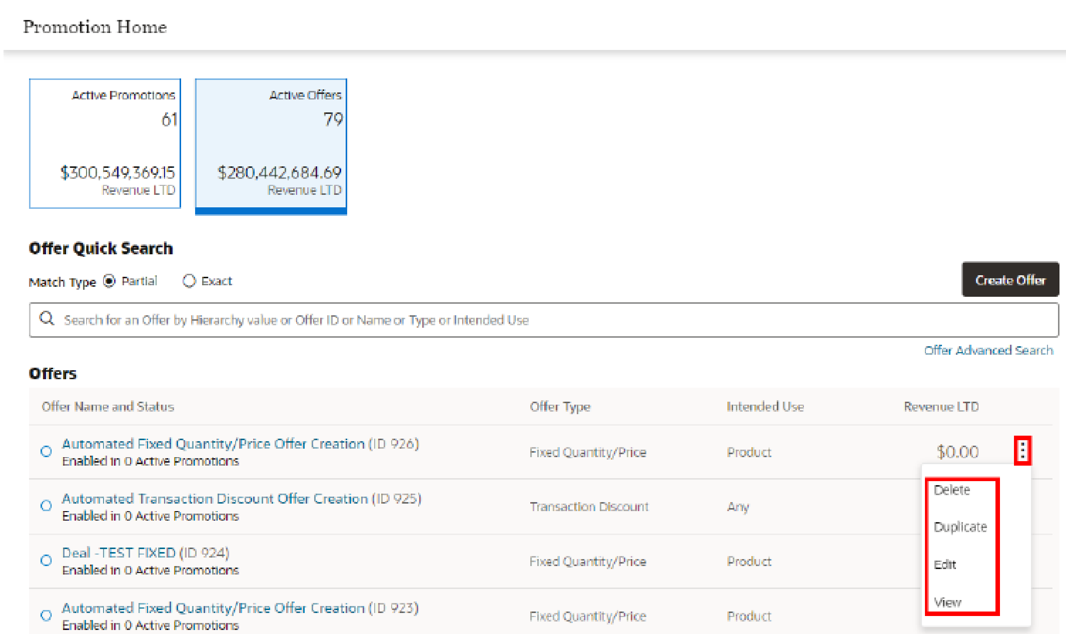
- Click the **Overflow Menu** icon on the far right in the data display section for each individual Offer on the **Offers Advanced Search** window.
- Click **Duplicate**.

Figure 7-69 Overflow Menu Options (Offers Advanced Search)



- Offers Quick Search
  - Click the **Overflow Menu** icon on the far right in the data display section for each individual Offer while Viewing Offers.
  - Click **Duplicate**.

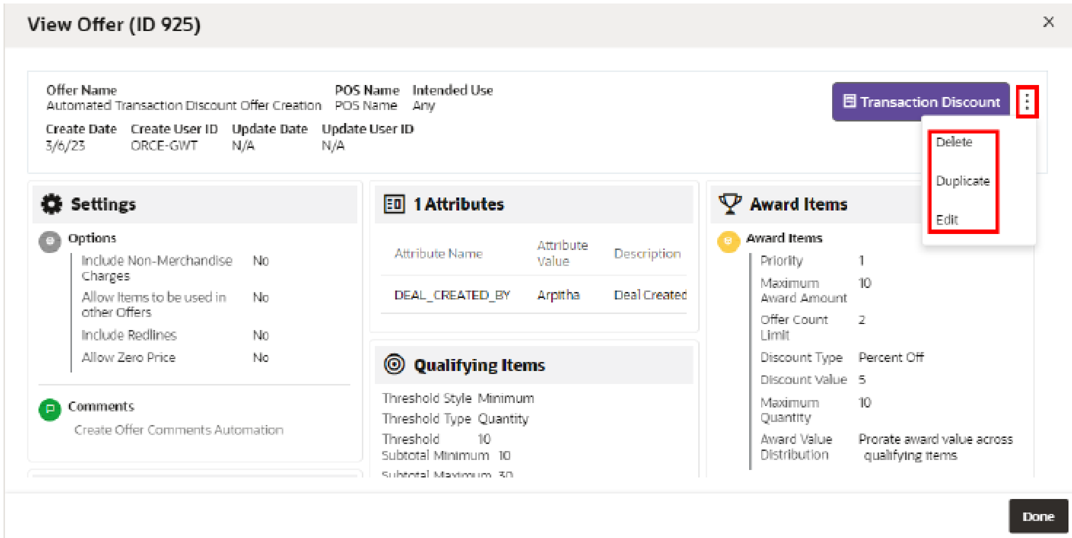
Figure 7-70 Quick Offers Search Overflow Menu icon Options



- View Offer View
  - Click the **Overflow Menu** icon on the far right in the data display section for each individual Offer while Viewing Offers.

– Click **Duplicate**.

Figure 7-71 View Offer (Duplicate)



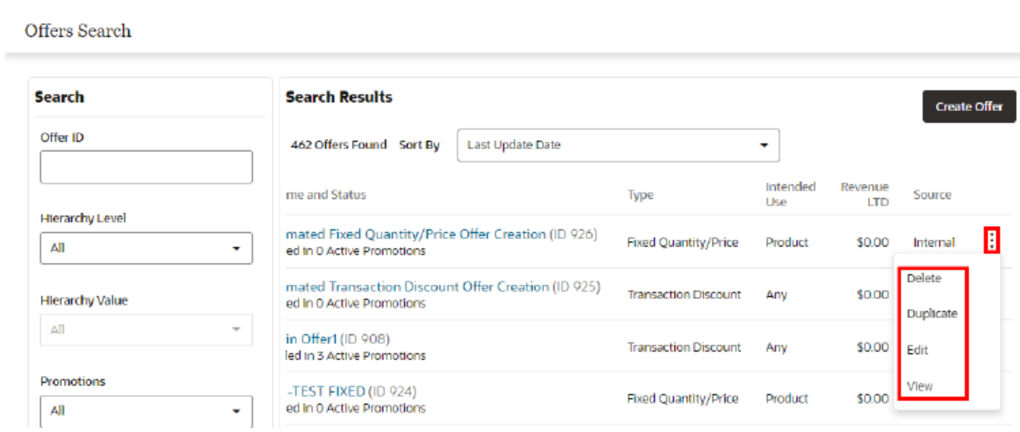
For detailed information on each section after duplicating an offer see Creating Offers.

Viewing Offers

You can access an offer for viewing using the following methods to display the View option:

- Offers Search Results
  - Click the **Overflow Menu** icon on the far right in the data display section for each individual Offer on the Offer Advanced Search window (Offer Record Result section).
  - Click **View**.

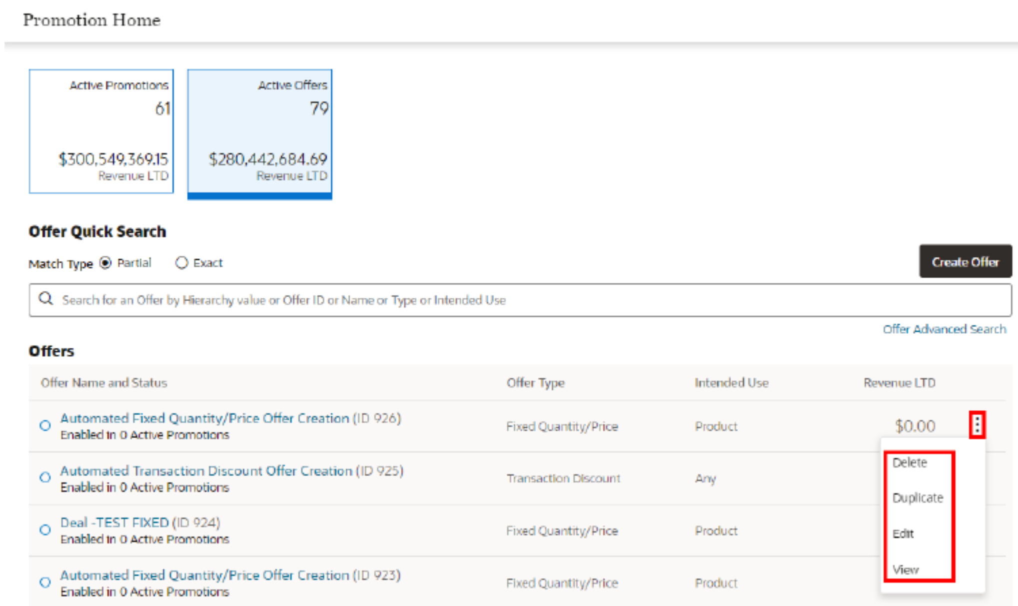
Figure 7-72 Overflow Menu Options (Offers Advanced Search)



- Offer Quick Search
  - Click the **Overflow Menu icon** on the far right in the data display section for each individual Offer on **Offer Quick Search** window.

– Click **View**.

Figure 7-73 Overflow Menu Options (Offer Quick Search)



For detailed information on each section while Viewing an offer see Creating Offers.

Offer Scorecard

The Offer Scorecard displays information about the Offer response in a Promotion. You have the ability to periodically review the response data on Offers that are part of promotions. The Offer Scorecard also displays additional tiles for Loyalty related offers.

Figure 7-74 Offer Scorecard

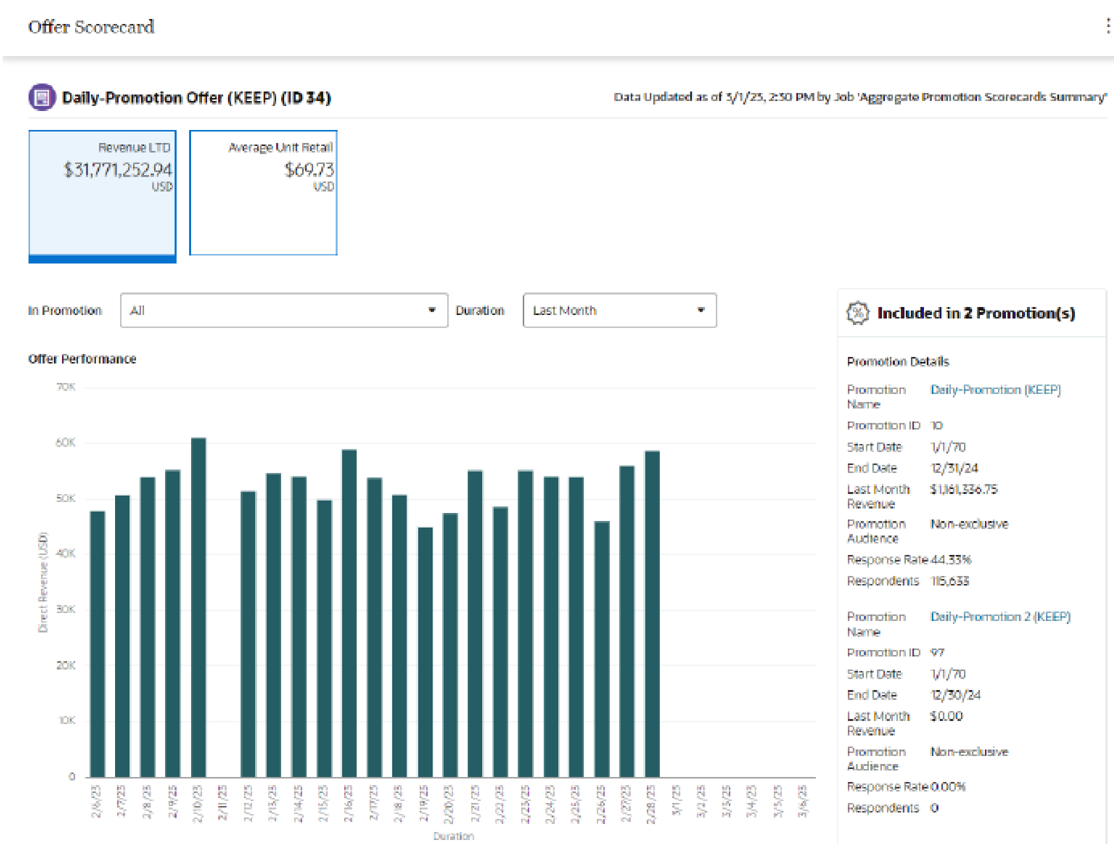
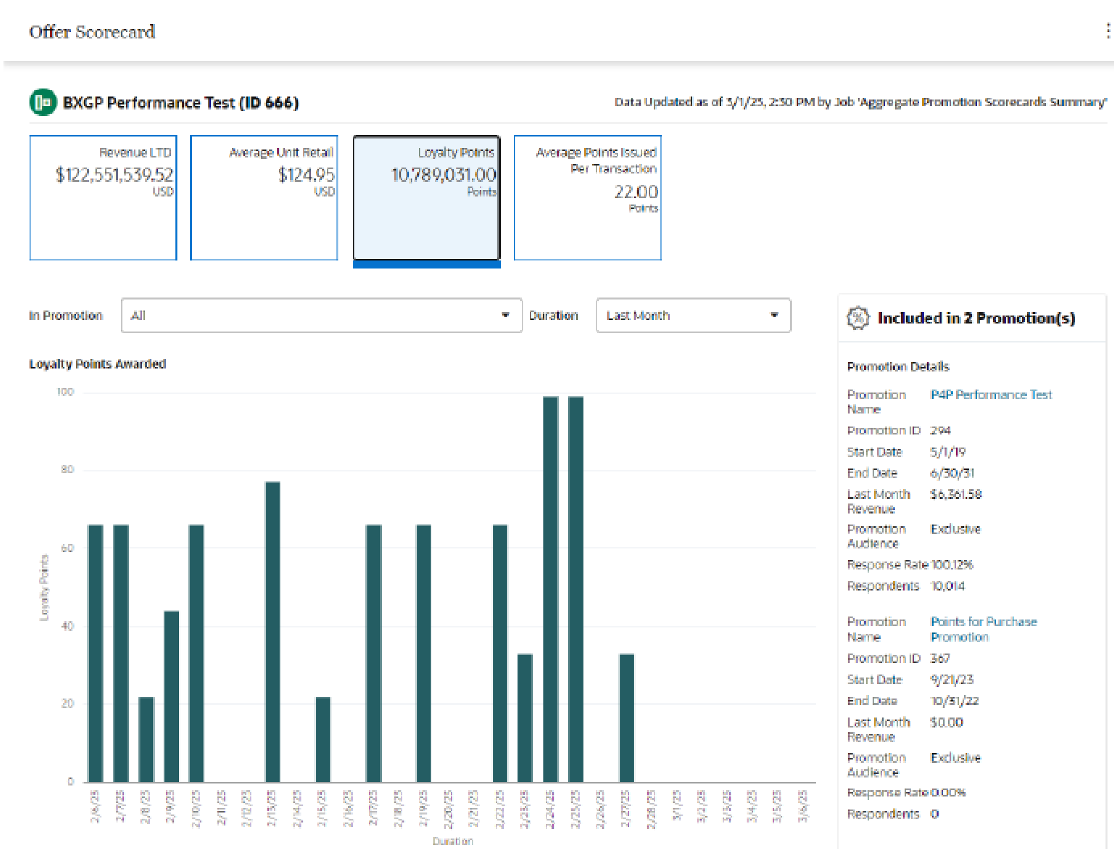


Figure 7-75 Offer Scorecard - Loyalty

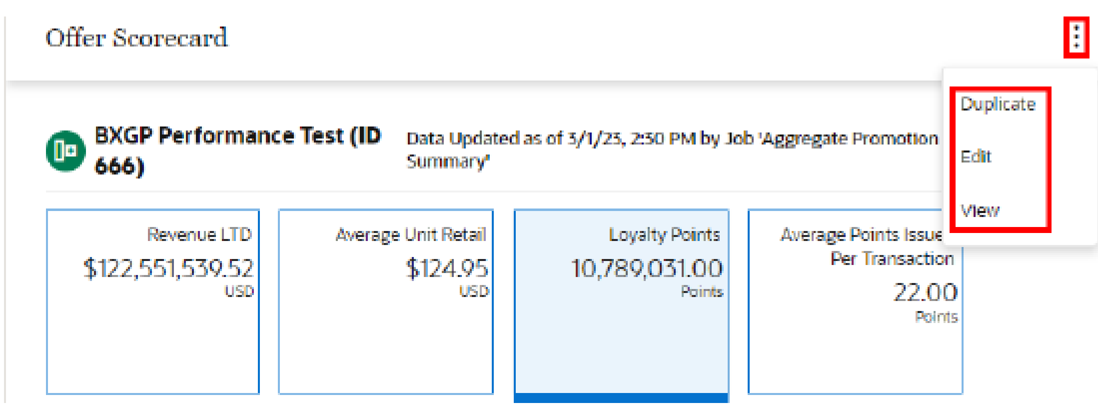


Offer Scorecard Feature Bar

The Offer Scorecard Feature Bar contains the following information:

- Title of the window.
- Action Menu with the ability to **View**, **Edit**, or **Duplicate** the Offer.

Figure 7-76 Action Menu Options



Metric Tiles

Each offer presents a different set of Metric Tiles, click each one to see more information.

Revenue LTD

The Revenue LTD Metric Tile is: Total Direct Revenue generated Lifetime to Date (LTD) from the Offer.

Offer Performance

- In Promotion Filter – List of all the Promotions that the offer is associated with.
- Duration– Durations include:
  - **Last Week** - Offer performance for Last Week (7 days (Current date (-1)) display.
  - **Last Month (Default)** – Offer performance for Last Month (Current date (-1)) display.
  - **Last 6 Months** – Offer performance for Last 6 Months converted into weeks (Current date (-1)) display.
  - **Last Year** – Offer performance for Last 12 months (Current date (-1)) display.
  - **Lifetime to Date** – Offer performance for the last 5 years (Current date (-1)) display.

Graph

- The bar graph dynamically updates the Offer performance based on the value selected for the In Promotion and Duration.
- By default the Offer performance graph displays for All the Promotions which the Offer is part of for the Last Month.
- The graph represents a plot between the Direct Revenue on Y-axis and Duration on X-axis for each individual Promotion.

Promotion Details Side Panel

- **Promotion Name** – Name of the Promotion.
  - Click the **Promotion Name** link from the Promotion Details panel on the Offer Scorecard window to display the View Promotion window for the selected promotion on the same tab. Click **Done** to return to the Offer Scorecard.

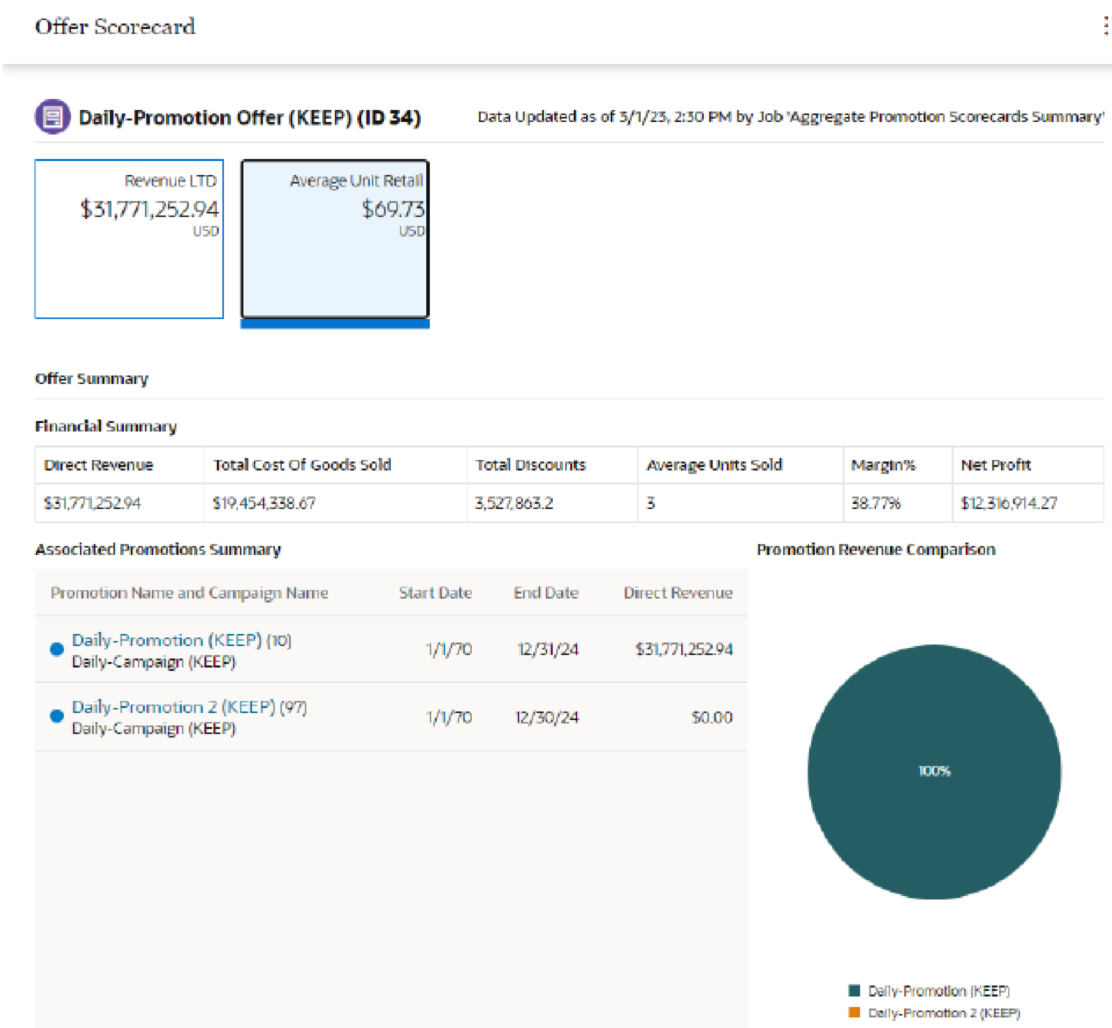
    See Viewing a Promotion to learn more about the information on that window.
- **Promotion ID** – ID of the Promotion.
- **Start Date** – The date the Promotion begins.
- **End Date** – The date the Promotion ends.
- **Revenue** – Offer's Revenue display depending on the value selected in the duration.
- Promotion Target – Indicates the type of targeting used by the Promotion (Nonexclusive or Exclusive).
- Response Rate – Calculated by dividing the total number of Respondents by the Total number targeted. Set to 100.00 for Non-Targeted customers.

- Respondents – Number of Customers in the Target who have responded to the Offer in the Promotion. This is the same as the Total for Non-Targeted customers.

Average Unit Retail Tile

The Average Unit Retail calculated for a given item over a select period of time. To calculate AUR, you simply take the total revenue (or net sales) divided by the number of units sold.

Figure 7-77 Average Unit Retail Tile



Financial Summary

- **Direct Revenue** – Sum Total of the Revenue generated using the offer.
- **Total Cost of Goods Sold** – The sum total of the cost of all the items sold on which the offer was applied.
- **Total Discounts** – Sum Total of the Discounts.
- **Average Units Sold** – Total Number of Items Sold /Total Number of unique Transactions.

- **Margin %** – Net Profit /Direct Revenue
- **Net Profit** – Direct Revenue minus Total Cost Of Goods Sold

Associated Promotions Summary

Data Section

- A full circle represents an Active Promotion or an Empty circle represents an Inactive Promotion.
- **Promotion Name and Campaign Name** – Name of the Promotion and Campaign.
  - When a user selects the promotion name from the list of promotions on the Offer Scorecard window, the system displays the View Promotion window for the selected promotion on the same tab. See Viewing a Promotion for more information.
- **Promotion ID** – Contains the Title ID and the Promotion ID in parenthesis.
- **Start Date** – The date the promotion begins.
- **End Date** – The date the promotion ends.
- **Direct Revenue** – Total extended price of all line items associated with the Promotion's Offers.

Promotion Revenue Comparison

Pie Chart

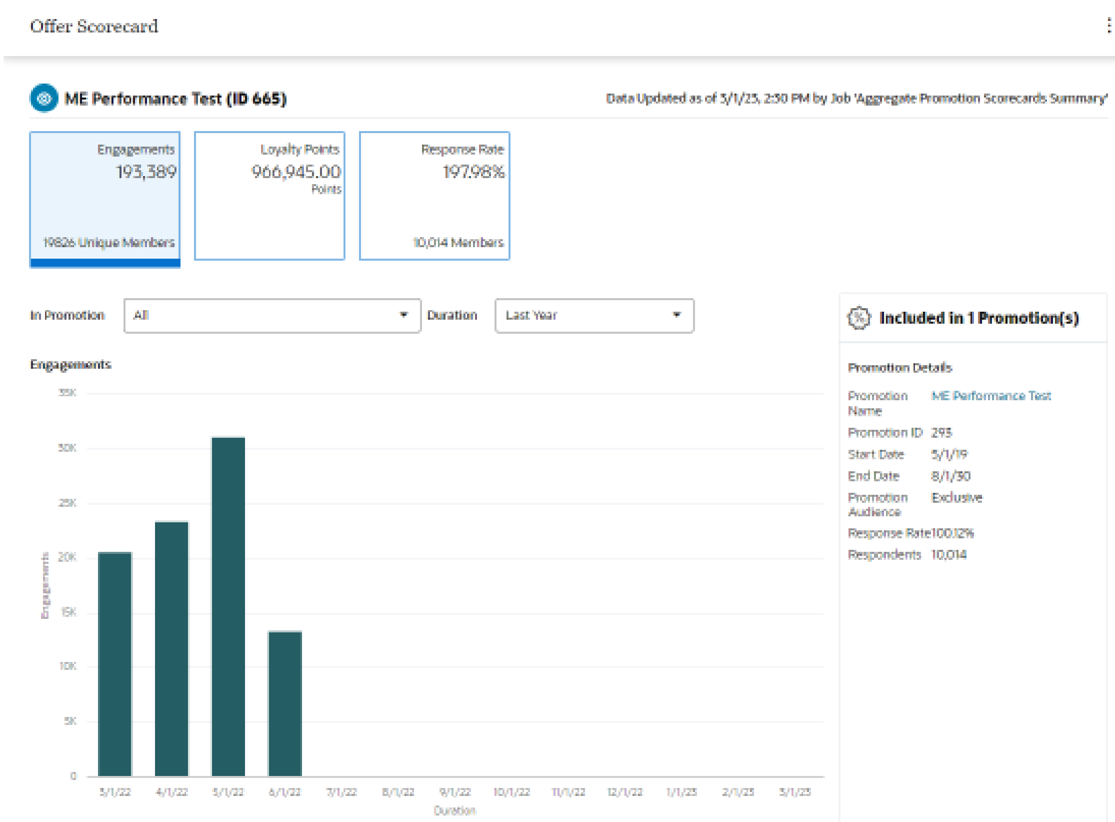
- The pie chart shows the pictorial representation of the direct revenue generated from the respective promotions.
- The title of the pie chart is Promotion Revenue Comparison.
- The maximum of top ten promotions by direct revenue display.
- Each sector of the pie chart represents the direct revenue earned by an individual promotion with a different color.
- A legend displays to the right of the pie chart and is linked with the information displayed in the pie chart.

> **Note:**
>
> To close the Offer Scorecard, click the close icon **X** associated with the Offer Number in the Open Tasks area at the top of the window.

Engagements

The number of times customers interact with marketing media, such as watching a video online.

Figure 7-78 Engagements Metric Tile



- In Promotion - You can choose to view by All promotions (default) or select from the list of promotions associated with the offer.
- Duration– Durations include:
  - **Last Week** - Offer performance for Last Week (7 days (Current date (-1)) display.
  - **Last Month (Default)** – Offer performance for Last Month (Current date (-1)) display.
  - **Last 6 Months** – Offer performance for Last 6 Months converted into weeks (Current date (-1)) display.
  - **Last Year** – Offer performance for Last 12 months (Current date (-1)) display.
  - **Lifetime to Date** – Offer performance for the last 5 years (Current date (-1)) display.

Graph

- The bar graph will dynamically update the Offer performance based on the value selected for the In Promotion and Duration.
- By default the Offer performance graph displays for All the Promotions which the Offer is part of for the Last Month.
- The graph represents a plot between the Engagements on Y-axis and Duration on X-axis for each individual Promotion.

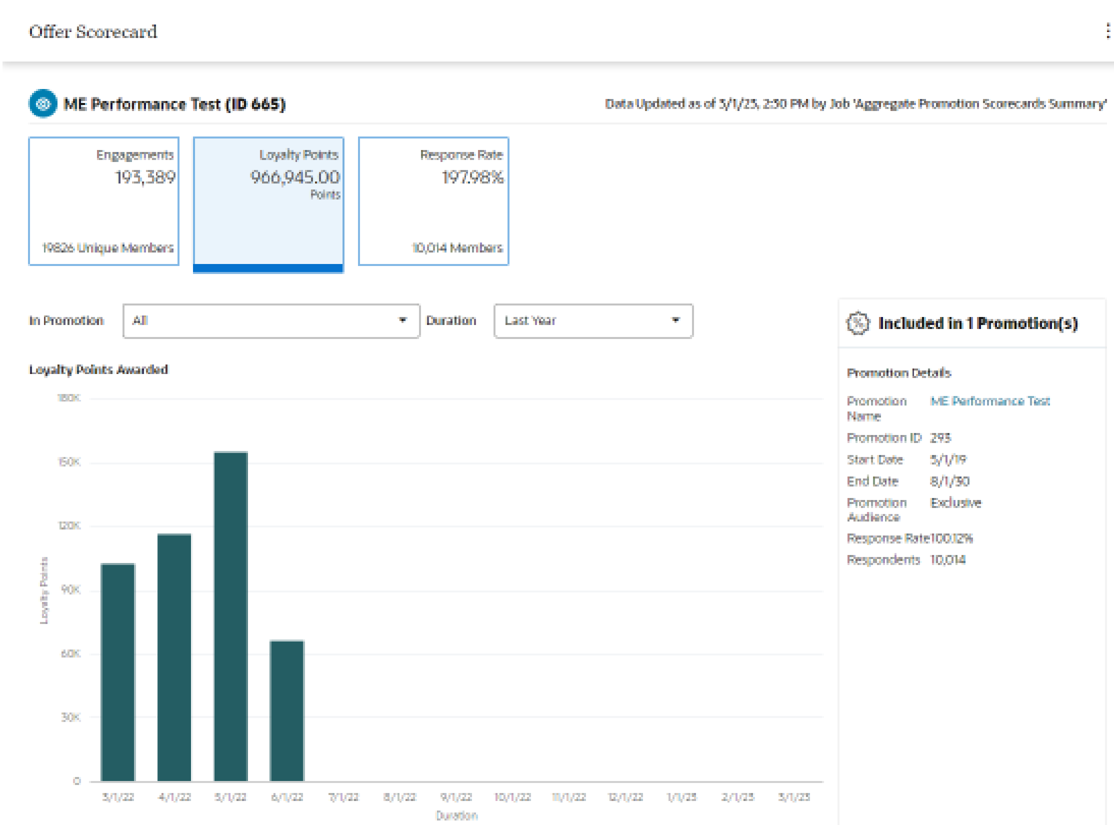
Promotion Details Side Panel

- Promotion Name – Name of the Promotion.
  - Click the **Promotion Name** link from the Promotion Details panel on the Offer Scorecard window to display the View Promotion window for the selected promotion on the same tab. Click **Done** to return to the Offer Scorecard. See Viewing a Promotion to learn more about the information on that window.
- Promotion ID – ID of the Promotion.
- Start Date – The date the Promotion begins.
- End Date – The date the Promotion ends.
- Promotion Audience – Indicates the type of targeting used by the Promotion (Nonexclusive or Exclusive).
- Response Rate – Calculated by dividing the total number of Respondents by the Total number targeted. Set to 100.00 for Non-Targeted customers.
- Respondents – Number of Customers in the Target who have responded to the Offer in the Promotion. This is the same as the Total for Non-Targeted customers.

Loyalty Points

Total points issued during the Promotion period to the members against their purchase activity. The Points are calculated as defined in the Offers which is the part of this Promotion.

Figure 7-79 Loyalty Points Metric Tile



- In Promotion - You can choose to view by All promotions (default) or select from the list of promotions associated with the offer.

- Duration– Durations include:
  - **Last Week** - Offer performance for Last Week (7 days (Current date (-1)) display.
  - **Last Month (Default)** – Offer performance for Last Month (Current date (-1)) display.
  - **Last 6 Months** – Offer performance for Last 6 Months converted into weeks (Current date (-1)) display.
  - **Last Year** – Offer performance for Last 12 months (Current date (-1)) display.
  - **Lifetime to Date** – Offer performance for the last 5 years (Current date (-1)) display.

Graph

- The bar graph will dynamically update the Offer performance based on the value selected for the In Promotion and Duration.
- By default the Offer performance graph displays for All the Promotions which the Offer is part of for the Last Month.
- The graph represents a plot between the Loyalty Points on Y-axis and Duration on X-axis for each individual Promotion.

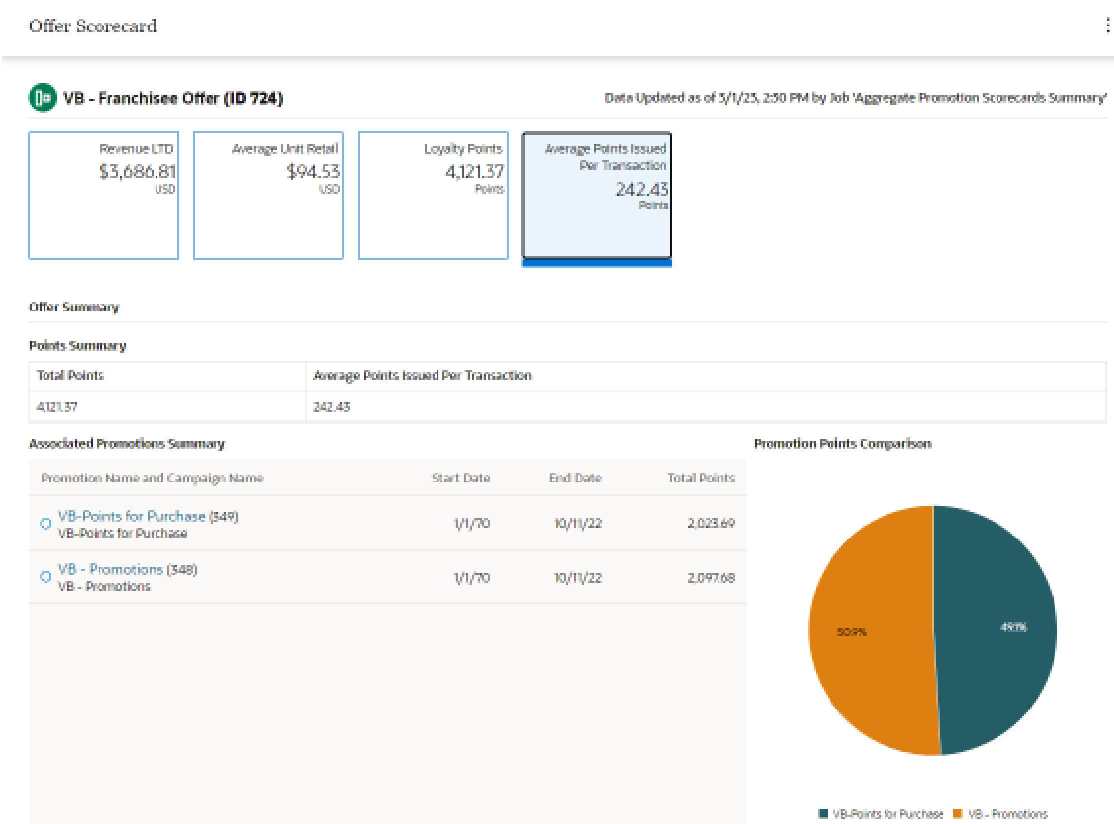
Promotion Details Side Panel

- Promotion Name – Name of the Promotion.
  - Click the **Promotion Name** link from the Promotion Details panel on the Offer Scorecard window to display the View Promotion window for the selected promotion on the same tab. Click **Done** to return to the Offer Scorecard. See Viewing a Promotion to learn more about the information on that window.
- Promotion ID – ID of the Promotion.
- Start Date – The date the Promotion begins.
- End Date – The date the Promotion ends.
- Promotion Audience – Indicates the type of targeting used by the Promotion (Nonexclusive or Exclusive).
- Response Rate – Calculated by dividing the total number of Respondents by the Total number targeted. Set to 100.00 for Non-Targeted customers.
- Respondents – Number of Customers in the Target who have responded to the Offer in the Promotion. This is the same as the Total for Non-Targeted customers.

Average Points Issued Per Transaction

Average number of points issued per Transaction during the Promotion period to the members against their purchase activity. The Average Value (Total Points issued/Number of Transaction).

Figure 7-80 Average Points Issued Per Transaction Metric Tile



Offer Summary - Points Summary

- Total Points – Sum Total of the Points generated using the offer.
- Average Points Issued Per Transaction – Average number of points issued per Transaction during the Promotion period to the members against their purchase activity. The Average Value (Total Points issued/Number of Transaction).

Associated Promotions Summary

Data Section

- A full circle represents an Active Promotion or an empty circle represents an Inactive Promotion.
- **Promotion Name and Campaign Name** – Name of the Promotion and Campaign.
  - When a user selects the promotion name from the list of promotions on the Offer Scorecard window, the system displays the View Promotion window for the selected promotion on the same tab. See Viewing a Promotion for more information.
- **Promotion ID** – Contains the Title ID and the Promotion ID in parenthesis.
- **Start Date** – The date the promotion begins.
- **End Date** – The date the promotion ends.
- **Total Points** – Total points distributed with all the Promotion's Offers.

Promotion Points Comparison

Pie Chart

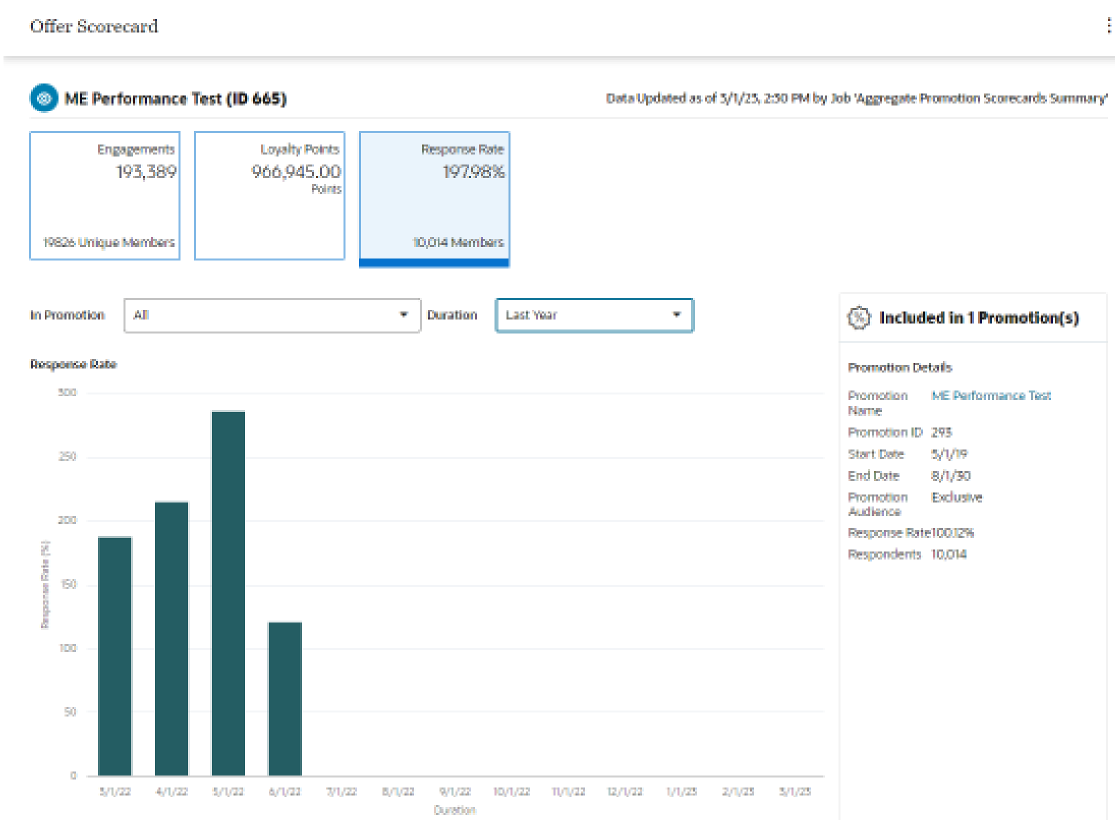
- The pie chart shows the pictorial representation of the points distributed from the respective promotions.
- The title of the pie chart is Promotion Points Comparison.
- The maximum of top ten promotions by direct revenue display.
- Each sector of the pie chart represents the points distributed by an individual promotion with a different color.
- A legend displays to the right of the pie chart and is linked with the information displayed in the pie chart.

> **Note:**
>
> To close the Offer Scorecard, click the close icon **X** associated with the Offer Number in the Open Tasks area at the top of the window.

Response Rate

Calculated by dividing the total number of Respondents by the Total number targeted. Set to 100.00 for Non-Targeted customers.

Figure 7-81 Response Rate Metric Tile



Graph

- The bar graph will dynamically update the Offer Response Rate based on the value selected for the In Promotion and Duration.
- By default the Response Rate performance graph displays for All the Promotions which the Offer is part of for the Last Month.
- The graph represents a plot between the Response Rate on Y-axis and Duration on X-axis for each individual Promotion.

Promotion Details Side Panel

- **Promotion Name** – Name of the Promotion.
  – Click the **Promotion Name** link from the Promotion Details panel on the Offer Scorecard window to display the View Promotion window for the selected promotion on the same tab. Click **Done** to return to the Offer Scorecard. See Viewing a Promotion to learn more about the information on that window.
- **Promotion ID** – ID of the Promotion.
- **Start Date** – The date the Promotion begins.
- **End Date** – The date the Promotion ends.
- **Promotion Audience** – Indicates the type of targeting used by the Promotion (Nonexclusive or Exclusive).

- **Response Rate** – Calculated by dividing the total number of Respondents by the Total number targeted. Set to 100.00 for Non-Targeted customers.
- **Respondents** – Number of Customers in the Target who have responded to the Offer in the Promotion. This is the same as the Total for Non-Targeted customers.

8 Segments

Customer Segments organize Customers into groups related by certain, specified criteria. These Segments can be used to define the Segment/Target Eligibility rules used by various Customer Engagement elements.

There are three types of Customer Segments:

- **Stratified** - Segments in which the Customers belonging to the segment are divided into stratified subgroups (or levels) determined by certain criteria, such as year-to-date total purchases, Customer age, annual income, or some other criteria. These Segments are described in Stratified Segments.
- **Unstratified** - Segments in which Customers belonging to the segment are not subdivided into different groups; that is, the Customers within the Segment are not differentiated into subgroups by the Segment. These Segments are described in Unstratified Segments.
- **Personal Lists** - Segments created by selecting Customers one-by-one. Associates can use Personal Lists to create Favorite Customer lists. These Segments are described in Personal Lists.

About this Chapter

This chapter contains the following information:

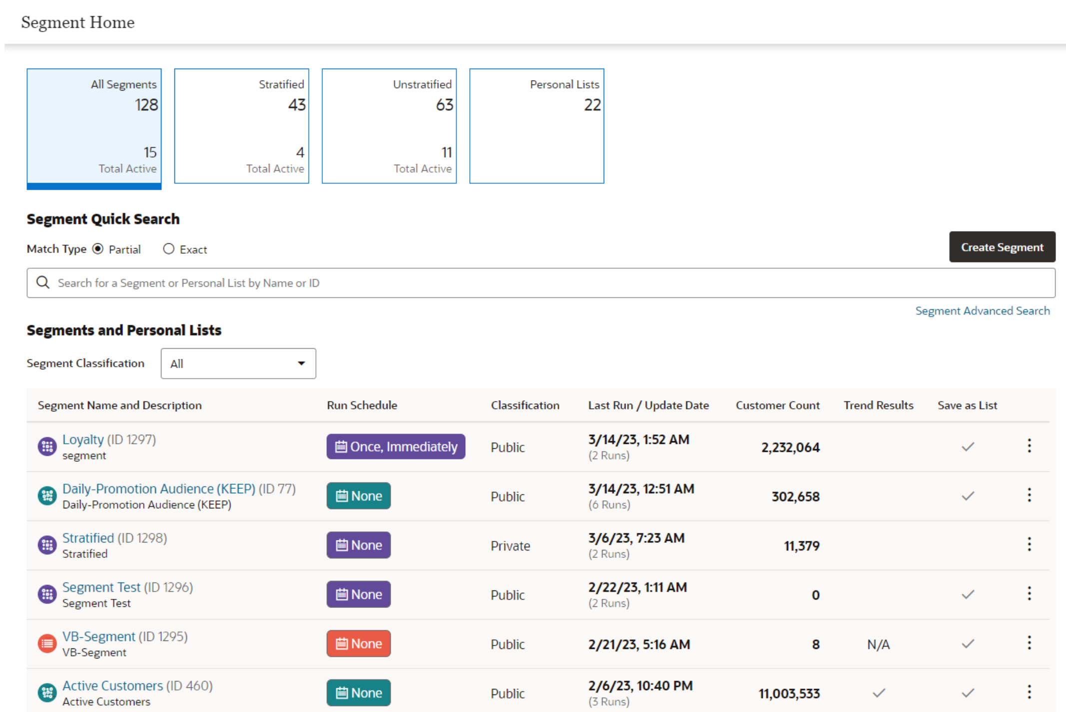
- Segment Quick Search
- Segment Advanced Search
- Creating a Segment or Personal List
- Editing Segments/Personal Lists
- Duplicating Segments/Personal Lists
- Viewing Segments/Personal Lists
- Exporting Segments
- Deleting Segments/Personal Lists
- Segment Scorecards

Segment Quick Search

Segments Quick Search displays a list of results as you type in characters in the search box. To use the Segments Quick Search do the following:

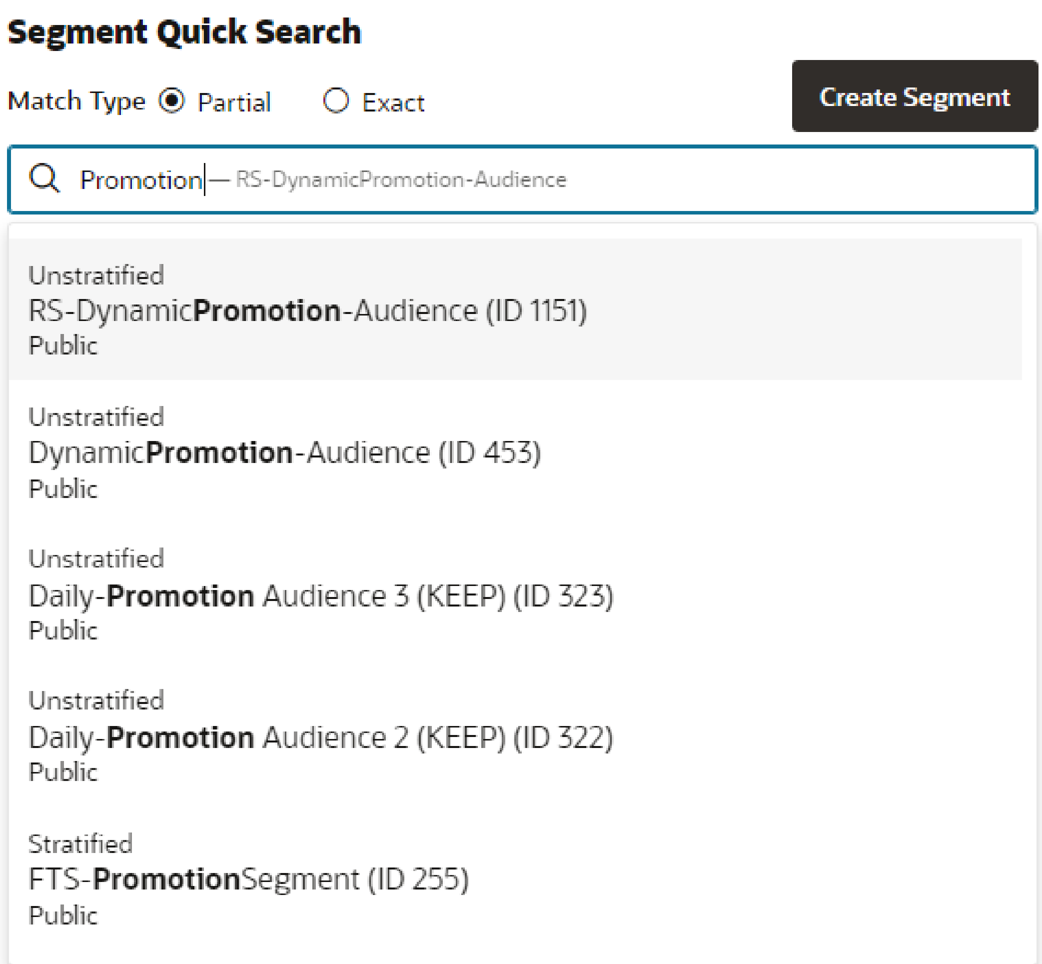
1. Click **Tasks**.
2. Click **Segment**.
3. Click **Segment Home**.

Figure 8-1 Segment Home - All Segments Metric Tile



4. Select a Metric Tile, options include:
   - All Segments
   - Stratified
   - Unstratified
   - Personal Lists
5. In the Search for Segments field, enter the Name or ID of the Segment or Personal List you want to search for. Click **Partial** to search for Segments or Personal Lists that partially match the search text, or click **Exact**, to search for an exact match.

Figure 8-2 Segments and Personal List Results



The search results display the following fields:

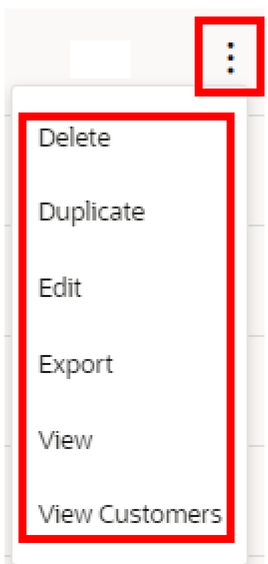
- Name and Description
- Run Schedule
- Classifications
- Last Run
- Customer Count
- Trend Results
- Save as List

6. The search results can be filtered by Segment Classification. The options include:
   - All (Default)
   - Open Access
   - Private
   - Public
7. Hover over any Run Schedule field to see a tooltip listing the following information.

- Job ID
- Run Interval
- Status of Last Run
- Duration
- Started Date/Time
- Ended Date/Time
- Planned Next Run Date/Time

8. Click the **Name** which appears as a link for any Segment to open the Segment Scorecard. See Segment Scorecards for more information. Use the Overflow Menu to Delete, Duplicate, Edit, Export, View, or View Customers of the segment. See Deleting Segments/Personal Lists, Duplicating Segments/Personal Lists, Editing Segments/Personal Lists, Exporting Segments, or Viewing Segments/Personal Lists for more information.

Figure 8-3 Action Menu Options - Segments Quick Search

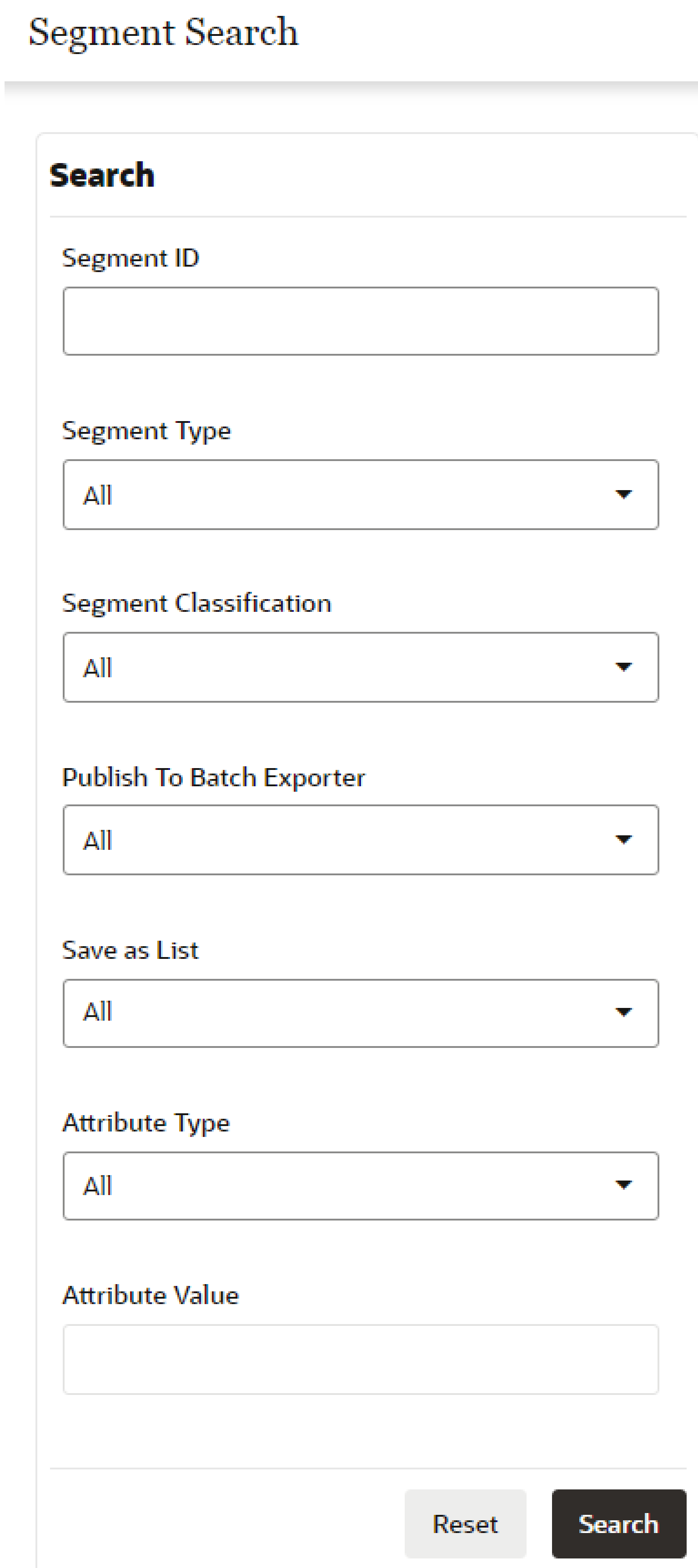


Segment Advanced Search

The Segment Advanced Search allows you to select more criteria that are not available in the Segment Quick Search box. The Segment Advanced Search is accessed by the following methods:

- Click the Advanced Search Link below the Segment Quick Search box in the Segment Home window.
- Click Segment Search in the Segment Task menu. See Navigation for more information.

Figure 8-4   Segment Advanced Search Window



The following Search fields are available:

- **Segment ID** - This Text Field searches all the Segments currently present in the application. The default is an empty field.
- **Segment Type** - Search by Segment Type. The default field is All.
  - All
  - Personal Lists

    > **Note:**
    >
    > When the selected Segment type is Personal list, the search parameter Trend Results will not display

  - Stratified
  - Unstratified
- **Segment Classification -** Search the Segment by the classification assigned to the Segment. The field will default to All.
  - All
  - Open Access
  - Private
  - Public
- **Publish to Batch Exporter -** The following options include:
  - All (Default)
  - Yes
  - No
- **Save as List** - The following options include:
  - All (Default)
  - Yes
  - No
- **Attribute Type** - Search for the Segment by the Attribute Type assigned to the Segment. The default is **All**.
- **Attributes Value** - Enter or select a value according to the Attribute Type selected above.
- **Publish to Clienteling -** The following options include:
  - All (Default)
  - Yes
  - No
- **Publish to Task Generator** - The following options include:
  - All (Default)
  - Yes
  - No
- **Trend Results -** The following options include:

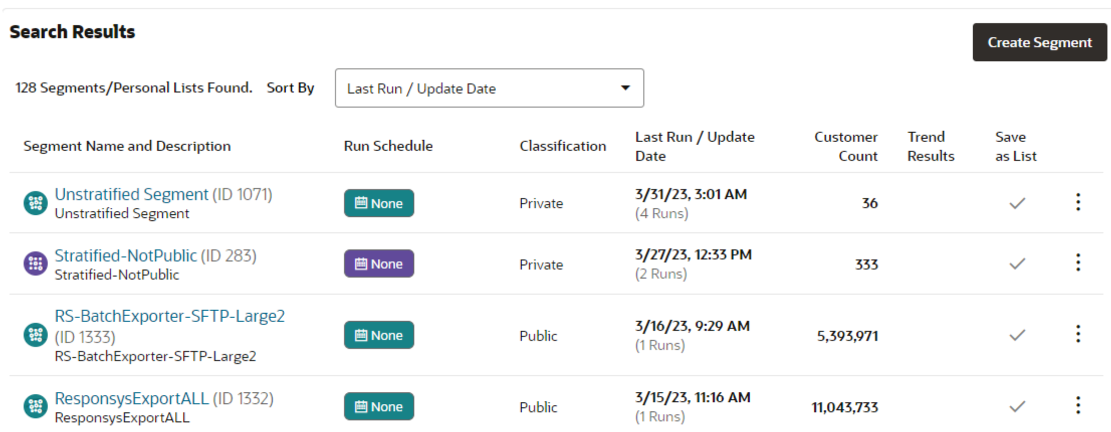
  - All (Default)
  - Yes
  - No
- **Created By** - List of users who have created segments. The default is All. Use this to search for segment types a user personally created.

> **Note:**
>
> Only Public segments can be returned for any user other than the one logged. A user shouldn't be able to see other users private segments unless they are the user's private segments or the user has system admin privileges.

Searching Segments

Once all the desired information has been entered, click **Search** to see the results.

Figure 8-5 Segment Search Results



> **Note:**
>
> Click **Reset** to clear all fields and return list values to the default selections. You can also click **Search** without entering any criteria to see a complete list of Segments and Personal Lists.

Sorting Segment Results

The sort options will re-sort just the current 25 segments displayed in the window. Sorting options include:

- **Last Run / Update Date** - Segment results are sorted by the Last Run (Stratified and Unstratified) or Last Update (Personal Lists) in descending order (Default).
- **Segment ID** - Segment results are sorted by Segment ID in descending order by default.

- **Segment Name** - Segment results are sorted by Segment Name in ascending order.
- **Customer Count** - Segment results are sorted by the Customer Count in descending order
- **Save as List** - Segment results are sorted by Save as List in ascending order.

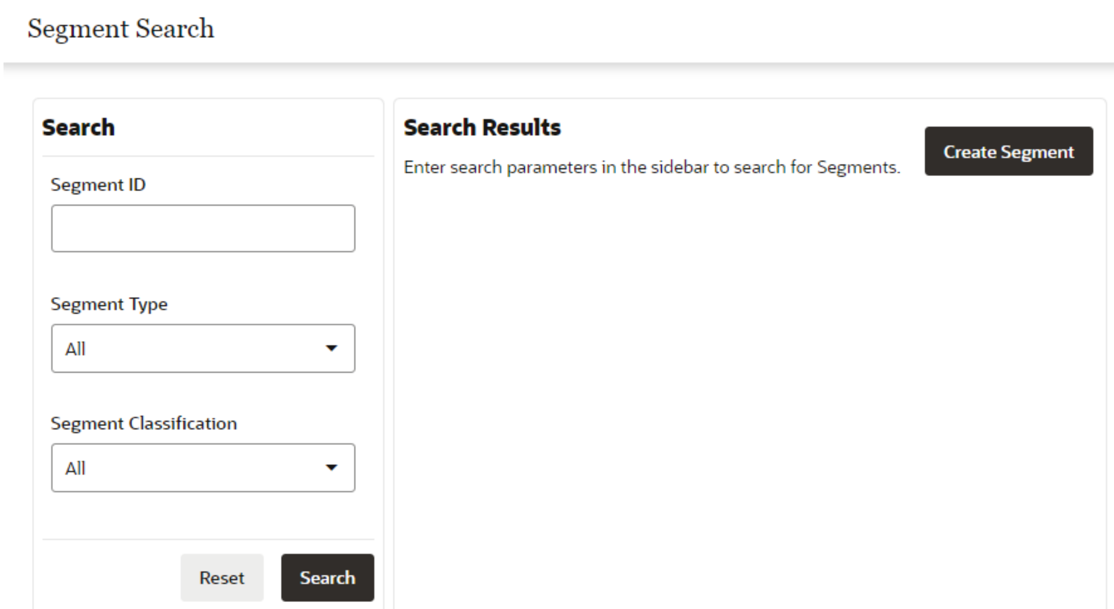
> **Note:**
>
> For Personal Lists, the **Save as List** setting is always Yes, so the sort order does not apply.

Creating a Segment or Personal List

There are a two choices available to start the process of creating a Segment or Personal List. The **Create Segment** button is available in both the Segment Home window as well as the Segment Search window.

Creating a Segment or Personal List - Segment Search

Figure 8-6 Segment Search



To Create a new segment from the Segment Search screen, click the **Create Segment** button, which will open the segment wizard on the Information tab. Proceed to **Step 6** in Creating a Segment or Personal List - Segment Home.

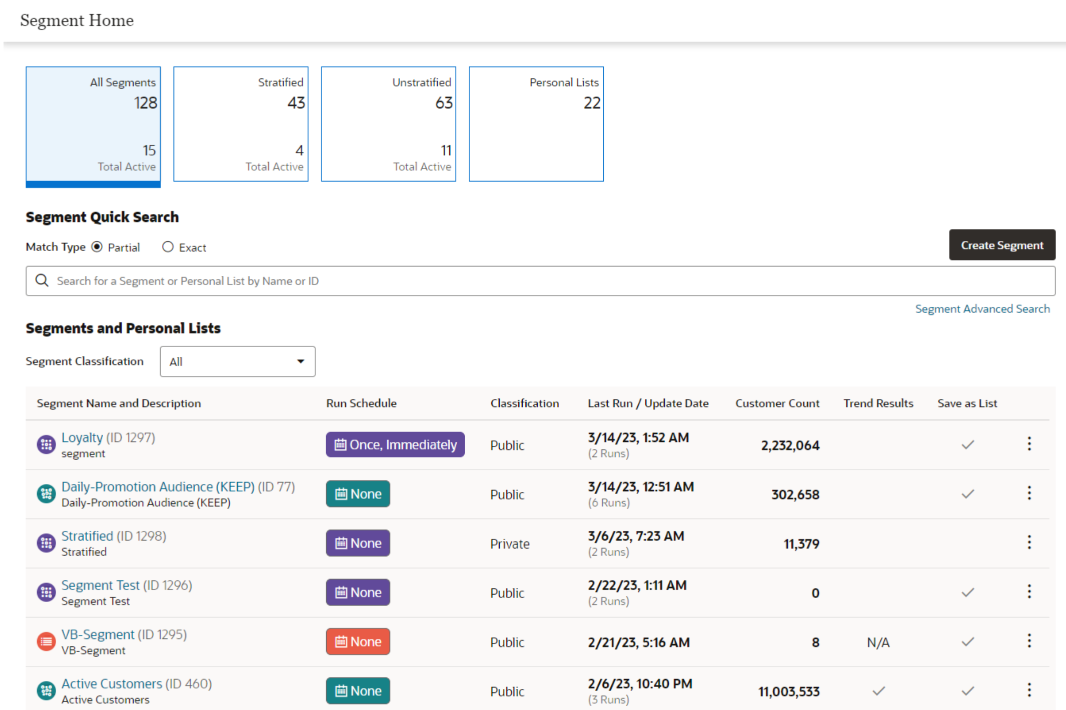
Creating a Segment or Personal List - Segment Home

To create a new Segment or Personal List from the Segment Home window do the following:

1. Click the **Tasks** icon.

2. Click **Segment**.
3. Click **Segment Home**. The All Segments Tile is defaulted.

Figure 8-7 Segment Home



4. There are two options to start the Create process:

   Option 1

   a. With the All Segments Metric tile highlighted, select the Create Segment button which opens the Segment Wizard to the Information tab, with the Stratified Segment type defaulted. You can then change the Segment type, if desired.

   b. Select one of the Metric Tiles (Stratified, Unstratified, or Personal List), and from there select the Create Segment button, which will default that segment type in the Information tab of the segment wizard.

   Option 2

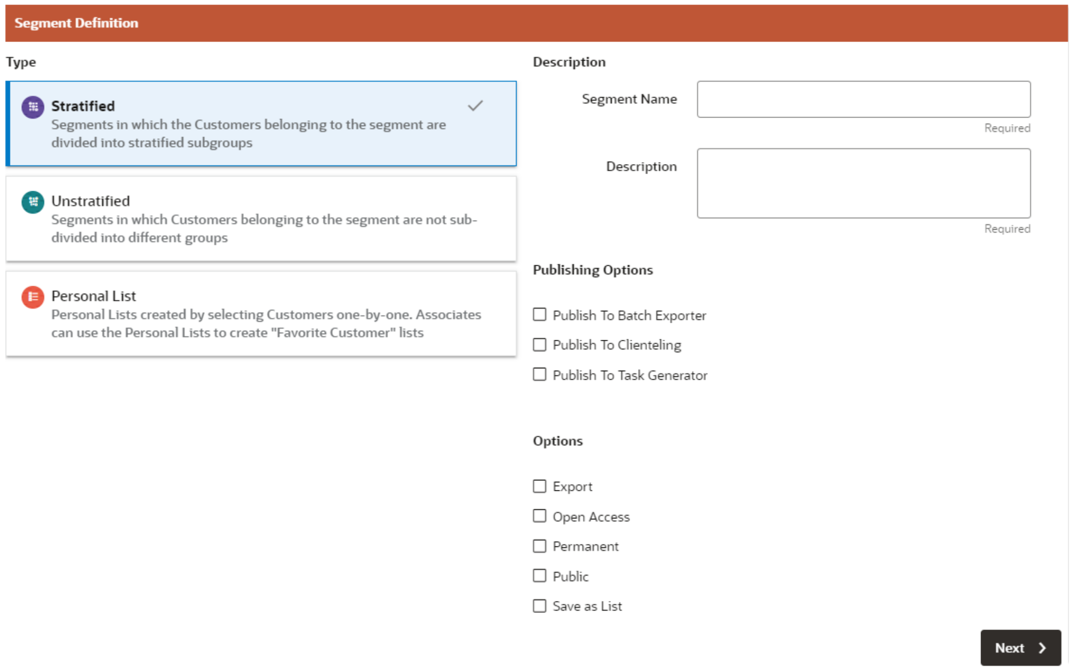
   a. Create a new segment from the Segment Search screen: Select the Create Segment button, which will open the segment wizard on the Information tab.

5. Click **Create Segment**. The Create Segment wizard may contain any of the following tabs, depending on configuration and the selected Segment Type.
   - Information
   - Franchisees
   - Segment Query
   - Stratification
   - Message
   - Strata Query
   - Attributes

- Segment Members
- Schedule
- Review

6. Enter the following items for the Information Tab:

Figure 8-8 Information Tab



> **Note:**
>
> The read-only Segment Information Panel displays details throughout most of the tabs of the wizard.

- **Type** - Select the type of Segment from the available options:
  - **Stratified** - Segments in which the Customers belonging to the segment are divided into stratified subgroups.
  - **Unstratified** - Segments in which Customers belonging to the segment are not subdivided into different groups.
  - **Personal List** - Personal Lists created by selecting Customers one-by-one. Associates can use the Personal Lists to create "Favorite Customer" lists.
- **Description**
  - **Segment Name** - The name of the Segment (Required).
  - **Description** - Any Segment specific additional description (Required).
- **Publishing Options**

- **Publish To Batch Exporter** - Determines whether or not the Segment is available to export to a Marketing system.

> **Note:**
>
> If the Publish to Batch Exporter option is selected, the following options are automatically checked: **Export**, **Permanent**, **Public**, and **Save as List**. All other check boxes are unchecked and unavailable.

- **Publish To Clienteling** - Determines whether or not the Segment is available to the Clienteling module.

> **Note:**
>
> If the Publish to Clienteling option is selected, the following options are automatically checked: **Permanent**, **Public**, and **Save as List**. All other check boxes are unchecked and unavailable.
>
> A User must be assigned the Publish Clienteling Segment Role to see this option. See the *Oracle Retail Customer Engagement Implementation Guide* for more information about Roles.

- **Publish to Task Generator** - Determines whether tasks are created for this Segment.

> **Note:**
>
> If the Publish to Task Generator option is selected, the following options are automatically checked: **Export**, **Permanent**, and **Save as List**. All other check boxes are unchecked and unavailable.
>
> A User must be assigned the Task Manager Role to see this option. See the *Oracle Retail Customer Engagement Implementation Guide* for more information about Roles.

- **Options**
  - **Export** - Determines whether or not the Segment results are automatically exported after the Segment Query is run. The Export option is not available for Personal Lists.

> **Note:**
>
> If the Export option is selected, **Save as List** is automatically checked and the **Export** and **Trend Results?** check boxes are unavailable.

  - **Open Access** - Determines whether or not the Segment has Open Access.

> **Note:**
>
> If the Open Access option is selected, **Permanent**, **Public**, and **Save as List**, are automatically checked and the check boxes are unavailable; **Export** and **Trend Results?** are automatically unchecked and the check boxes are unavailable.

- **Permanent** - Determines whether or not the Segment is kept, even if it meets the criteria for deletion by the housekeeping job.
- **Public** - Determines whether or not the Segment is Public.
- **Save as List** - Determines whether a List of matching Customer IDs are created when the segment is created. If this option is not checked, the Segment will only create a count of the Customers that meet the criteria.
- **Trend Results?** - Determines whether the results of the Segment run are kept to provide trend information about the Segment.

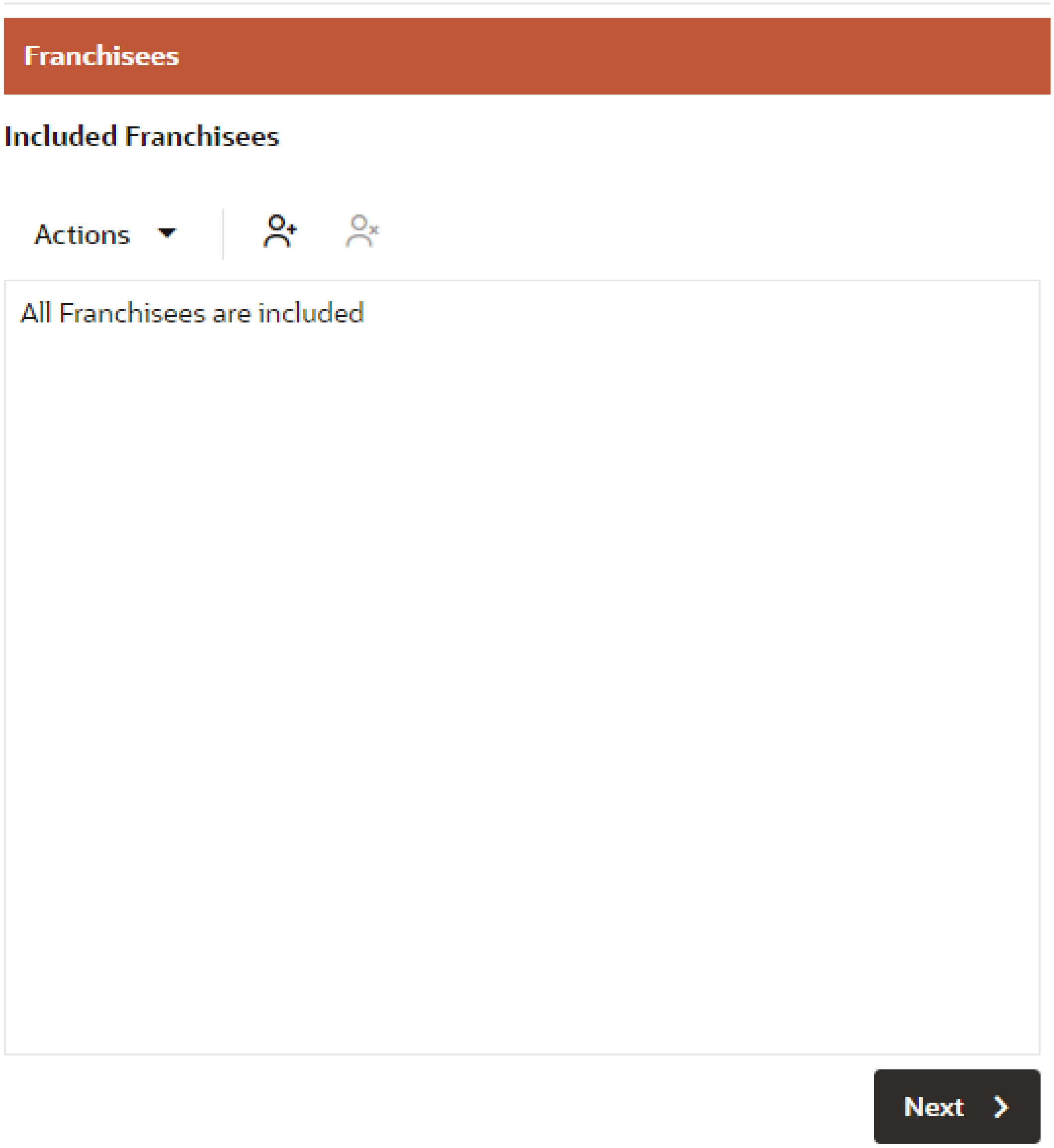
7. When finished entering the Segment information on the Information tab, click **Next** to continue to the **Franchisees** tab.

   The Franchisees Assignment tab allows you to add or change the Franchisees you wish to assign to the segment.

   > **Note:**
   >
   > The Franchisee tab will only be visible if the `EnableFranchiseSupport` configuration is enabled, and Franchisees are defined. By default, all franchisees are included on the Segment. If you are assigned to specific franchisees, only those franchisees you are associated to are shown.

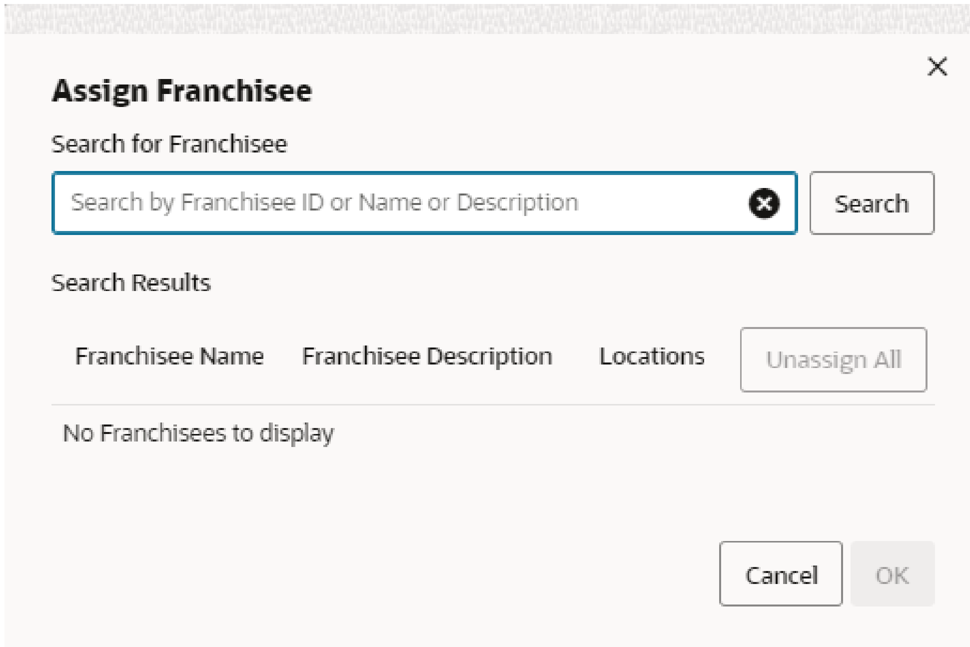
   - If Franchisees are enabled in Customer Engagement, the Franchisees Tab appears. Proceed to **Step** 8.
   - If Franchisees are not enabled in Customer Engagement and the Segment Type is **Stratified** or **Unstratified**, the Segment Query tab appears. Proceed to **Step** 10.
   - If Franchisees are not enabled in Customer Engagement and the Segment Type is **Personal List**, the Attributes Tab appears. Proceed to **Step** 18.

Figure 8-9 Franchisee Tab



8. To assign a Franchisee:
   - Assigning a Franchisee
     – Click the **Action Menu**, and click **Assign**, or click the **Add (+)** icon. This opens the Assign Franchisee window.

Figure 8-10 Assign Franchisee



- By default, all franchisees are assigned to the segment. To make changes to those assignments, you can search for specific franchisees by entering all or part the franchisee **Name**, **ID**, or **Description**. Click **Search** in the Search for Franchisee search box.

  > **Note:**
  >
  > You also have the option to enter no search criteria and click **Search** to retrieve all available franchisees from which to select for assignment.

- In the Included Franchisees results list, click **Assign All** to assign all the search results, or click **Assign** for a specific franchisee to add to the segment.
- Click **OK** to accept the changes or **Cancel** to close the window without saving.

> **Note:**
>
> A confirmation notification appears to confirm the Franchisees has been assigned.
>
> After a Franchisee is assigned, it appears at the top of the list. The rest of the Franchisees are ordered by ID.

Figure 8-11 Confirmation Notification

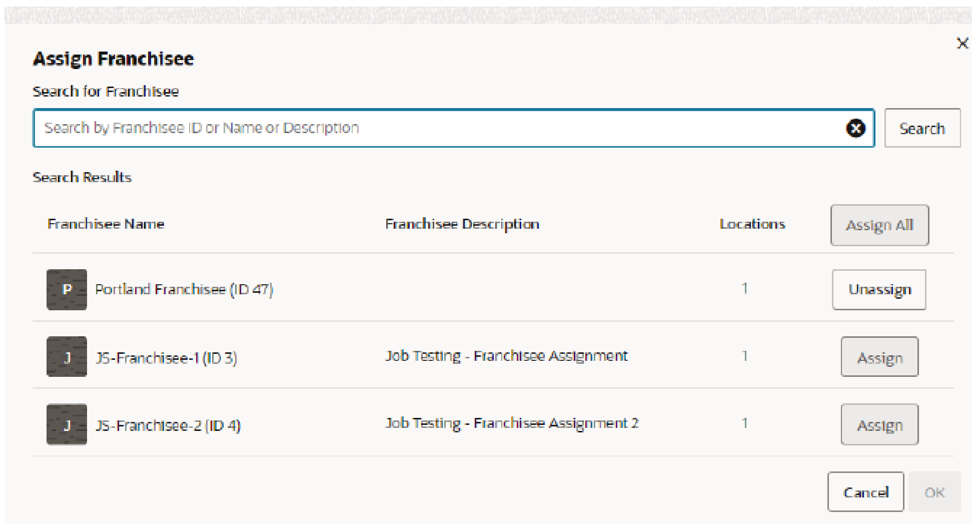
- Unassigning a Franchisee

  If you need to, there are two ways to unassign any of the assigned franchisees on the segment.

  – In the Assign Franchisee window, click **Unassign** on any Franchisees currently assigned to the segment. Then click **OK** to accept the changes or **Cancel** to close the window without saving.

  – If Franchisees are listed on the Franchisee tab in the Included Franchisees table, highlight the **row**, and then select the **Action Menu**, and click **Unassign**, or click the **Unassign X** icon to remove the associated Franchisee.

Figure 8-12 Assign Franchisee (Using the Unassign Button)



> **Note:**
>
> A confirmation notification appears that confirms the Franchisees are deleted.

Figure 8-13 Confirmation Notification

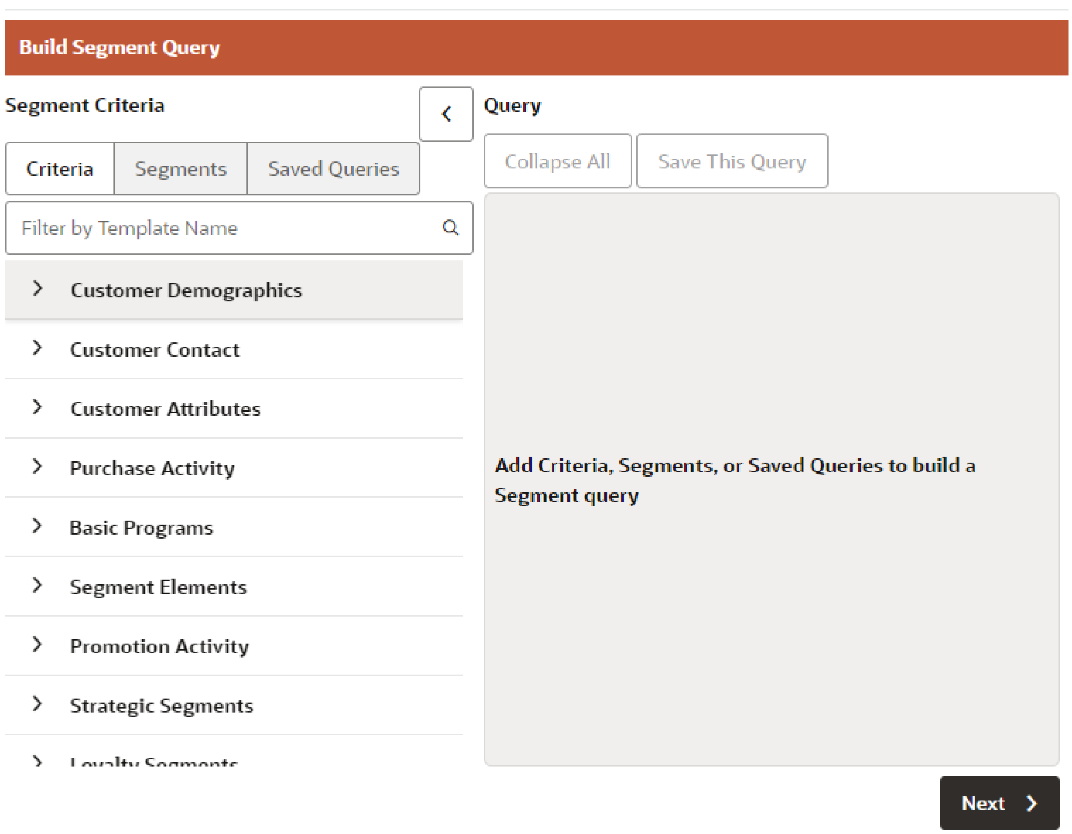
9. When finished selecting the franchises on the Franchisee tab, click **Next** to continue to the next tab.
   a. If the Segment Type is **Stratified** or **Unstratified**, proceed to **Step 10**.
   b. If the Segment Type is **Personal List**, proceed to **Step 18**.
10. The Segment Query tab, used for **Stratified** or **Unstratified** segments, provides three choices to populate the Query window. They include:
    - Criteria

- Segments
- Saved Queries

> **Note:**
>
> The My Saved queries are private to the user that created the query or the system administrator.

> **Note:**
>
> The query window can be populated singularly, or by using any combination of the three choices previously listed.

Figure 8-14 Build Segment Query



Building the Query

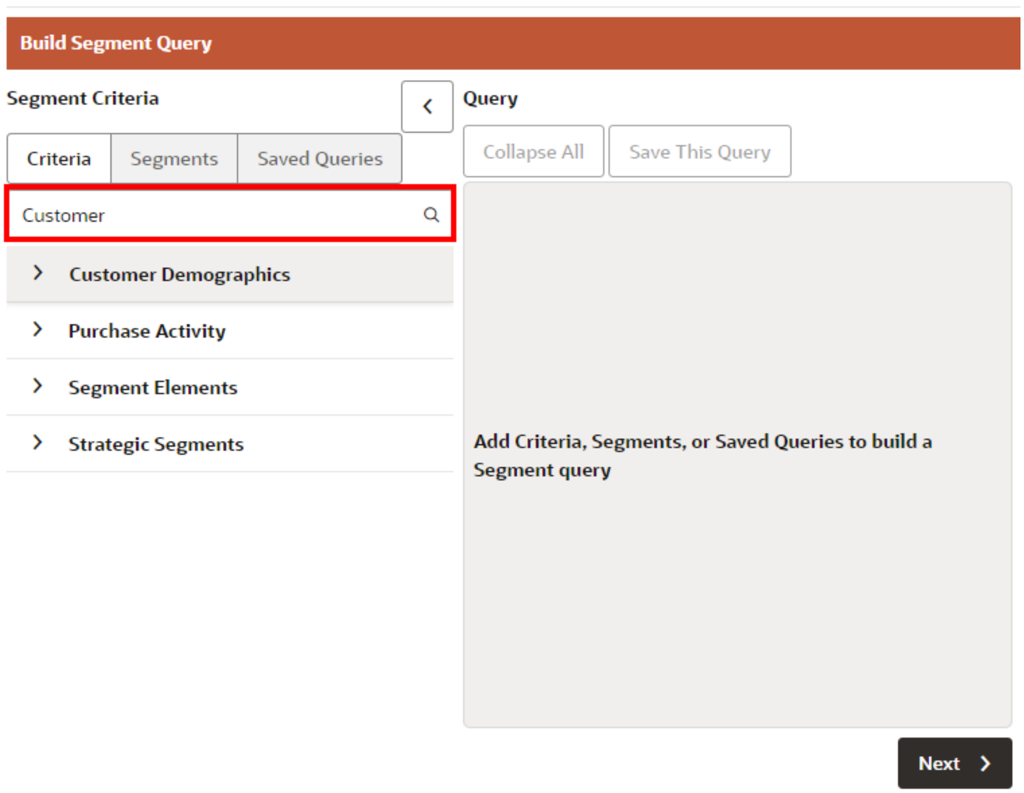
a. To start the query criteria selection, you can either filter by Template name or you can select one of the Templates shown to expand the criteria selections.

> **Note:**
>
> The following steps also apply when selecting Segments, or My Saved Queries in **Step 10.a**

b. To filter by **Template Name**: In the Filter by Name box, enter part or all of a Template Name

   Press **Enter**, or click the **Search** icon.

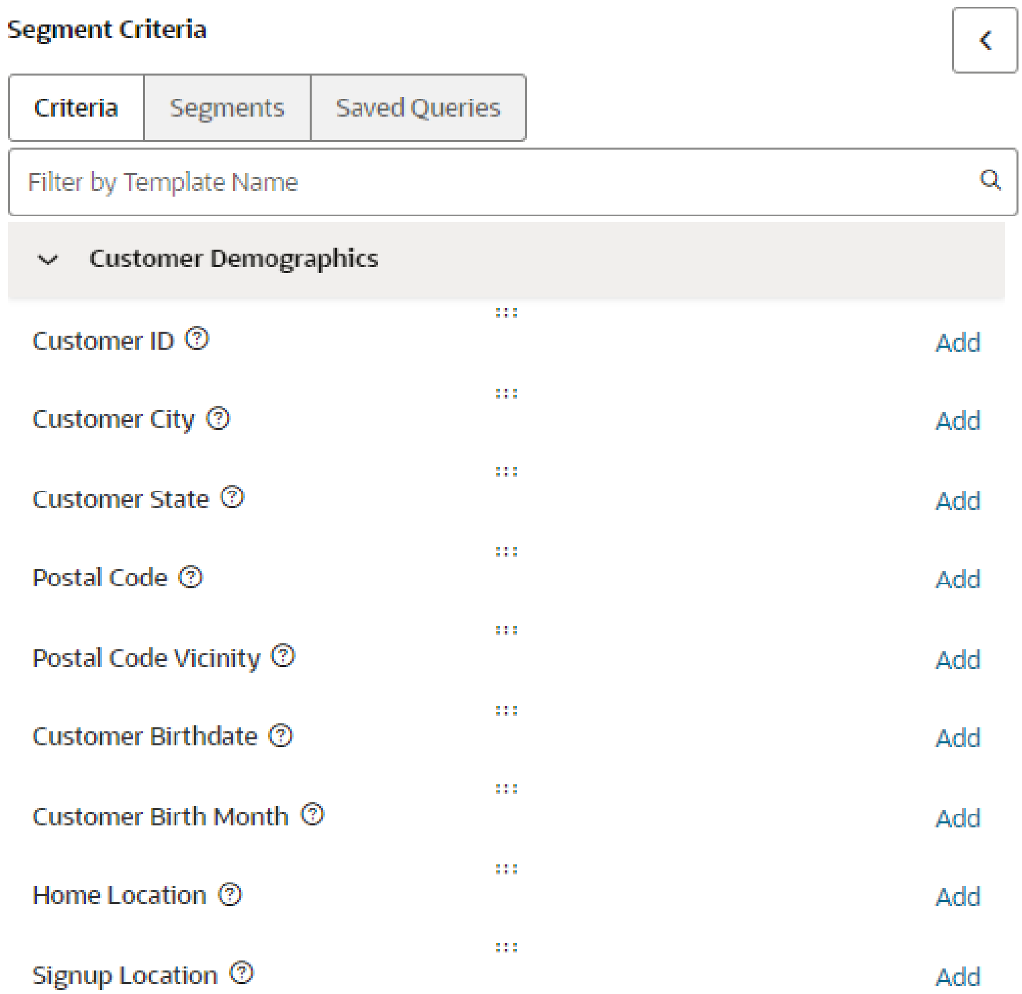
Figure 8-15 Criteria - Filtered



> **Note:**
>
> To see the available criteria in your filtered list, expand the Template to see the available choices from which to select.
>
> To **reset** the filter, highlight the words and press **Delete**. Then press **Enter**, or click the **Search** icon.

c. In the Template selection list, click a template group to expand its list of query criteria options. See Segment Queries for more information about criteria group organization.

Figure 8-16 Expanded Criteria List



d. Click the **Add** link, or drag and drop the **Criteria Name** into the Query window.

Figure 8-17 Adding Criteria to Query

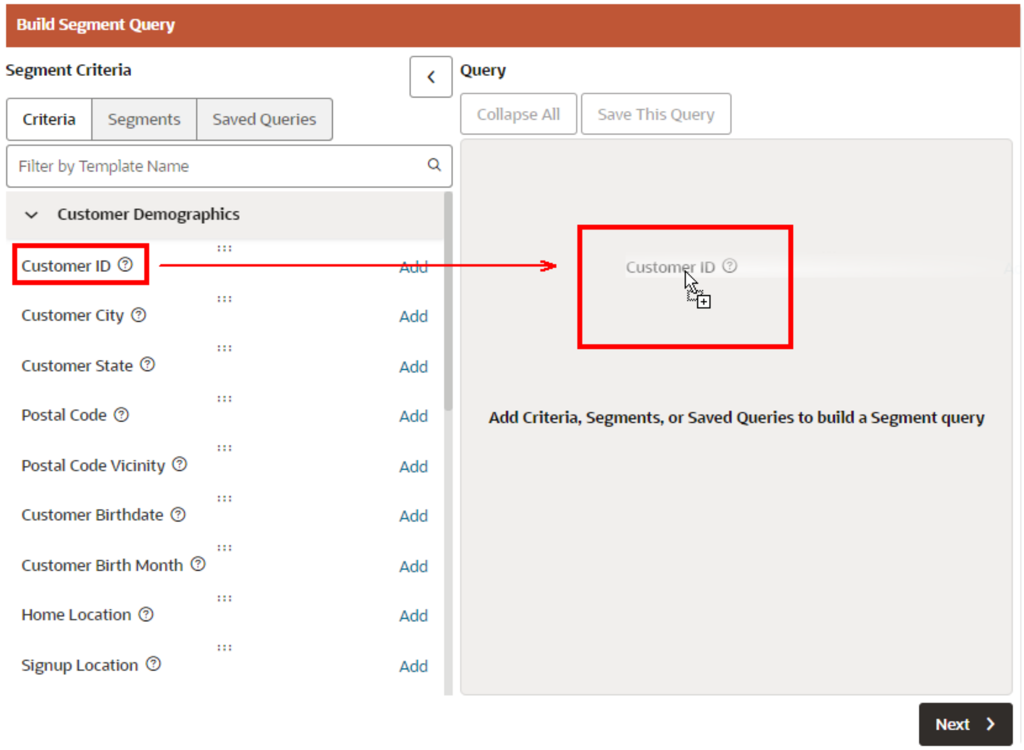
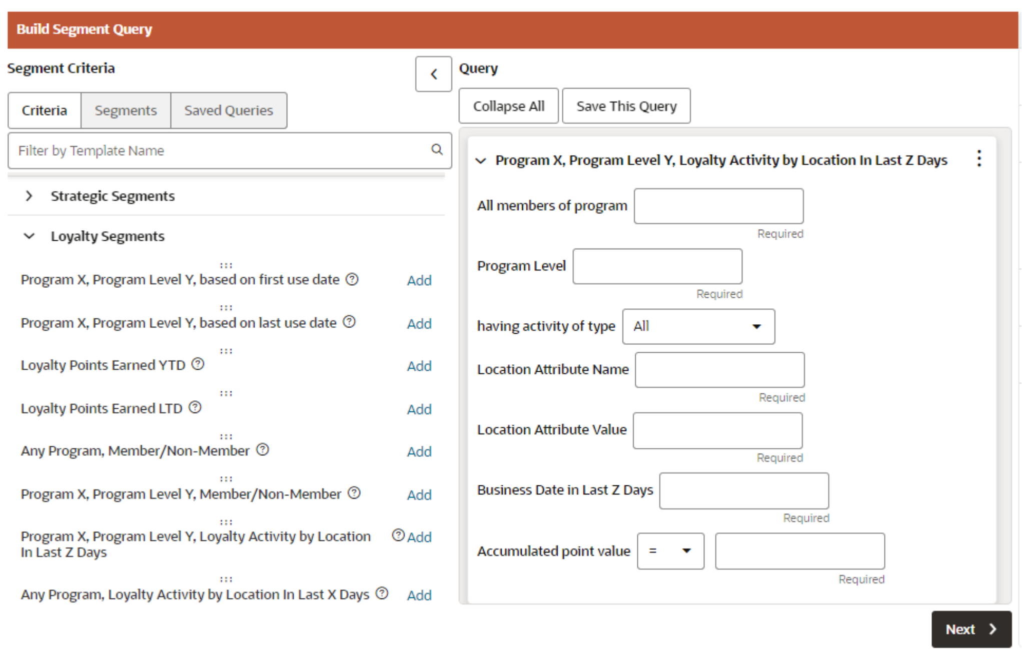


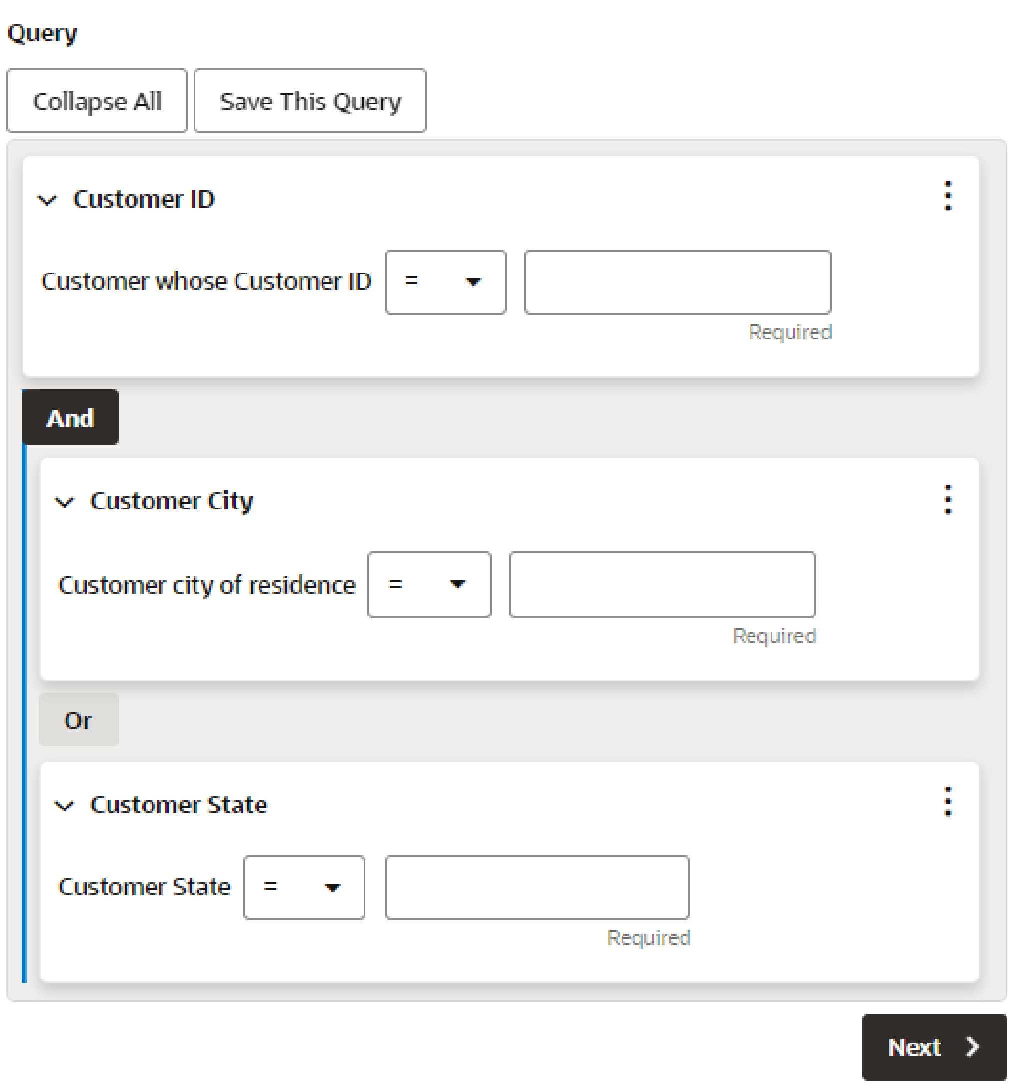
Figure 8-18 Added Criteria



e. Repeat the previous step until all criteria are added.

> **Note:**
>
> As shown in **Figure Figure 8-19**, the logical conditions **And** and **Or** appear between each of the criteria.

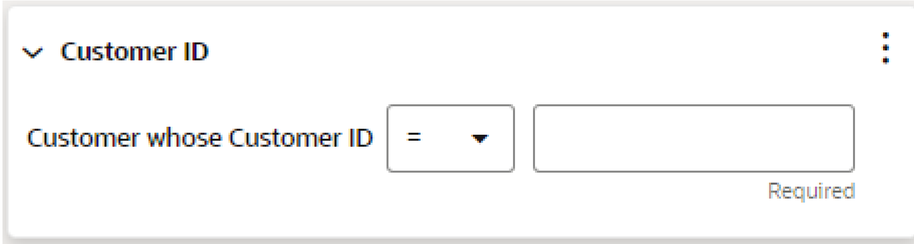
Figure 8-19 Query Window



f. To change the logical conditions, click either **And** or **Or** to switch between the two options.

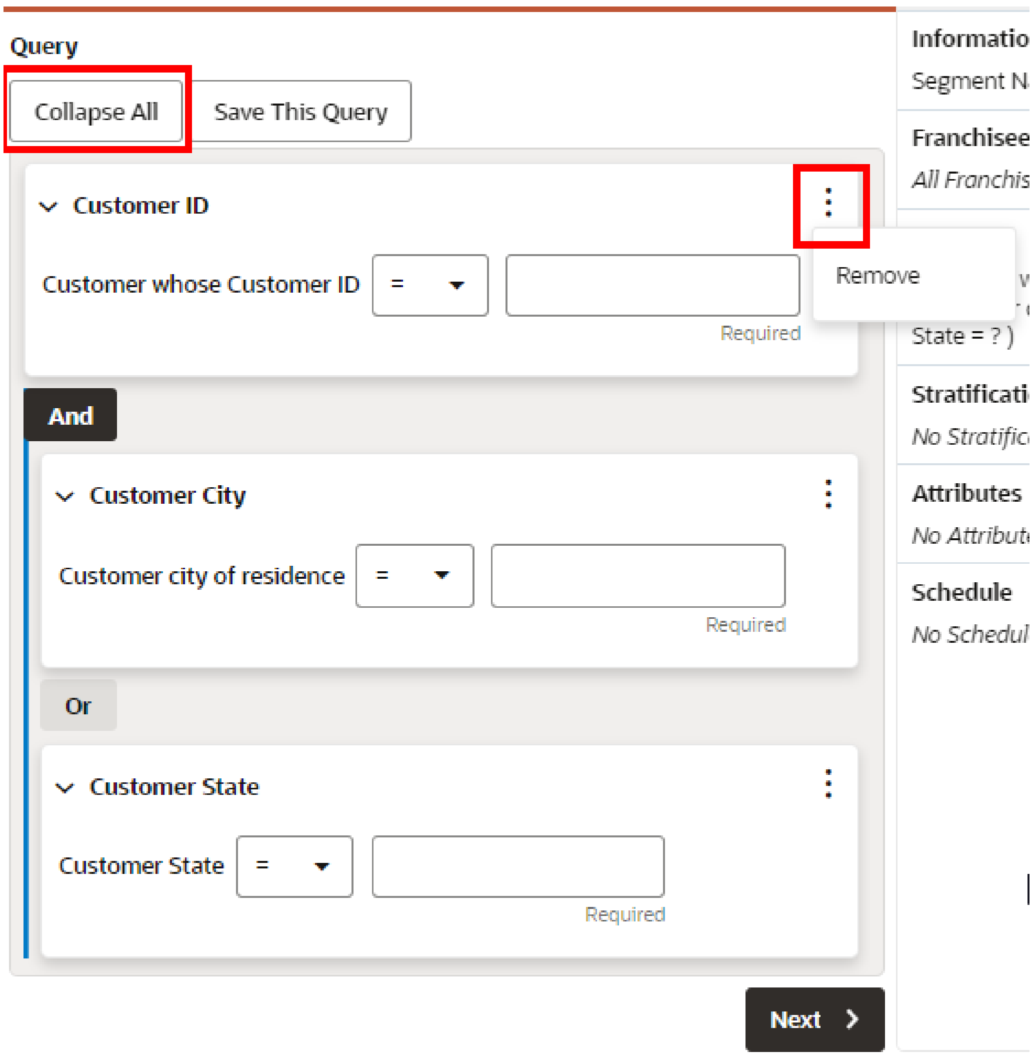
> **Note:**
>
> If you use **And**, a record will only be included in the node if it matches all of the criteria in the subnodes. If you use **Or**, a record is included in the node if it matches any of the criteria in the subnodes.

Figure 8-20 Criteria



g. Enter the **Search Criteria** into the appropriate fields. See Segment Queries for more information about criteria fields.

Figure 8-21 Query Options

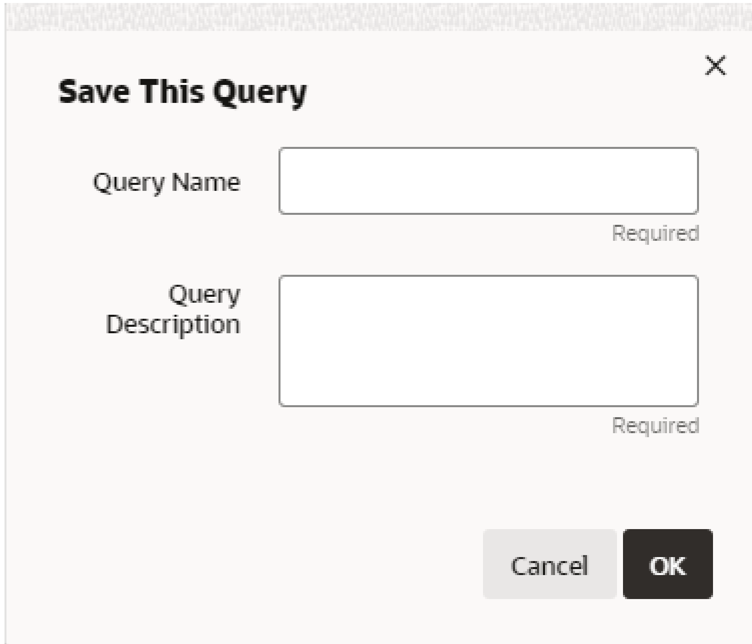


h. After entering the search criteria you can collapse or expand the details at any time. To collapse a criteria in the list, click the arrow next to each criteria. To change all criteria at once, click **Collapse All**/**Expand All** to **Collapse**/**Expand**.

i. When you need to clear a criteria from the query, click the **Action Menu** and then click **Remove**.

j. **Optional:** Any Query can be saved for use in other Build Segment Queries, by doing the following: Click **Save this Query**. The Save this Query window appears.

Figure 8-22 Save This Query



k. Type a **Query Name**.

l. Type a **Query Description**.

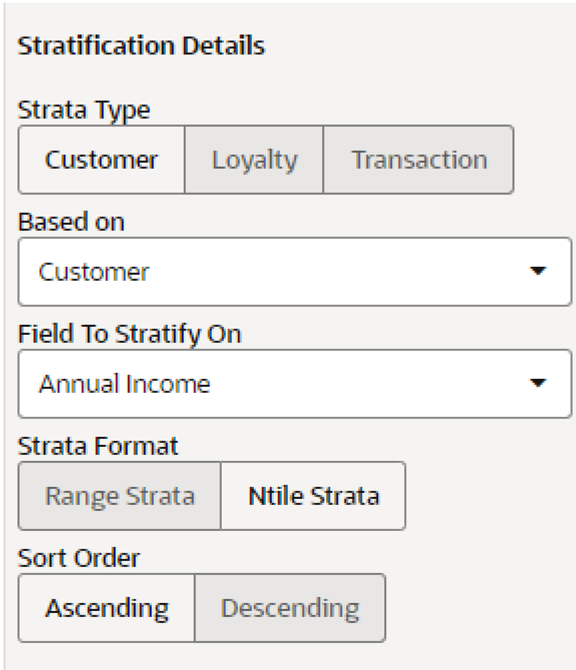
m. Click **OK**. The query is saved for use with other Segments/Personal Lists. See **Step 10** for information on how to access Saved Queries.

11. When finished building a query on the **Segment Query** tab, click **Next**.
    - If the Segment Type is **Stratified**, proceed to **Step 12**.
    - If the Segment Type is **Unstratified**, proceed to **Step 18,** the Attributes tab.
12. Enter the following for the Stratification tab.

    Stratification Details (Select One)

> **Note:**
>
> The **Based on** and **Field to Stratify On** fields are dynamic and their options are based on the Strata Type selected.

Figure 8-23 Stratification Details



- Select the Strata Type: **Customer** - Customer Data
  – Based on: Customer (Default) - Field to Stratify On options include:

Field	Description
Annual Income	Customer's Annual Income
Customer Net Worth	Customer's Net Worth
Lifetime Sales	Lifetime total amount of all sales made to the Customer.
Lifetime Returns	Lifetime total amount of all returns made by the Customer.
Lifetime Transaction Count	Lifetime total number of transactions.
Lifetime Sold Item Count	Lifetime total number of items sold
Lifetime Return Item Count	Lifetime total number of items returned.
Lifetime Profit Percent	Lifetime percentage of profit on all Customer transactions.
YTD Sales	Total amount of all sales during the year to date.
YTD Returns	Total amount of all returns during the year to date.
YTD Trans Count	Total number of transactions during the year to date.
YTD Sold Item Count	Total number of items sold during the year to date.
YTD Return Item Count	Total number of items returned during the year to date.
YTD Profit Percent	Percentage of profit on all Customer transactions during the year to date.
Customer Age	Age of the Customer.
Days Since Purchase	Number of days since the Customer's last purchase.
Attributes	Attribute values.

- Select the Strata Type: **Loyalty** - Loyalty Account Information

  - Based on: **Loyalty Summary** - Field to Stratify On options include:

Field	Description
Earned Points Balance	Current balance of earned points.
YTD Points	Total number of points earned during the year to date.
LTD Points	Total number of points earned over the lifetime of the Loyalty Account.

  - Based on: **Loyalty Detail** - Field to Stratify On options include:

Field	Description
Sum Number of Points	Total number of points in the Loyalty Account.
Count Number of Transactions	Total number of Loyalty transactions.
Days Since Last Activity	Days since the last Loyalty transaction.

- Select the Strata Type: **Transaction** - Transaction Information
  - Based on: **Header** - Field to Stratify On options include:

Field	Descriptions
Sum of Transaction Amount	Total amount of all transactions.
Number of Transactions	Total number of transactions.
Days Since Purchase	Number of days since the last purchase transaction.

  - **Detail**: - Field to Stratify On options include:

Field	Description
Sum of Line Item	Sum of all line items in all transactions.
Days Since Purchase	Number of days since the last purchase transaction.
Sold Item Count	Total number of items sold.
Transaction Count	Total number of transactions.

- Select a Strata Format
  - **Range Strata** - Strata are determined by configured ranges.
  - **Ntile Strata** - Strata are placed into equally-sized groups of Customers.

    Select the **Sort Order** for Ntile Strata:

    - **Ascending** - The Strata having the lowest values are displayed first.

    - **Descending** - The Strata having the greatest values are displayed first.

Figure 8-24 Strata Levels

Strata Levels

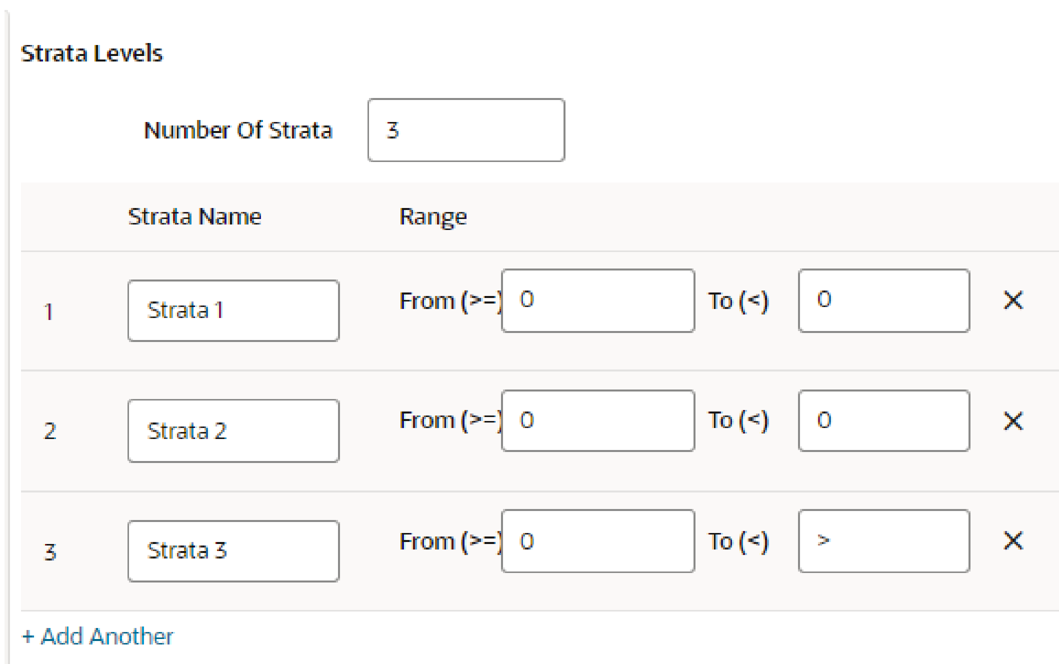
The default number of strata levels is three. You can increase or decrease the number of strata levels.

- There are twp ways to increase the number of Strata Levels
  - Number of Strata: Enter a **numeric value** and press **Enter**.
  - Click the **+ Add Another** link.

Figure 8-25 Strata Levels - Ntile Strata

- Enter a **Strata Name** for each Strata Level
- Click the **Delete** icon to remove a Strata Level.

Figure 8-26 Strata Levels - Range Strata



Strata Levels - Range Strata

- Enter a **Strata Name** for each Strata in the Segment.

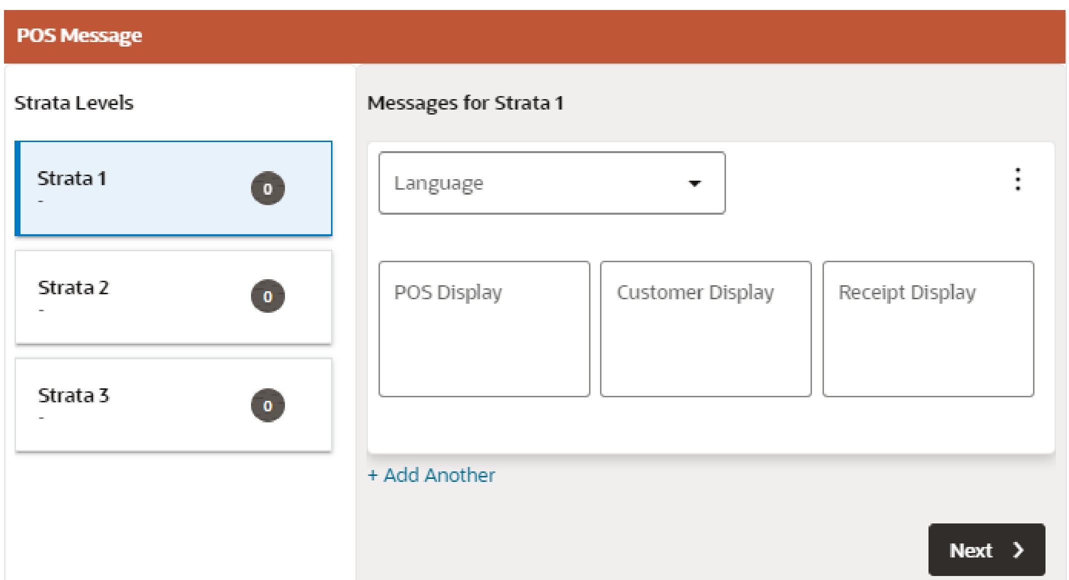
- In the Range From (>=) fields, enter the **minimum value** of each Strata.

  If the Strata Field value for the Customer equals this value, it isincluded in this Strata.
- In the Range To fields, enter the **maximum value** of each Strata.

  If the Strata Field value equals this value, it is not included in this Strata.

13. When finished entering Stratification Details click **Next**.
    - If the Open Access Check Box was checked in the Information tab (see **Step 6** Options), the Message tab displays. Proceed to **Step 14**.
    - If the **Open Access** check box was **unchecked** in the Information tab (see **Step 6** Options), and the Strata Type: Customer was selected in Stratification Details (see **Step 12**), the Attributes Tab displays. Proceed to **Step 18**.
    - If the **Open Access** check box was **unchecked** in the Information tab (see **Step 16** Options), and the Strata Type: Loyalty or Transaction was selected in Stratification Details (see **Step 12**), the Strata Query tab displays. Proceed to **Step 16**.
14. The Message tab enables you to a add message for displaying at the Point-of-Sale for a Customer or Receipt display for upselling or other marketing campaigns. Enter the following for the **Message** tab:

Figure 8-27 POS Message



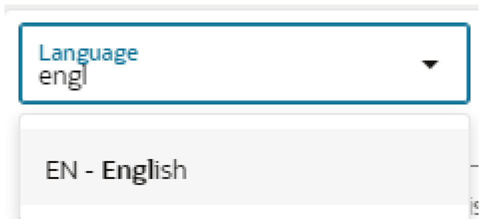
a. Highlight a **Strata Level**.

b. In the Messages for Strata # section where # represents a number, select a **Language** from the options list.

> **Note:**
>
> A language code can only be used once, per strata.

> **Note:**
>
> You can also enter part or all of a **Language Name** or **Language Code** in the Language selection menu. Click the desired **language** from the list of results.

Figure 8-28 Language Selection Menu



c. In the POS Display Text Area field, enter the **text** that will be displayed to the associate using the Point-of-Sale system.

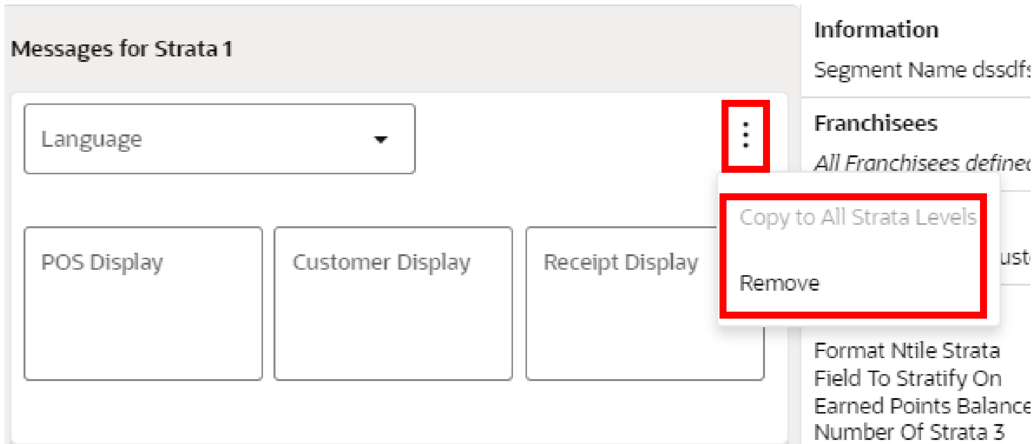
d. In the Customer Display Text Area field, enter the **text** that will be shown on the customer-facing display and, depending on the configuration of the POS system, the signature capture device, while the transaction is being performed.

e. In the Receipt Display Text Area field, enter the **text** that will be printed on the customer receipt.

> **Note:**
>
> For the POS, Customer, and Receipt Display messages, only one is required to have content. You can enter values in each.

> **Note:**
>
> The Actions menu for the messages enable you to **Remove** a Strata Message or **Copy** the message to all Strata Levels.

Figure 8-29 Messages For Strata Actions Menu Options



f. Optional: Click **+Add Another** to add an additional message in a different language to the Strata Level.

g. Repeat **Steps 14 a - f** for each Strata Level.

15. When finished entering all Strata Level messages on the **Message** tab, click **Next**.
    - If the Strata Type: Customer was selected in Stratification Details (**see Step 12**), continue to **Step 18**, the Attributes tab.
    - If the Strata Type: Loyalty or Transaction was selected in Stratification Details (**see Step 12**), the Strata Query tab displays. Proceed to **Step 16**, the Strata Query tab.
16. The Build Strata Query appears when one of the following conditions from **Step 12** are met:
    - Stratification Details: Loyalty
    - Stratification Details: Transaction
    - Stratification Details: Customer and Field To Stratify On = Attributes

Figure 8-30 Build Strata Query: Loyalty Criteria

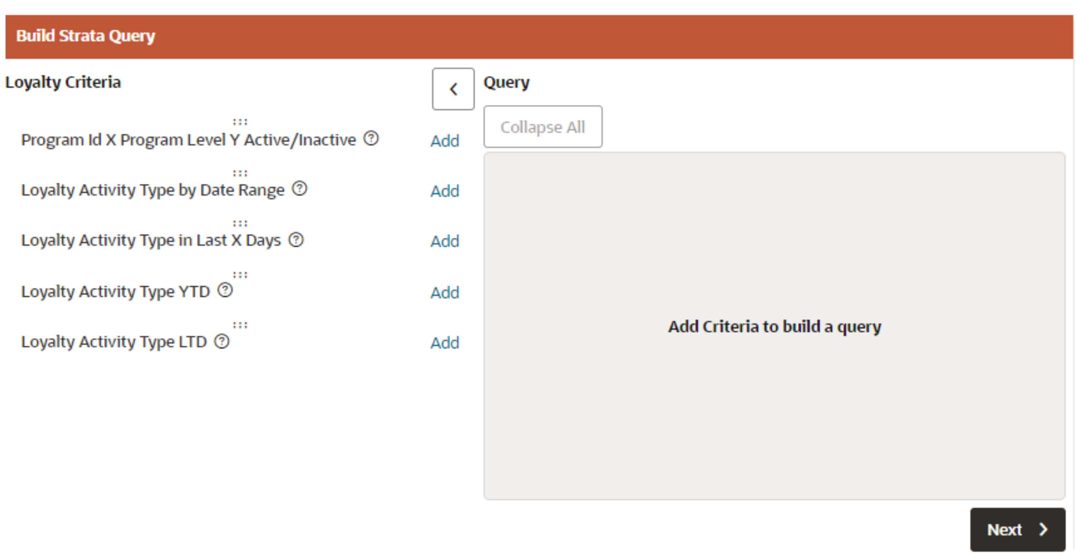


Figure 8-31 Build Strata Query: Transaction

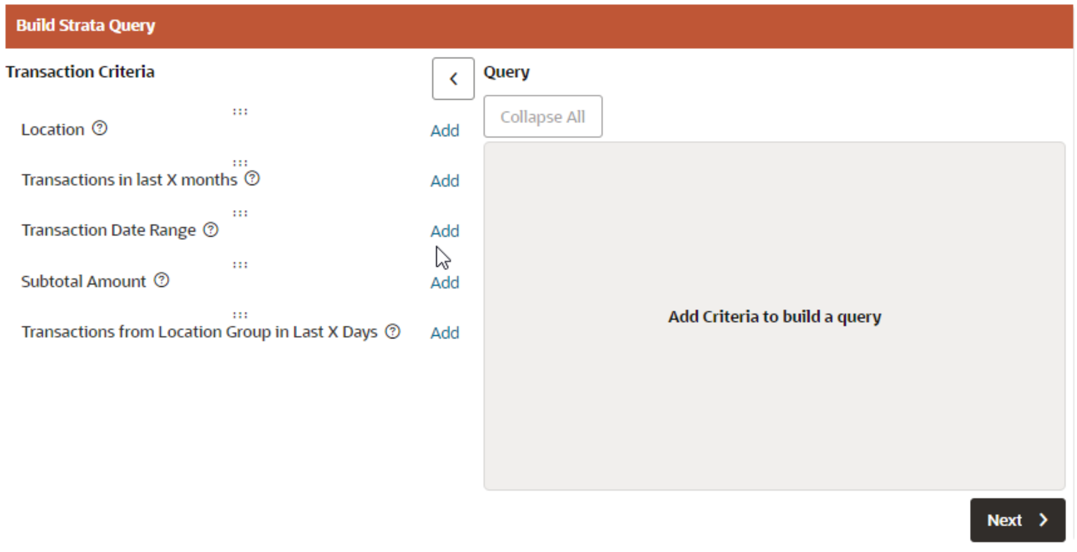
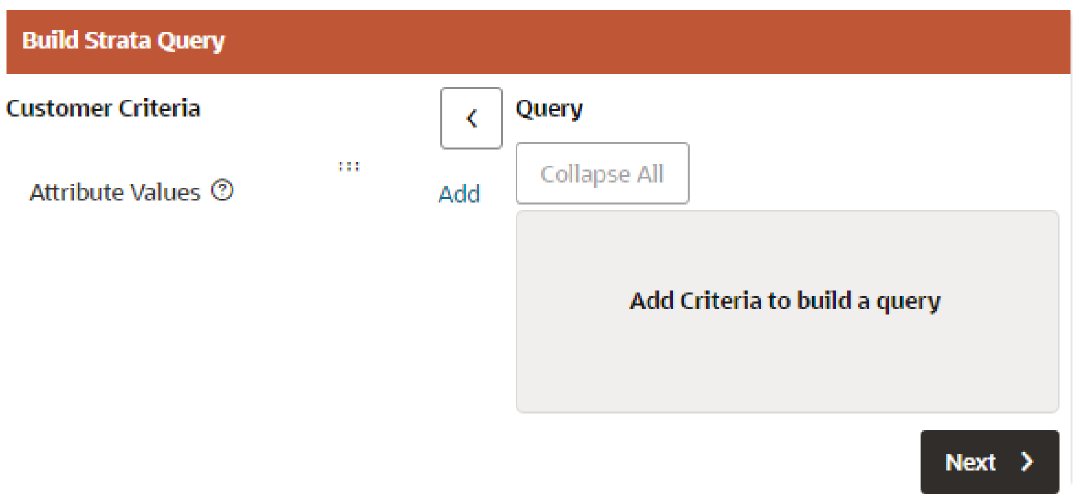


Figure 8-32 Build Strata Query: Customer - Attributes



The following steps work for any of the preceding Build Strata Query options.

a. Click the **Add** link, or drag and drop the **Criteria Name** into the Query window.

Figure 8-33 Adding Criteria to Query

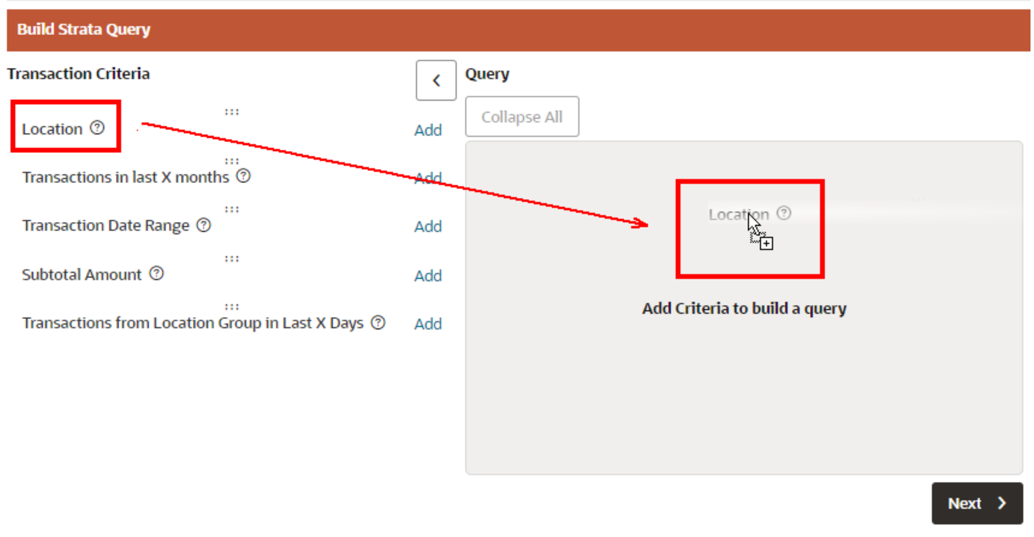
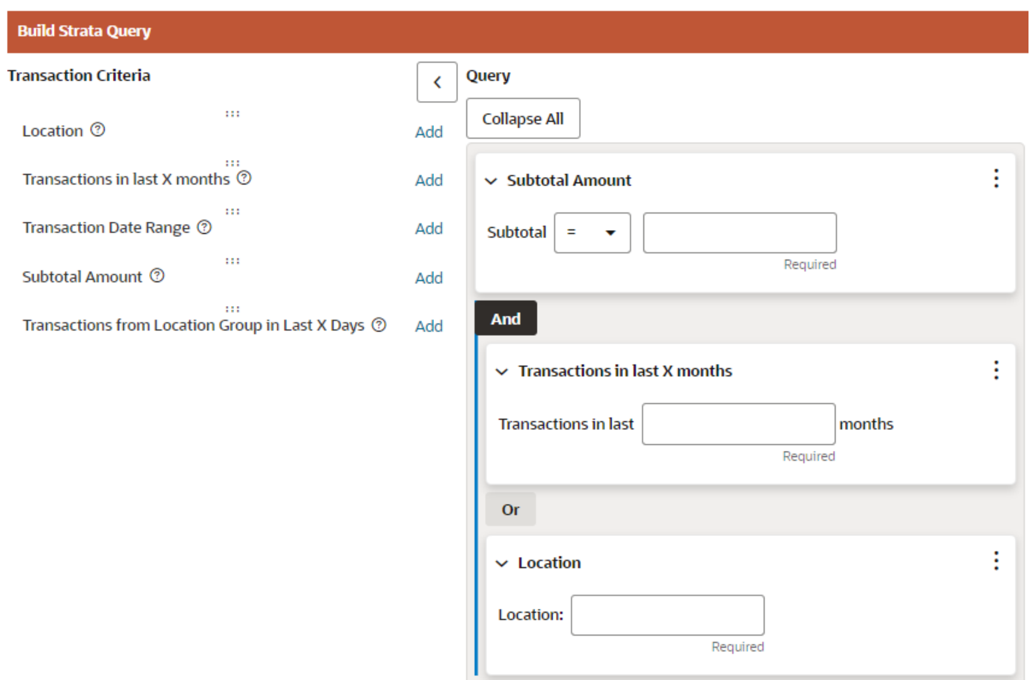


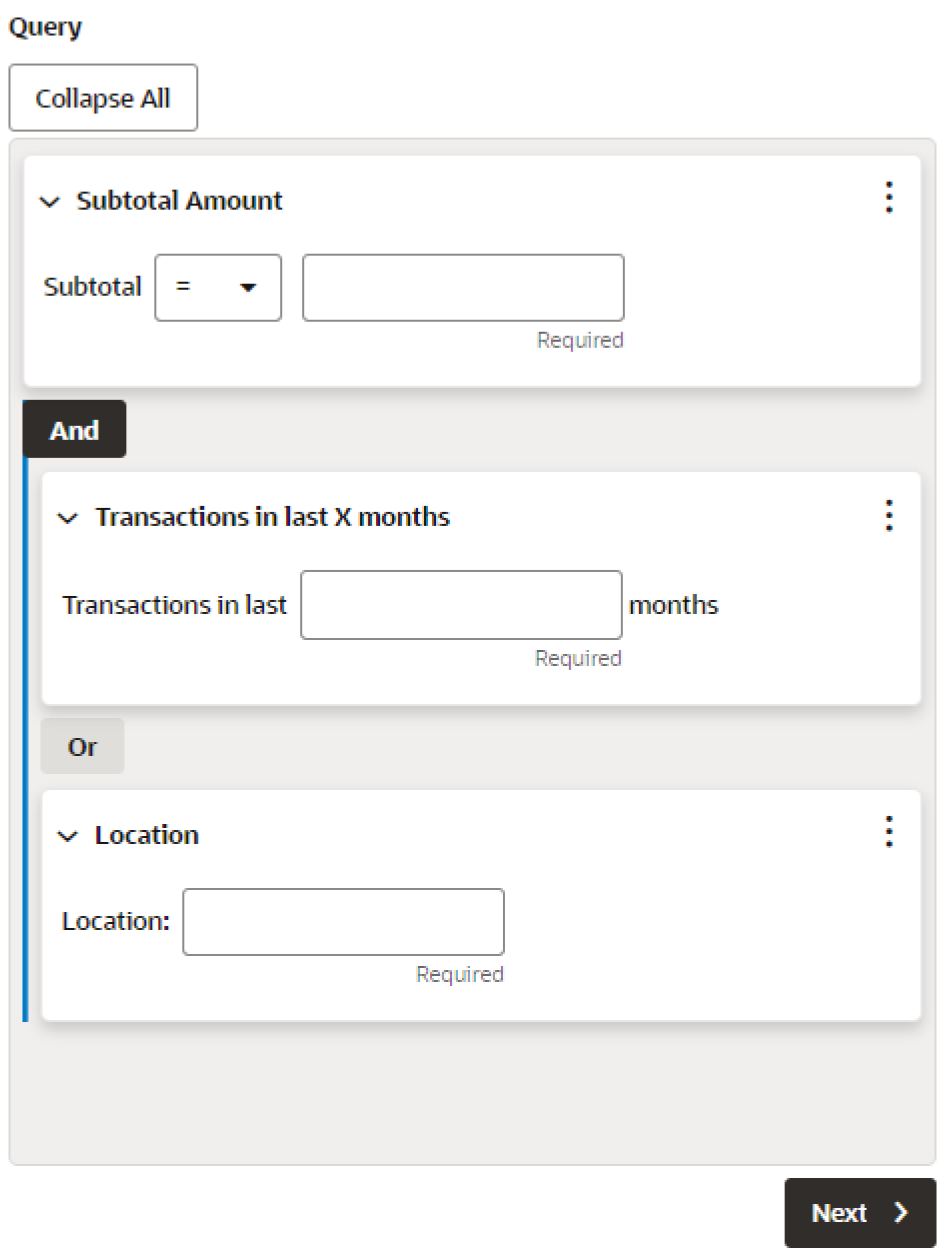
Figure 8-34 Criteria Added



b. Repeat **Step 16.a** until all criteria are added.

> **Note:**
>
> As shown in Figure Figure 8-35, the logical conditions **And** and **Or** appears between each of the criteria.

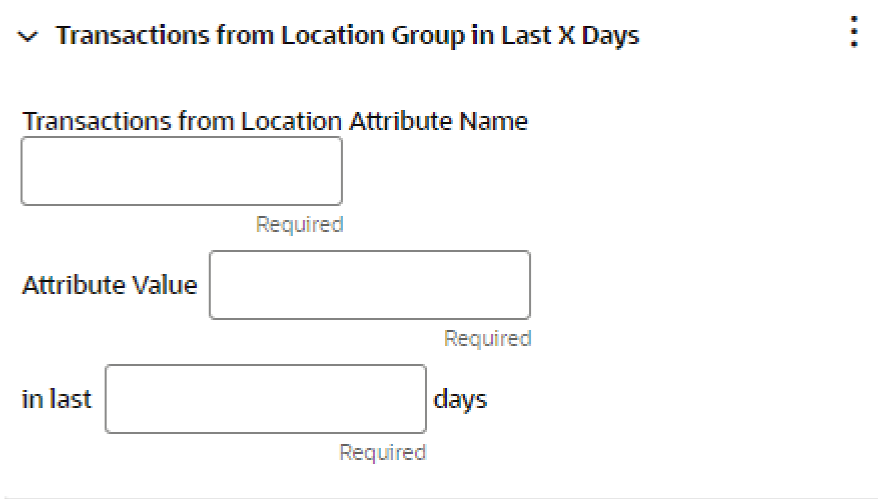
Figure 8-35 Query Window



c. To change the logical conditions, click either **And** or **Or** to switch between the two options.

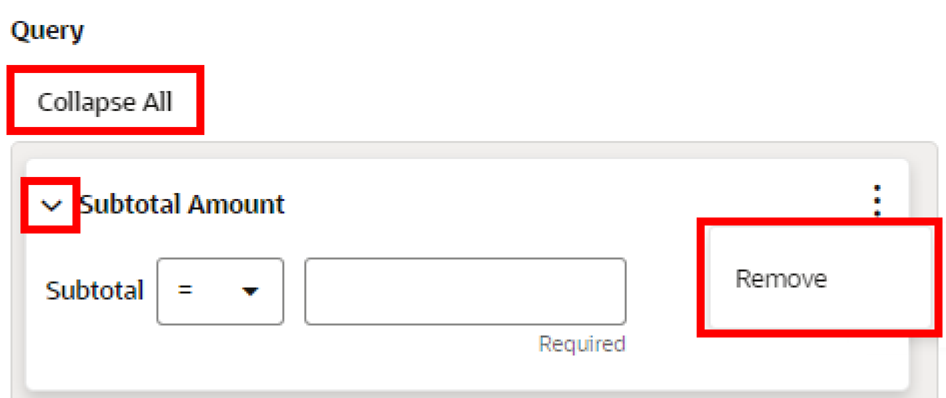
> **Note:**
>
> If you use **And**, a record is only included in the node if it matches all of the criteria in the subnodes. If you use **Or**, a record is included in the node if it matches any of the criteria in the subnodes.

Figure 8-36 Segment



d. Enter the **Search Criteria** into the appropriate fields. See Segment Queries for more information about criteria fields.

Figure 8-37 Query Options



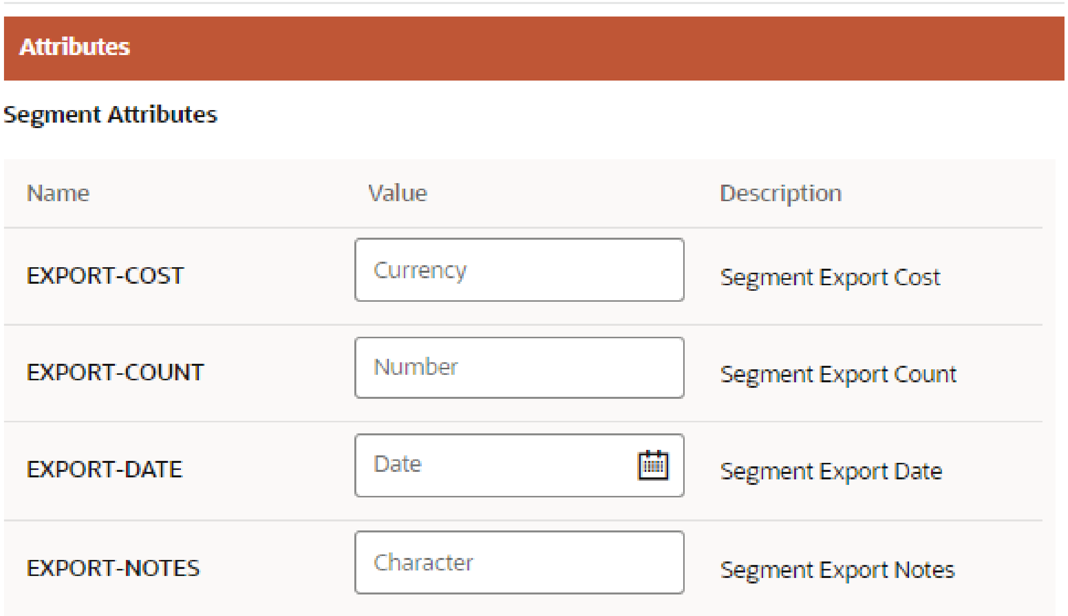
e. After entering the search criteria you can collapse or expand criteria at any time. To Collapse a criteria click the arrow next to each criteria. To change all criteria at once, click **Collapse All/Expand All** to **Collapse/Expand**.

f. When you need to clear criteria from the query, click the **Action Menu** and then click **Remove**.

17. When finished building the strata query, click **Next** to select or enter Attributes to the segment.

18. Attributes can be added to the Segment to further distinguish qualifications for the Segment.

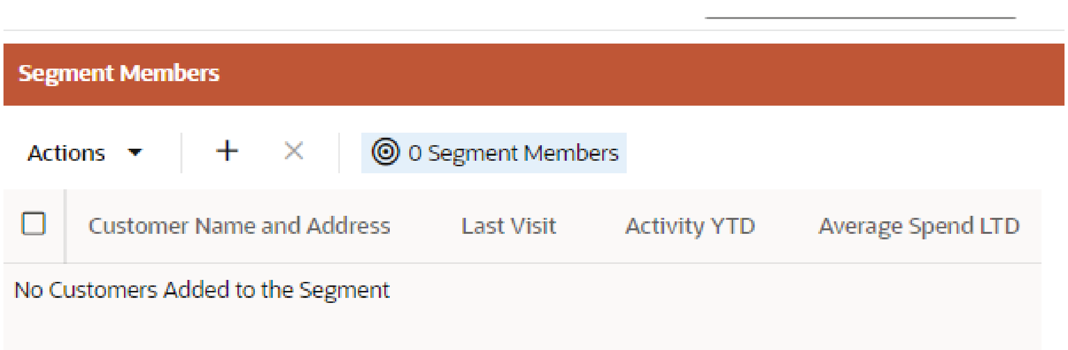
Figure 8-38 Segment Attributes Tab



- Select or enter the **configuration values** for each of the required Segment Attributes (shown with an asterisk*).
- Add **values** for any Optional Segment Attributes.
- Select or enter the **configuration value** for the Segment Attribute.
- Repeat **Step 18** for all optional Attributes you wish added to the Segment.

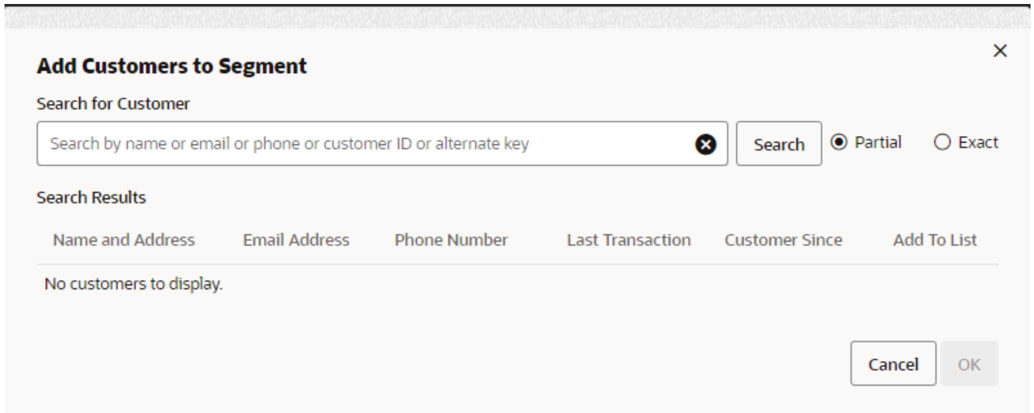
19. When finished defining any attributes for the Segment, click **Next**.
    - If the Segment Type is **Stratified** or **Unstratified** proceed to **Step 22**.
    - If the Segment Type is Personal List proceed to **Step 20**, Segment Members.

Figure 8-39 Segment Members Tab



20. To Assign Segment Members do the following:
    - Click the **Actions Menu**, and click **Add**, or click the **Add (+)** icon. This opens the Add Customers to Segment window.

Figure 8-40 Add Customers To Segment

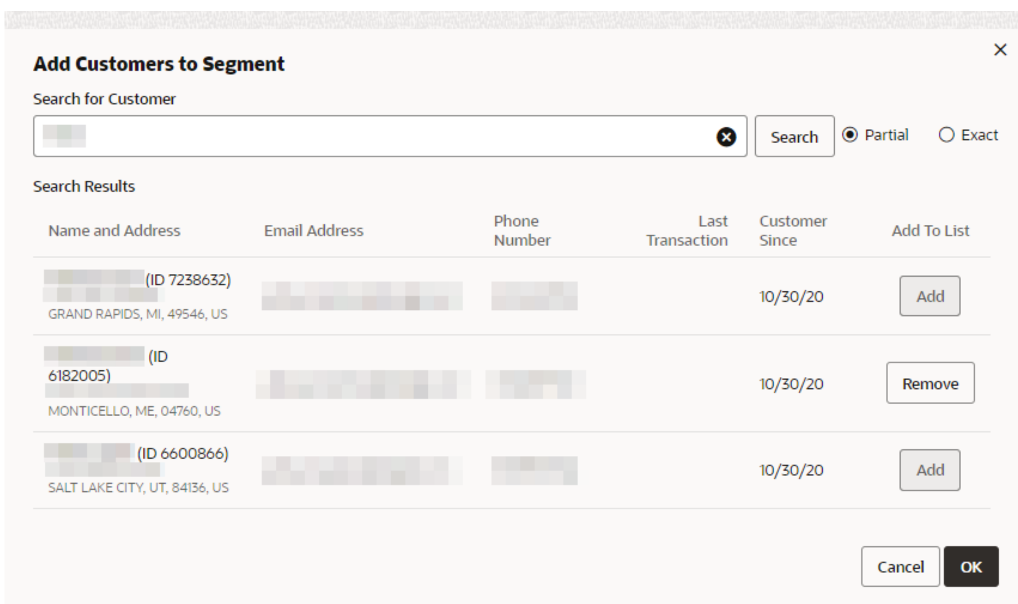


- In the Search for Customers field, enter the **Name**, **ID**, **Email Address**, or **Phone Number** of the customer you want to search for. Click **Partial** to search for Customers that partially match the search text, or click **Exact**, to search for an exact match.

> **Note:**
>
> You also have the option to enter no search criteria and click **Search** to retrieve all available Customers from which to select for membership.

- Add Customer to Segment

Figure 8-41 Add Customers to Segment

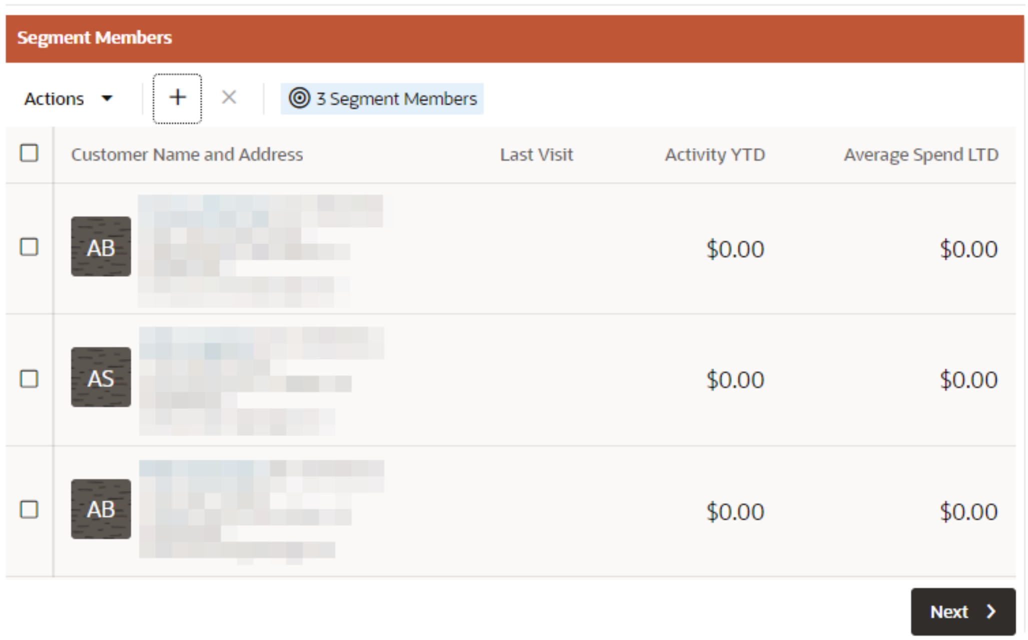


- Click **Add** for every customer you wish to add to the Personal List.
- Click **Remove** for every customer you wish to remove from the Personal List.

  – When you are finished adding customers from each search, you can either click **OK** to close the window and save the changes or click **Cancel** to close the window without saving the changes.

- Editing Segment Members

Figure 8-42 Segment Members List



Segment Member lists can be edited. Do the following to edit a Segment Members list.

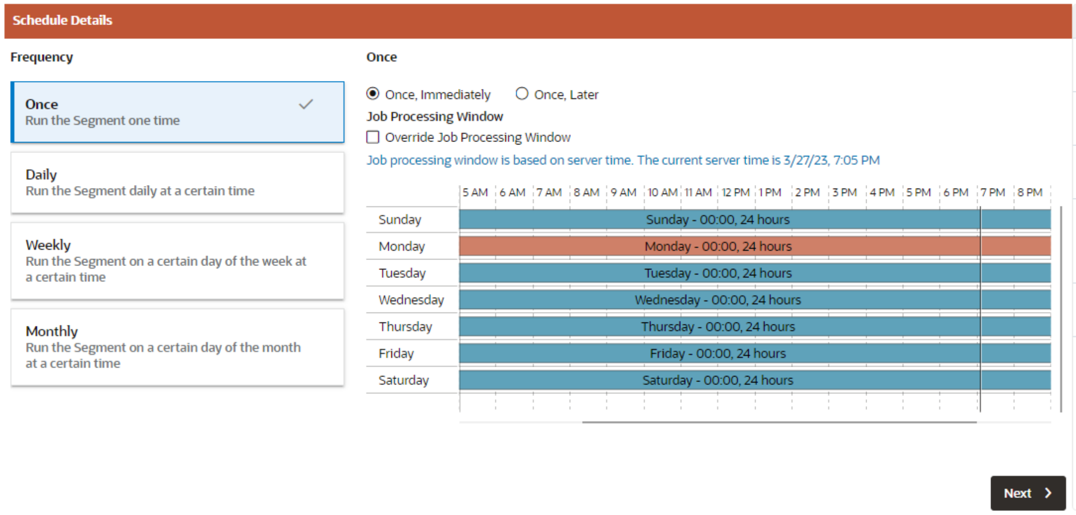
  – Select the **Customer** check box located next to each customer you wish to remove. To select all customers in the list, select the **Customer** check box at the top of the list.

  – To remove any selected names immediately, click the **Actions Menu**, and then either click **Remove** or the Remove (x) icon.

21. When finished editing the customers to the segment, click **Next**. Continue to **Step 28**, the Personal List: Review tab.

22. Define the Schedule on which the Segment Query is run. Select one of the following Job Execution Frequencies:

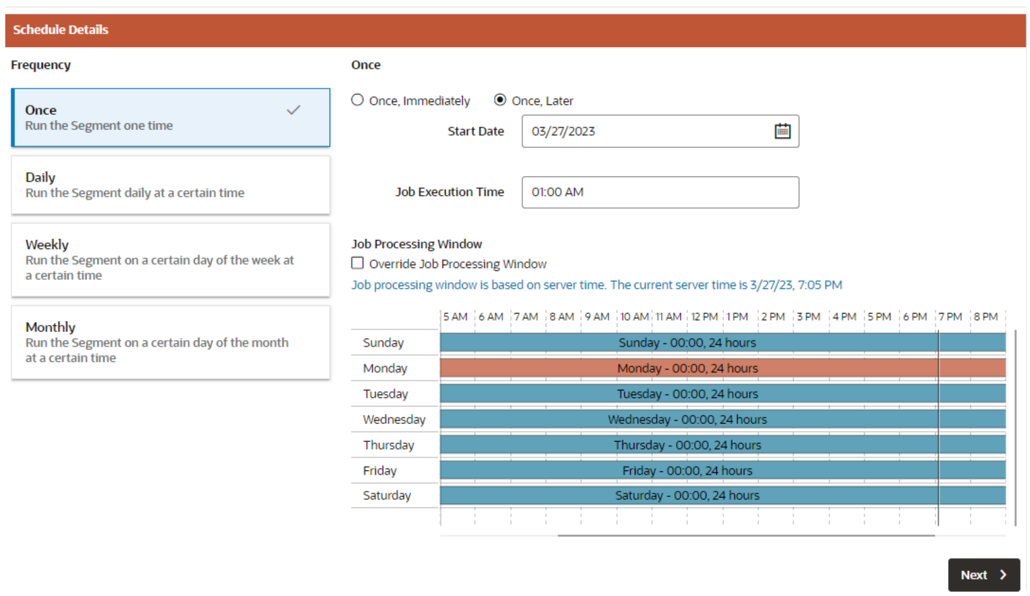
Figure 8-43 Frequency: Once, Immediately



- **Once, Immediately** - Run the Segment Query as soon as the Segment has been completed. If you select this option, proceed to **Step 24** for **Stratified** or **Step 26** for **Unstratified**.

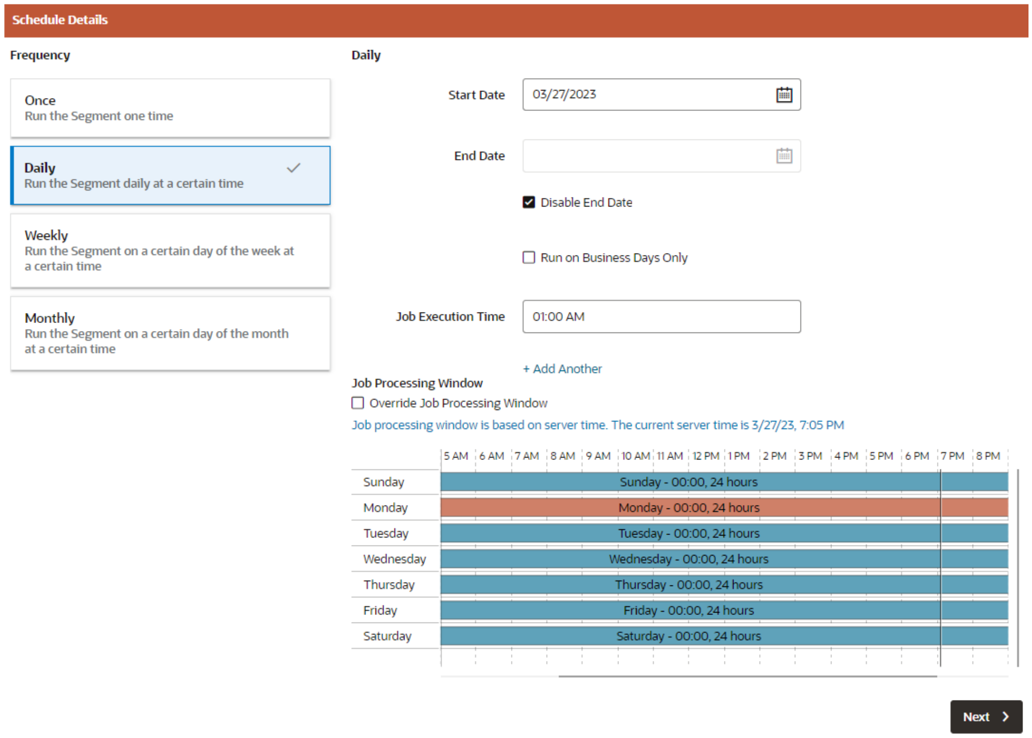
> **Note:**
>
> This option is not available if Publish to Clienteling is selected in the Segment Name step (see **Step 6**).

Figure 8-44 Frequency: Once, Later



- **Once, Later** - Run the Segment Query at a later date or time. Proceed to **Step 22.a**.

Figure 8-45 Frequency: Daily

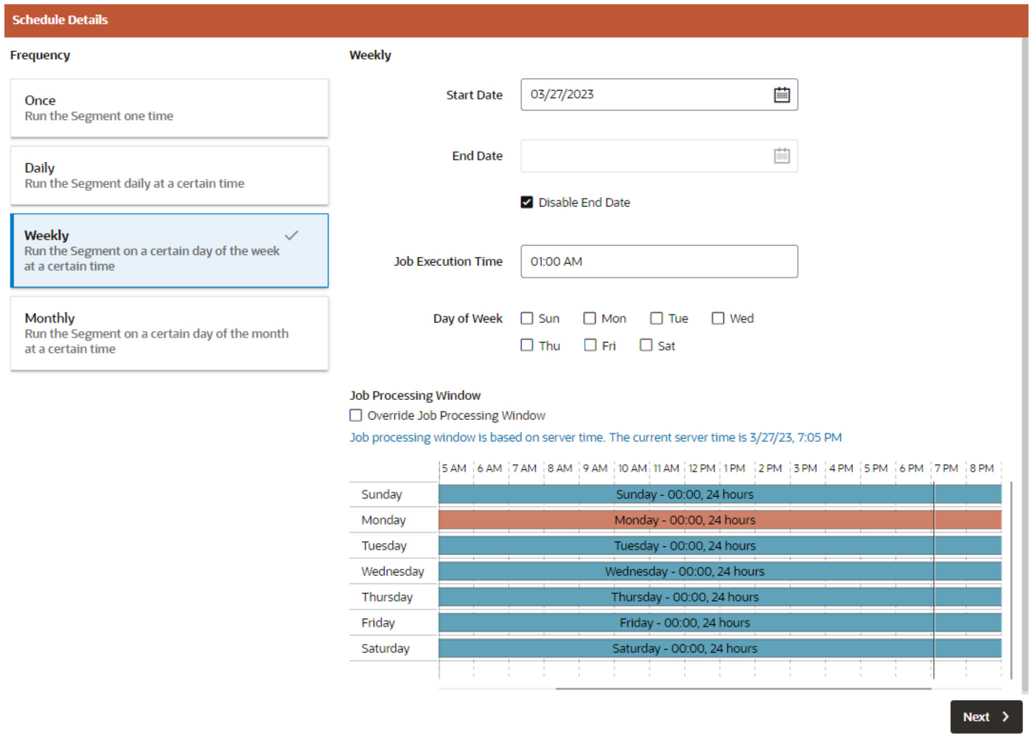


- **Daily** - Run the Segment Query every day. Proceed to **Step** 22.a.

  Either:

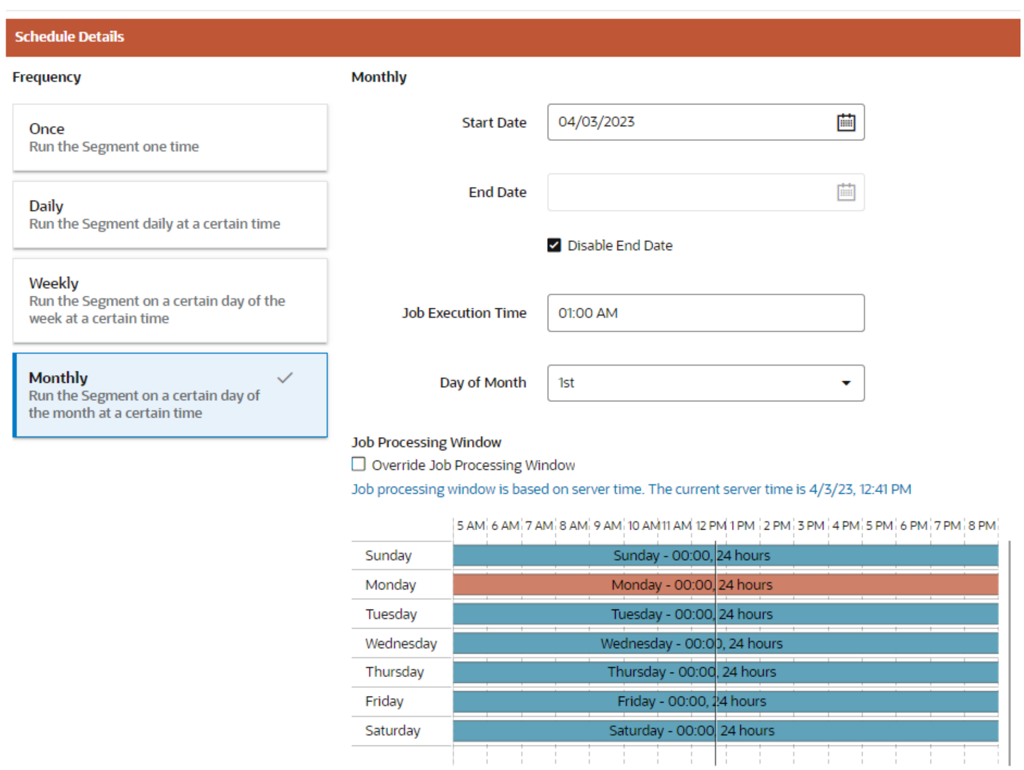
- **Daily, Business Days Only -** To run the Segment Query only on business days (For example: Monday through Friday), select the Run on Business Days Only check box. Proceed to **Step** 22.a.

Figure 8-46 Frequency: Weekly



- **Weekly** - Run the Segment Query once each week. Proceed to **Step 22.a**.

Figure 8-47 Frequency: Monthly



- **Monthly** - Run the Segment Query once each month. Proceed to **Step 22.a**.

a. Use the **Start Date Calendar Menu** to select the start of the time range in which the job will run.

   If you selected a Job Execution Frequency of **Once, Later**, proceed to **Step 22.f**.

b. Use the End Date Calendar Menu to select the end of the time range in which the job will run.

   - If you selected a Job Execution Frequency of Daily, or Daily, Business Days Only, proceed to **Step 22.e**.

   - If you selected a Job Execution Frequency of Weekly, proceed to **Step 22.c**.

   - If you selected a Job Execution Frequency of Monthly, proceed to **Step 22.d**.

c. Use the Day of Week Selection Menu to select the day of the week on which the job will run. Proceed to **Step 22.e**.

d. Use the Day of Month Selection Menu to select the day of the month on which the job will run. Proceed to **Step 22.e**.

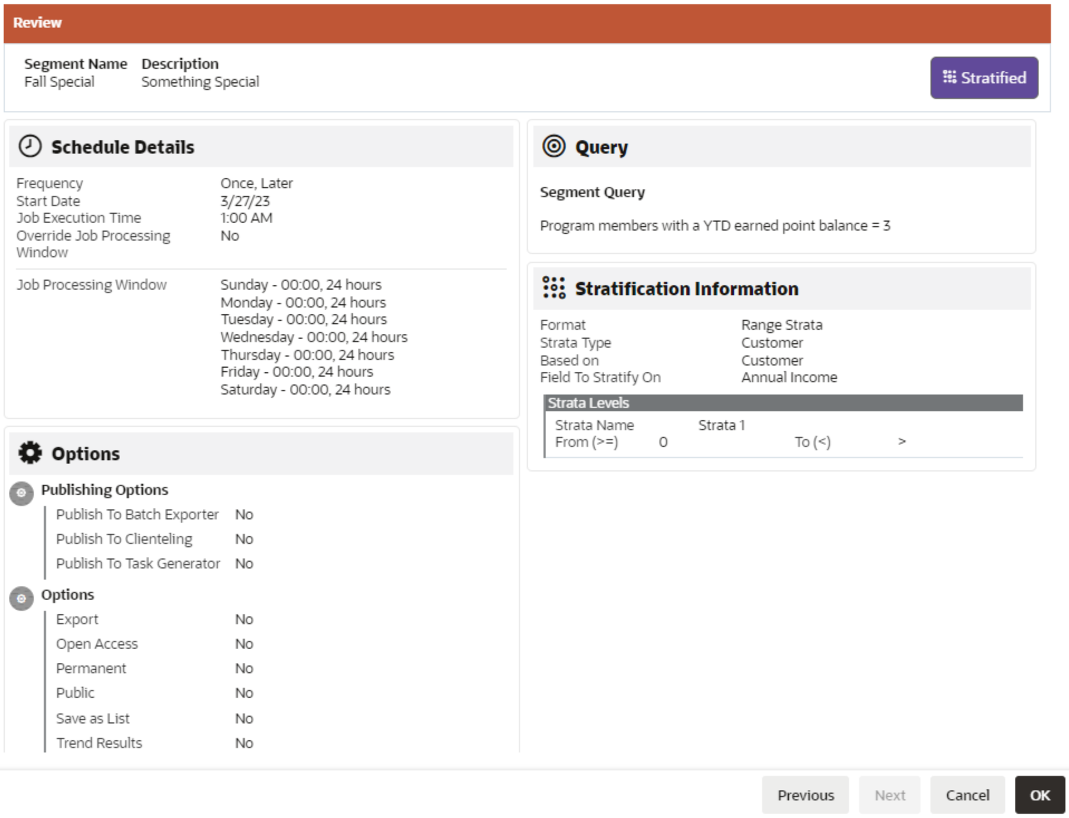
e. Use the **Job Execution Time Time Menus** to determine the time at which the job will run.

> **Note:**
>
> It is recommended that you select a time that is within the Job Processing Window. If you select a time outside the Job Processing Window, the Override Job Processing Window setting (see **Step 22.f**) must be checked for the job to run.

f. Use the **Override Job Processing Window** Check Box to indicate whether the job should run, even if it is scheduled outside the Job Processing Window.

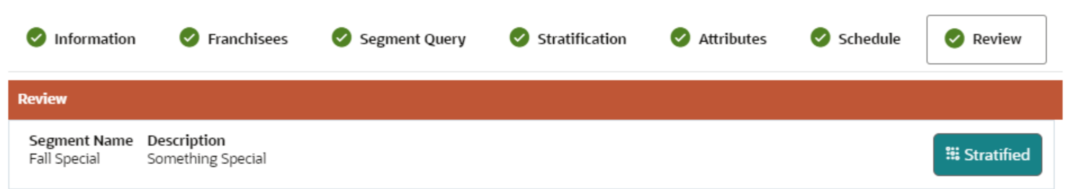
23. When finished defining Schedule Details for the Segment, click **Next** and advance to the Review Tab.
    - If the Segment Type is **Stratified** proceed to **Step 24**, the Stratified: Review tab.
    - If the Segment Type is **Unstratified** proceed to **Step 26**, the Unstratified: Review tab.
24. The **Review** tab displays key elements in the Create Segment Setup. Review the following for the **Stratified** Type.

Figure 8-48 Stratified Review Tab



25. Click **OK** to create the segment, or click **Cancel** to close without saving.

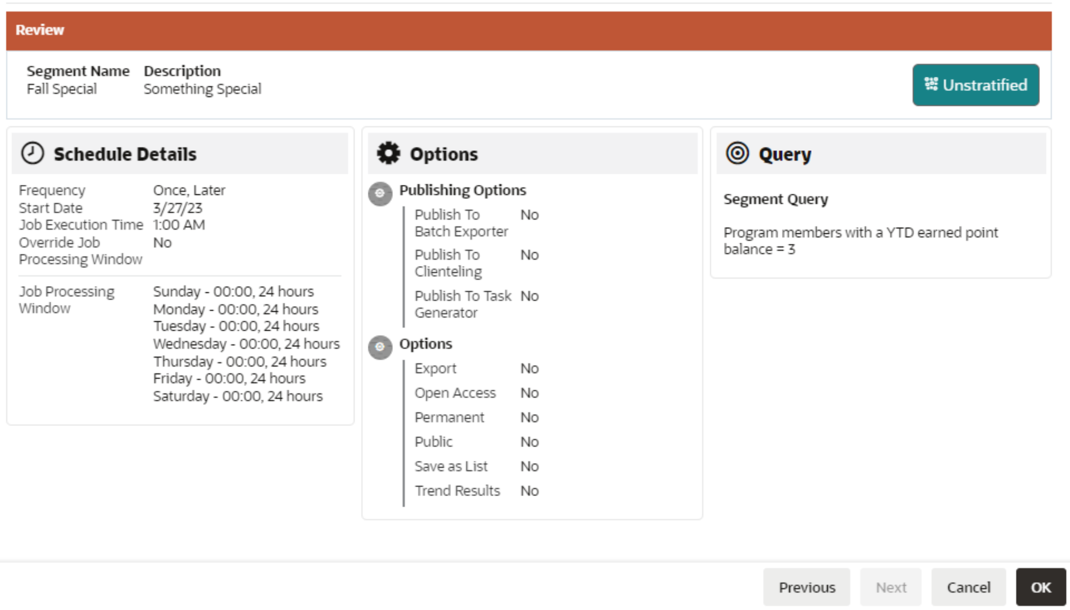
Figure 8-49 Segment Tabs Links - Stratified



> **Note:**
>
> Before you save the Segment, you can use the **tab links** along with **Previous** and **Next** to go back to any point in the create segment process and make changes.

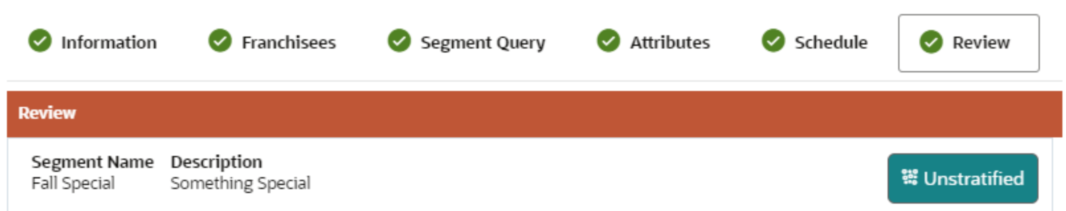
26. The **Review** tab displays key elements in the Segment Setup. Review the following for the **Unstratified** Type.

Figure 8-50 Unstratified Review Tab



27. Click **OK** to create the segment, or click **Cancel** to close without saving.

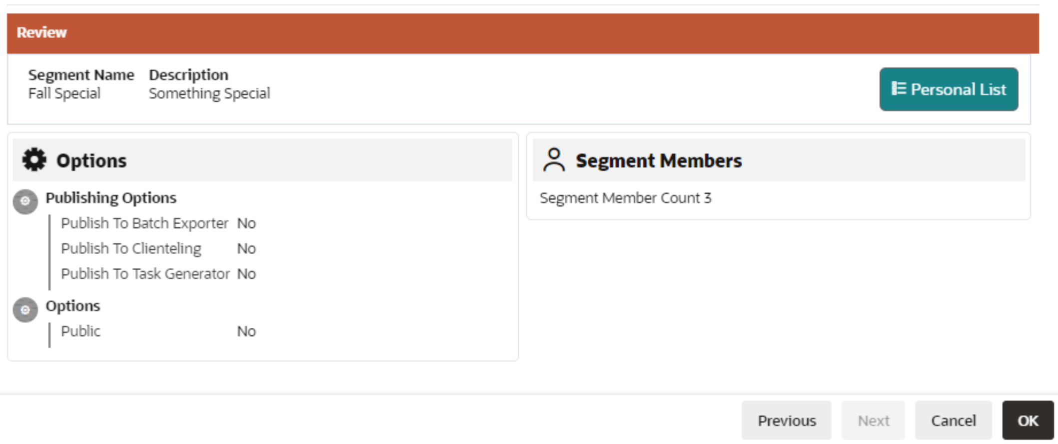
Figure 8-51 Segment Tabs Links - Unstratified



> **Note:**
>
> Before you save the Segment, you can use the **tab links** along with **Previous** and **Next** to go back to any point in the create segment process and make changes.

28. The **Review** tab displays key elements in the Create Segment Setup. Review the following for the **Personal List** Type.

Figure 8-52 Personal List Review Tab



29. Click **OK** to create the segment, or click **Cancel** to close without saving.

Figure 8-53 Segment Tab Links - Personal List

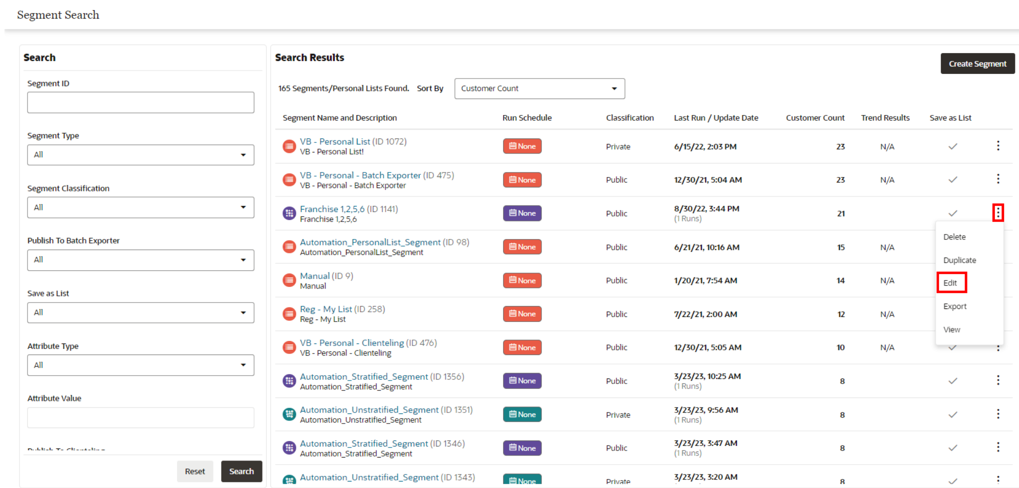
> **Note:**
>
> Before you save the Segment, you can use the **tab links** along with **Previous** and **Next** to go back to any point in the create segment process and make changes.

Editing Segments/Personal Lists

You can access a Segment/Personal List for editing using the following methods to display the Edit option:

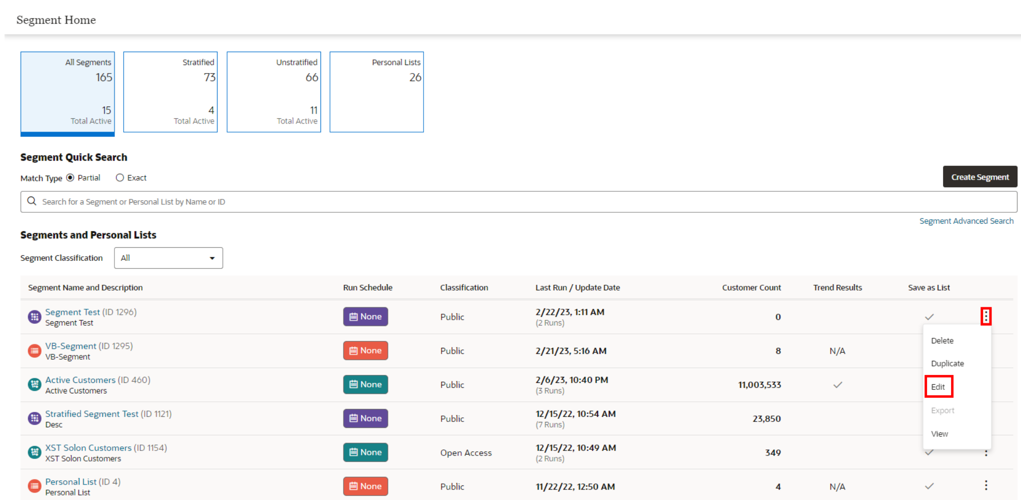
- Segment Search Results
  - Click the **Overflow Menu** icon on the far right in the data display section for an individual **Segment/Personal List** in the Segment Advanced Search window (**Segment/Personal List Record Result Section**).
  - Click **Edit**.

Figure 8-54 Overflow Menu Options (Segment Advanced Search)



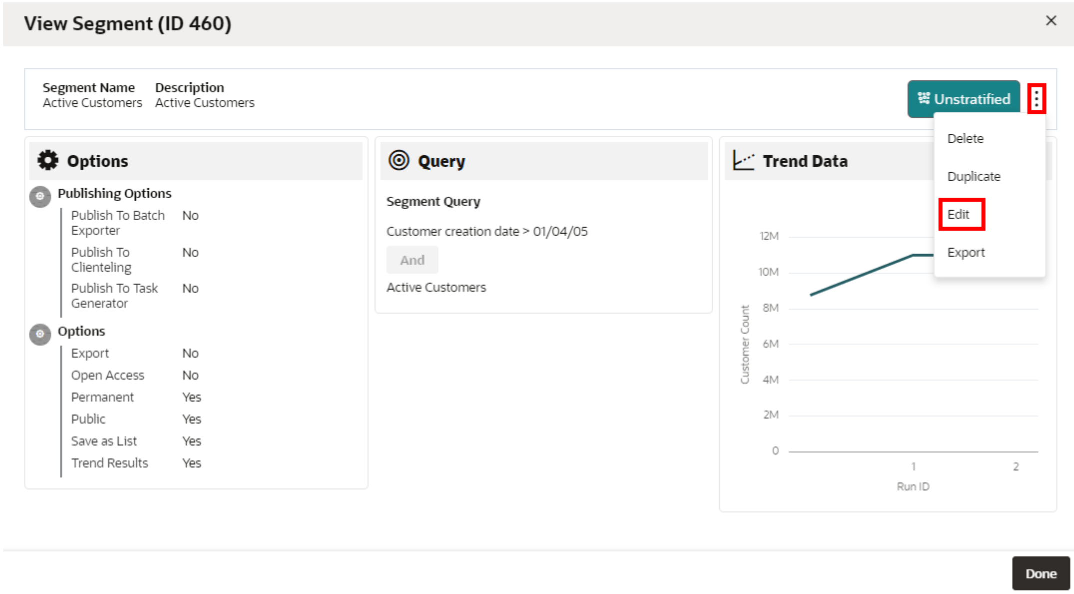
- Segment Quick Search
  - Click the **Overflow Menu icon** on the far right in the data display section for each individual **Segment/Personal List** in the **Segment Quick Search** window.
  - Click **Edit**.

Figure 8-55 Overflow Menu Options (Segment Quick Search)



- View Segment View
  - Click the **Overflow Menu** icon on the far right in the data display section for an individual Segment/Personal List.
  - Click **Edit**.

Figure 8-56   View Segment/Personal List (Edit)



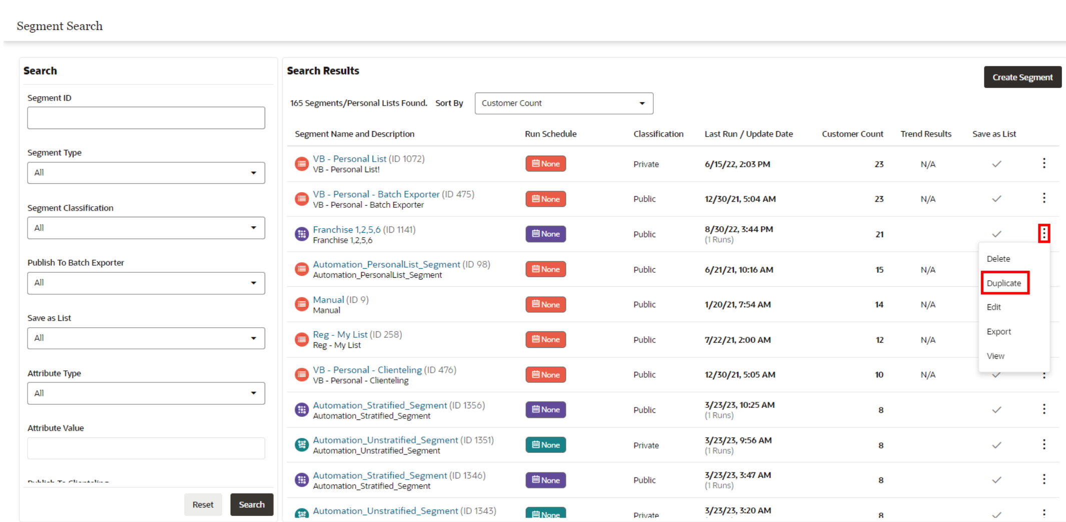
For detailed information on each section while editing a Segment or Personal List see Creating a Segment or Personal List.

Duplicating Segments/Personal Lists

You can duplicate a Segment/Personal List using the following methods to display the Duplicate option:

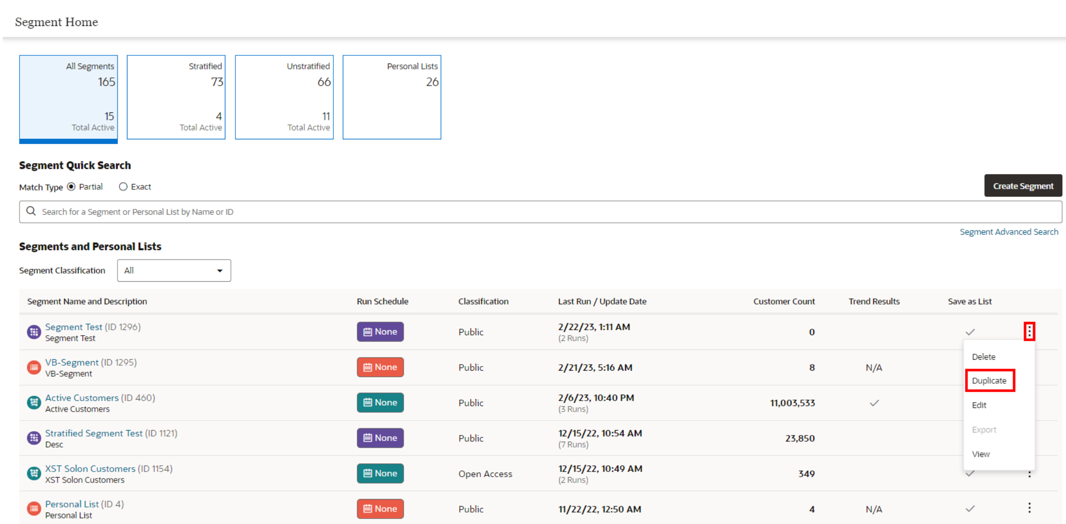
- Segment Search Results
  - Click the **Overflow Menu** icon on the far right in the data display section for each individual **Segment/Personal List** in the **Segments Advanced Search** window.
  - Click **Duplicate**.

Figure 8-57   Overflow Menu Options (Segments Advanced Search)



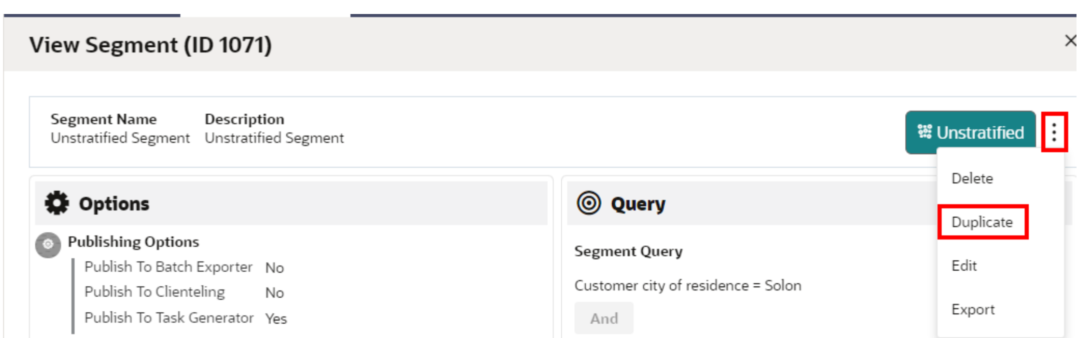
- Segment Quick Search
  - Click the **Overflow Menu** icon on the far right in the data display section for an individual Segment/Personal List.
  - Click **Duplicate**.

Figure 8-58 Overflow Menu Options (Segment Quick Search)



- View Segment View
  - Click the **Overflow Menu** icon on the far right in the data display section for an individual Segment/Personal List.
  - Click **Duplicate**.

Figure 8-59 View Segment List (Duplicate)



For detailed information on each section after duplicating an offer see Creating a Segment or Personal List.

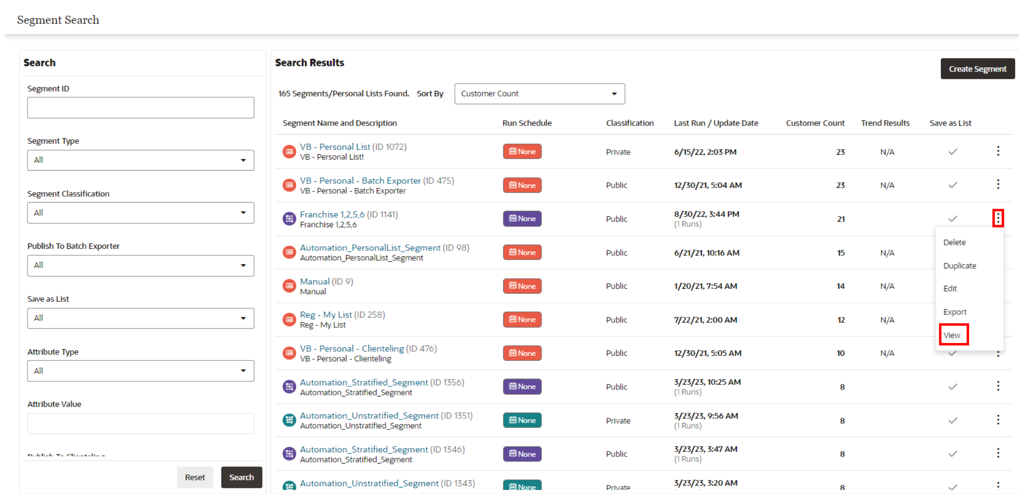
Viewing Segments/Personal Lists

You can access a Segment/Personal List for viewing using the following methods to display the View option:

- Segment/Personal List Search Results

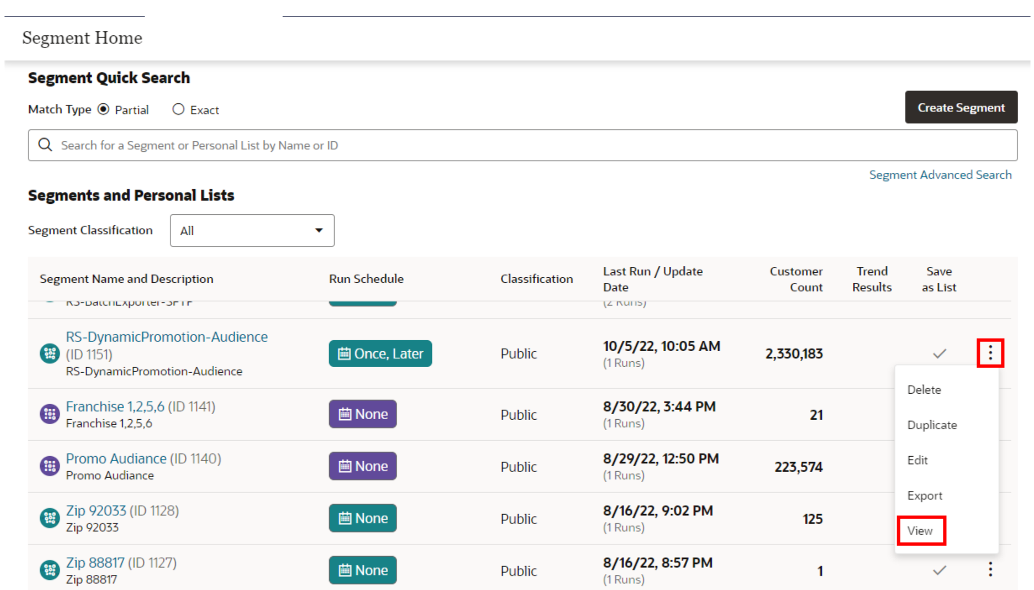
- Click the **Overflow Menu** icon on the far right in the data display section for each individual **Segment/Personal List** in the Segment/Personal List Advanced Search window (**Segment/Personal List Record Result Section**).
- Click **View**.

Figure 8-60 Overflow Menu Options (Segments Advanced Search)



- Segment/Personal List Quick Search
  - Click the **Overflow Menu icon** on the far right in the data display section for each individual **Segment/Personal List** in the **Segment/Personal List Quick Search** window.
  - Click **View**.

Figure 8-61 Overflow Menu Options (Segments Quick Search)



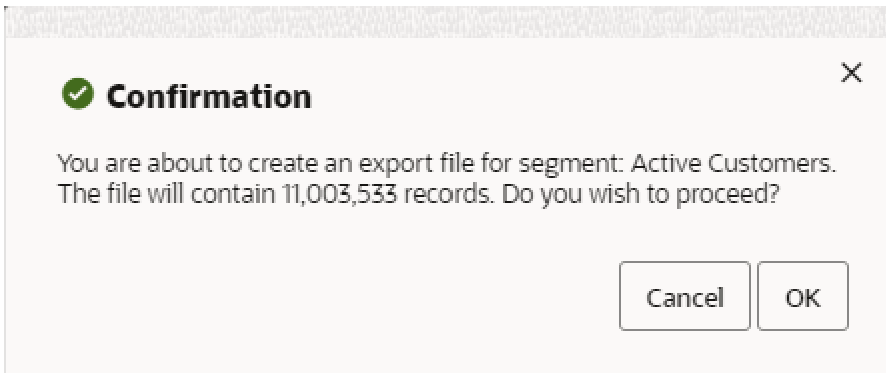
For detailed information on each section while Viewing an offer see Creating a Segment or Personal List.

Exporting Segments

You can export a Segment using the following methods to display the Export option:

- Segment Search Results
  - Click the **Overflow Menu** icon on the far right in the data display section for each individual **Segment** in the **Segments Advanced Search** window.
  - Click **Export**. A confirmation appears.

Figure 8-62 Export Confirmation



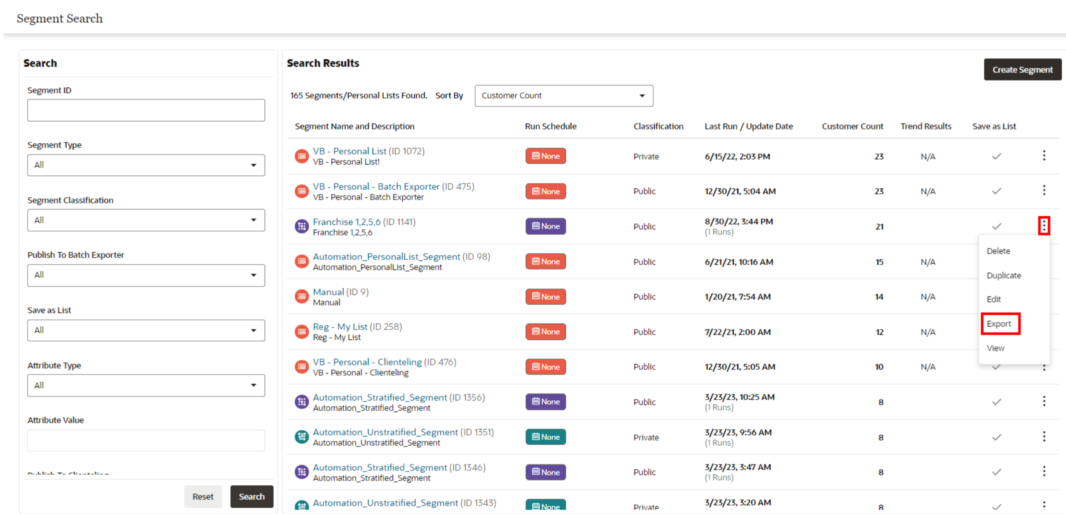
  - Click **OK** to export the Segment or **Cancel** to close the confirmation without saving.

Note:

A confirmation appears in the window.

Figure 8-63 Export Job Notification

Figure 8-64 Overflow Menu Options (Segments Advanced Search)

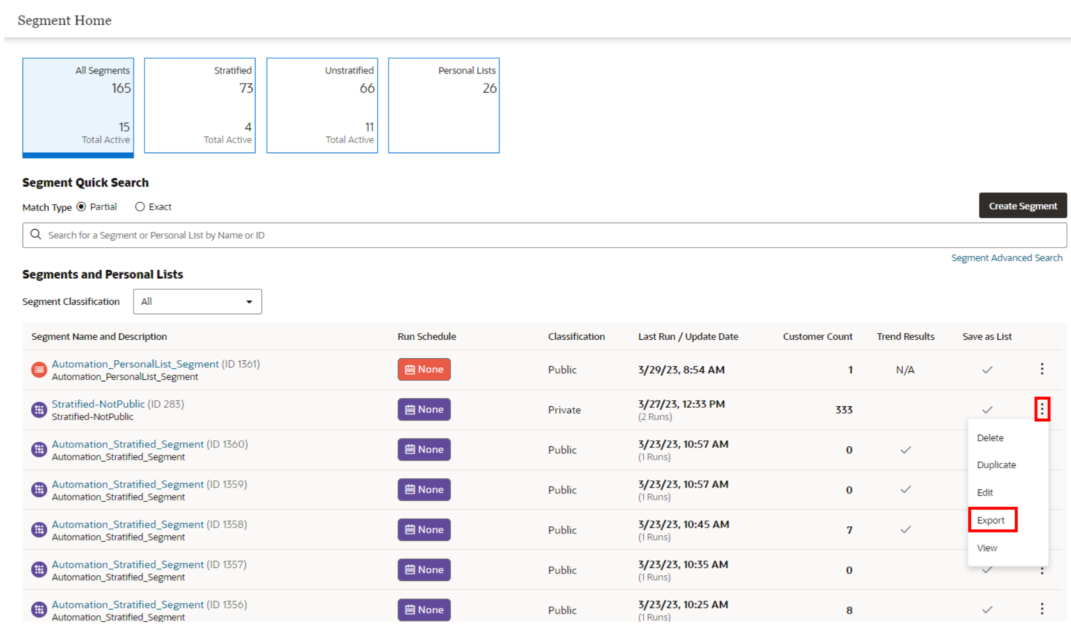


- Segment Quick Search
  - Click the **Overflow Menu** icon on the far right in the data display section for an individual Segment.
  - Click **Export**.
  - Click **OK** to export the Segment or **Cancel** to close the confirmation without saving.

> **Note:**
>
> A confirmation appears in the window.

Figure 8-65 Export Job Notification

Figure 8-66 Overflow Menu Options (Segment Quick Search)

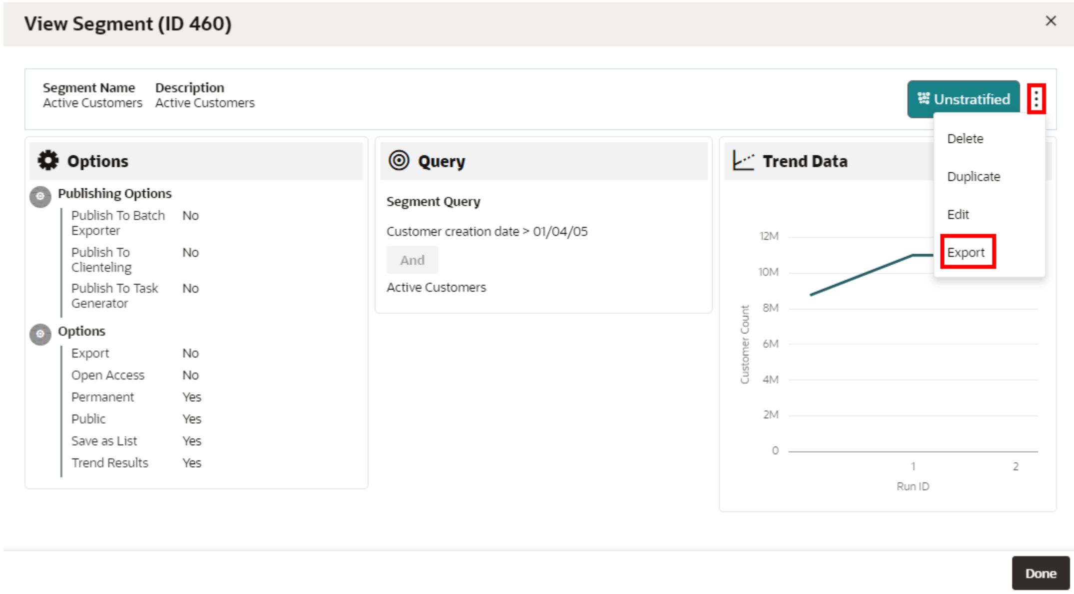


- View Segment View
  - Click the **Overflow Menu** icon on the far right in the data display section for an individual Segment.
  - Click **Export**.
  - Click **OK** to export the Segment or **Cancel** to close the confirmation without saving.

> **Note:**
>
> A confirmation appears in the window.

Figure 8-67 Export Job Notification

Figure 8-68 View Segment (Export)

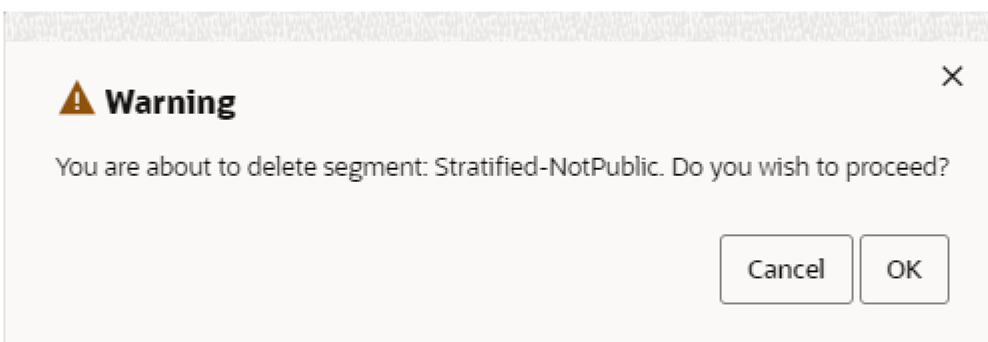


Deleting Segments/Personal Lists

You can delete a Segment/Personal List using the following methods to display the Delete option:

- Segment Search Results
  - Click the **Overflow Menu** icon on the far right in the data display section for each individual **Segment/Personal List** in the **Segments Advanced Search** window.
  - Click **Delete**. A warning message appears.

Figure 8-69 Delete Warning

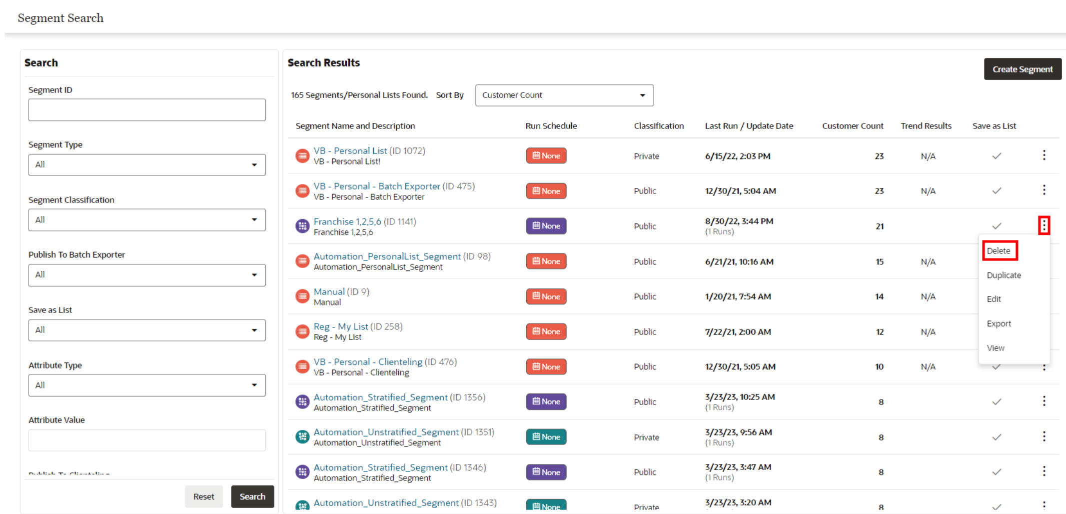


  - Click **OK** to delete the Segment/Personal List or **Cancel** to close the confirmation without saving.

> **Note:**
>
> A confirmation appears in the window.

Figure 8-70 Confirmation Message

Figure 8-71 Overflow Menu Options (Segments Advanced Search)

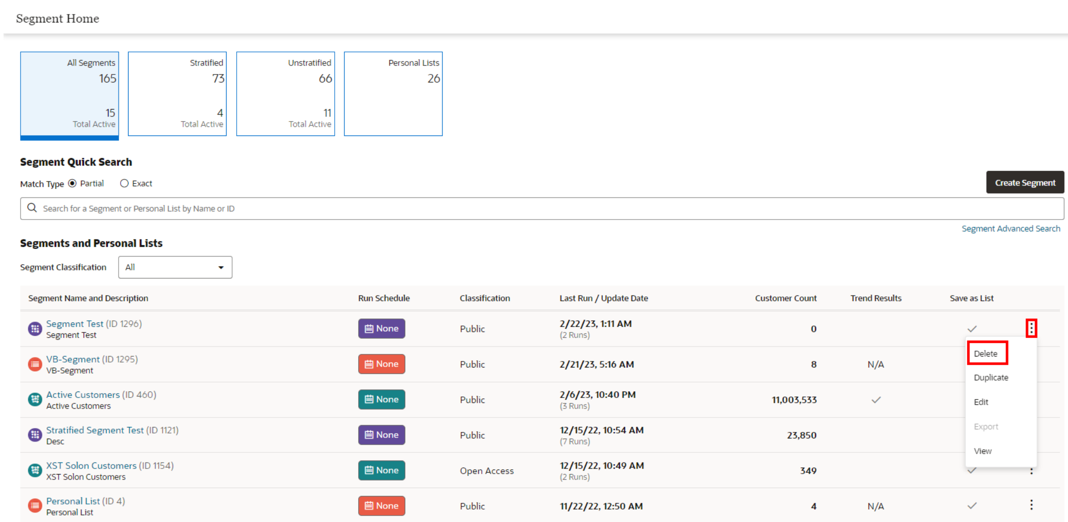


- Segment Quick Search
  - Click the **Overflow Menu** icon on the far right in the data display section for an individual Segment/Personal List.
  - Click **Delete**.
  - Click **OK** to delete the Segment/Personal List or **Cancel** to close the confirmation without saving.

> **Note:**
>
> A confirmation appears in the window.

Figure 8-72 Confirmation Message

Figure 8-73 Overflow Menu Options (Segment Quick Search)

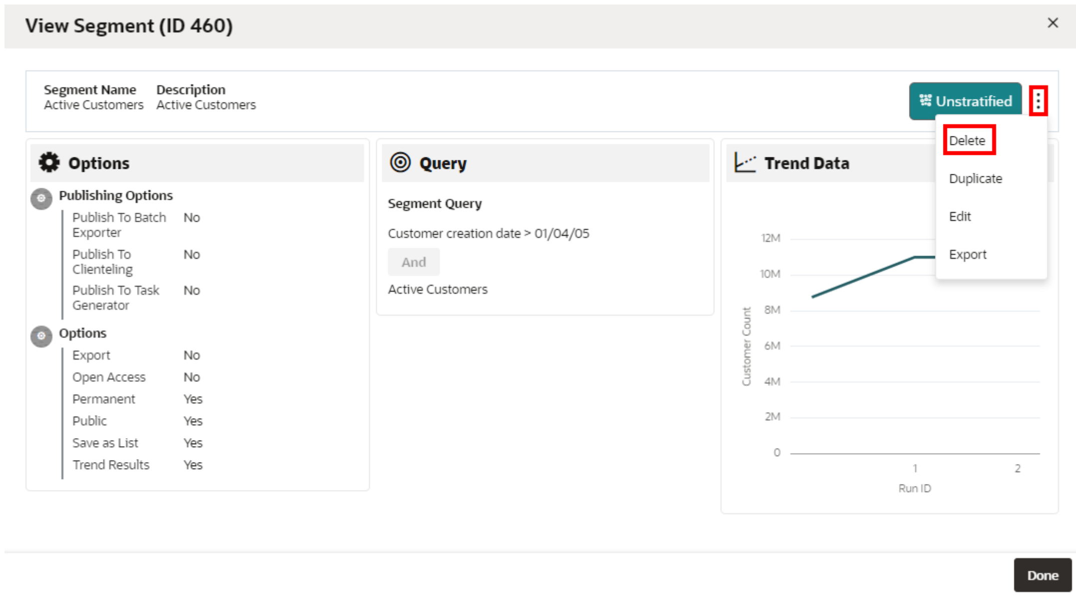


- View Segment View
  - Click the **Overflow Menu** icon on the far right in the data display section for an individual Segment/Personal List.
  - Click **Delete**.
  - Click **OK** to delete the Segment/Personal List or **Cancel** to close the confirmation without saving.

> **Note:**
>
> A confirmation appears in the window.

Figure 8-74 Confirmation Messages

Figure 8-75 View Segment/Personal List (Delete)

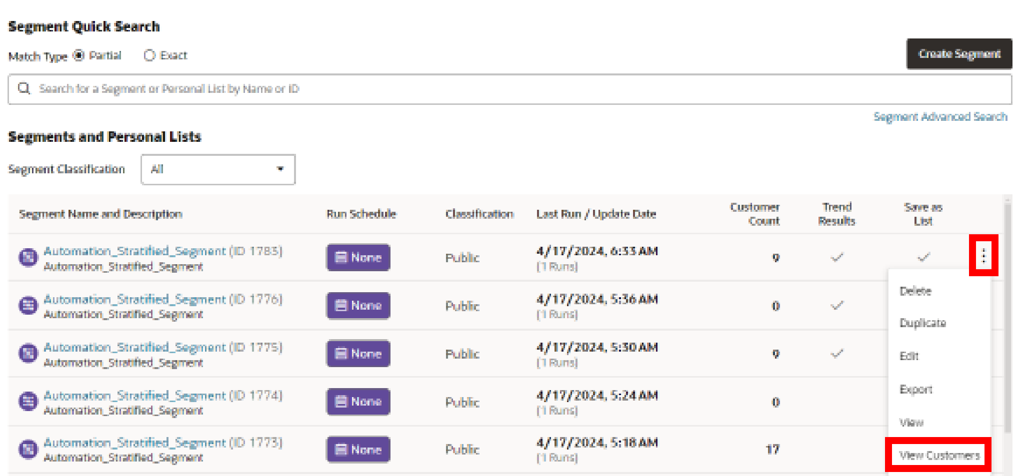


View Customers

View Customers enable the user the ability to view customers in a selected segment where the segment has been saved as a list, so that a user can browse the selected customers.

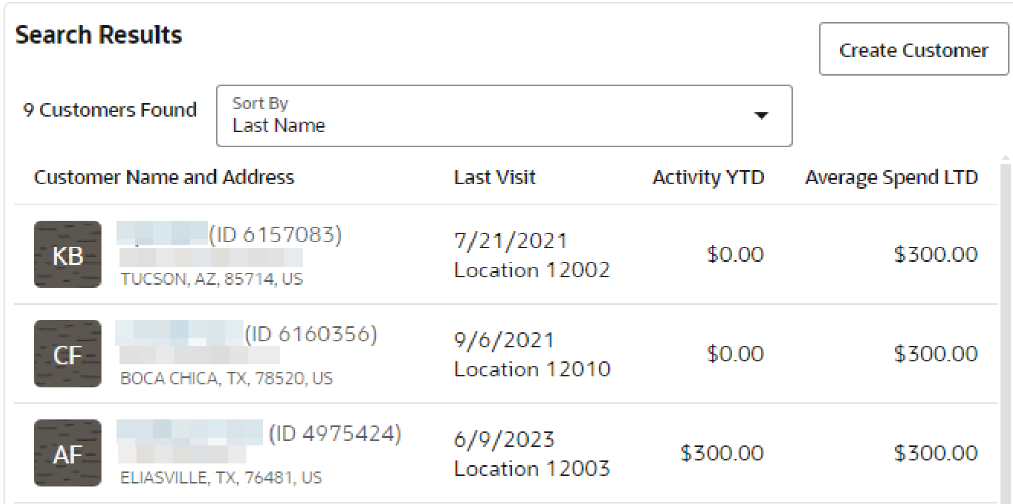
- **Segment Home (Segment Quick Search)**
  - Click the **Actions** menu on the far right in the data display section for each individual **Segment/Personal List** in the Segment/Personal List Quick Search window (**Segment/Personal List Record Result Section**).

Figure 8-76 Overflow Menu Options (Segments Quick Search)



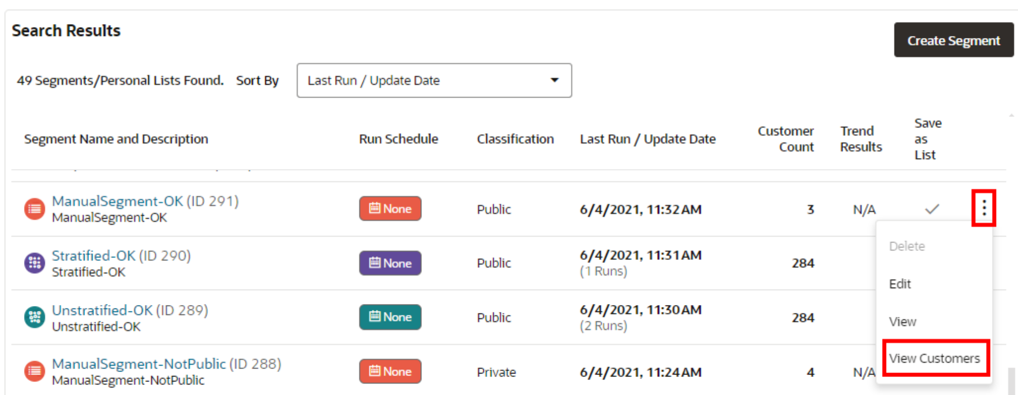
  - Click **View Customers**. **Result:** The user is able to view the list of customers for the selected stratified, unstratified or personal list segment from the Segment Home (Quick Search) screen.

Figure 8-77   View Customers Search Results



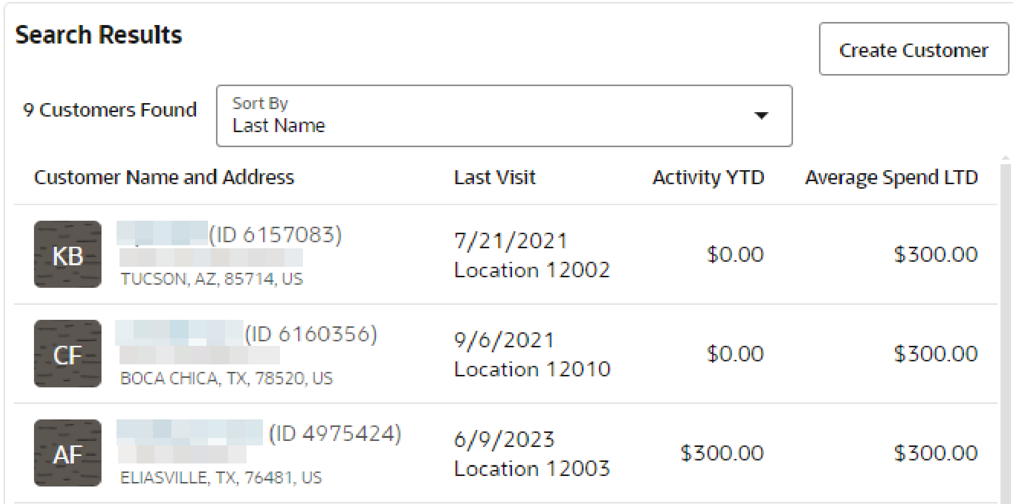
- **Segment/Personal List Advanced Search**
  - Click the **Actions** menu on the far right in the **Search Results** section for each individual **Segment/Personal List** in the **Segment/Personal List Advanced Search** window.

Figure 8-78   Actions Menu Options (Advanced Search)



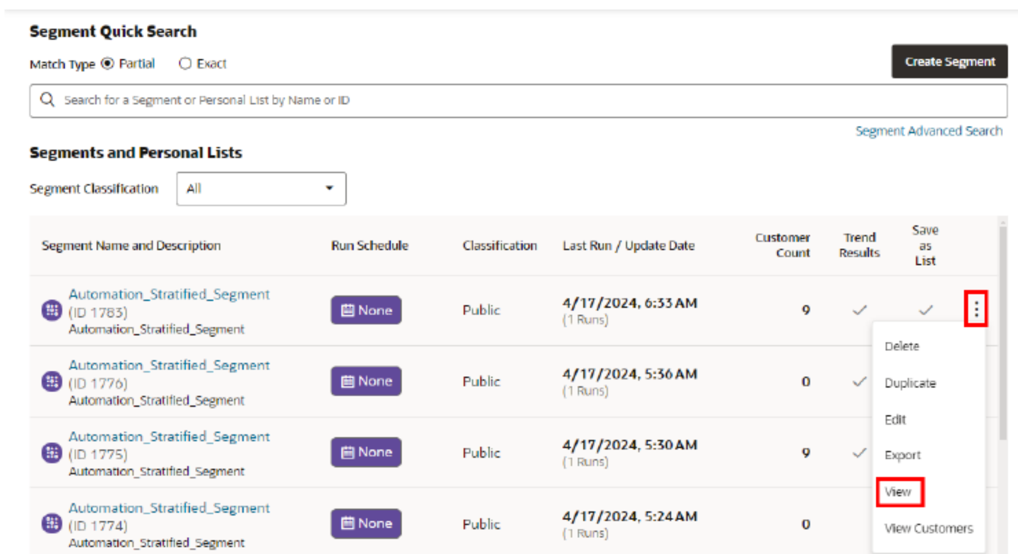
  - Click **View Customers**. **Result:** The user is able to view the list of customers for the selected stratified, unstratified or personal list segment from the Segment Home (Quick Search) screen.

Figure 8-79 View Customers Search Results



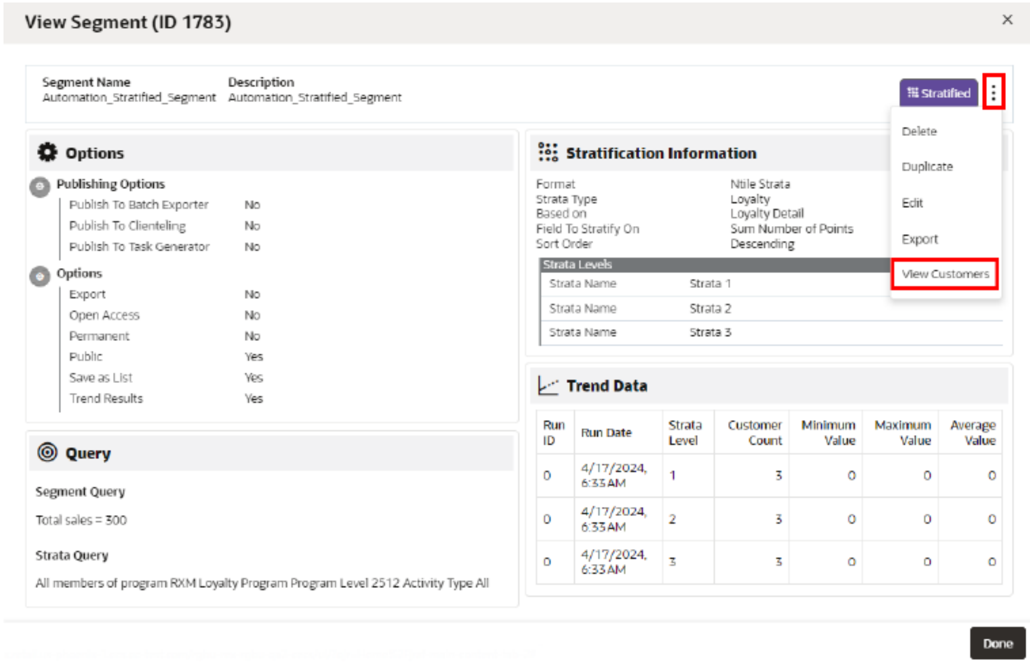
- **View Segment**
  - Click the **Actions** menu on the far right in the data display section for each individual **Segment/Personal List** in the Segment/Personal List Quick Search window (**Segment/Personal List Record Result Section**).

Figure 8-80 View Segment Actions Menu Options



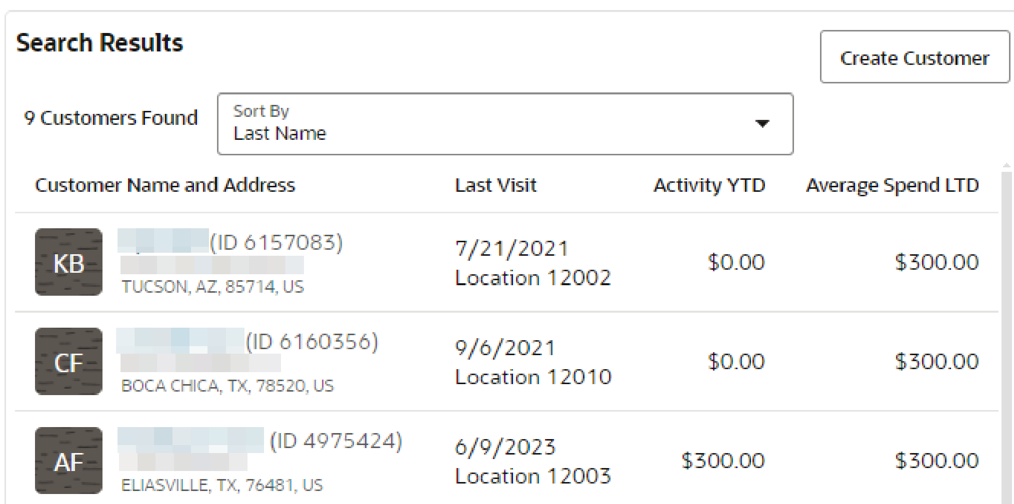
  - Click **View**. **Result:** The View Segment tab appears.

Figure 8-81 Action Menu Options (View Segment)



– Click the **Actions** menu.
– Click **View Customers**. **Result:** The user is able to view the list of customers for the selected stratified, unstratified or personal list segment from the Segment Home (Quick Search) screen.

Figure 8-82 View Customers Search Results



- **View Segment Scorecard**
  – Click the **Segment Name** displayed in the Segment/Personal List Quick Search window or from the Segment Advanced Search Results.

Figure 8-83 View Scorecard – Segment Quick Search

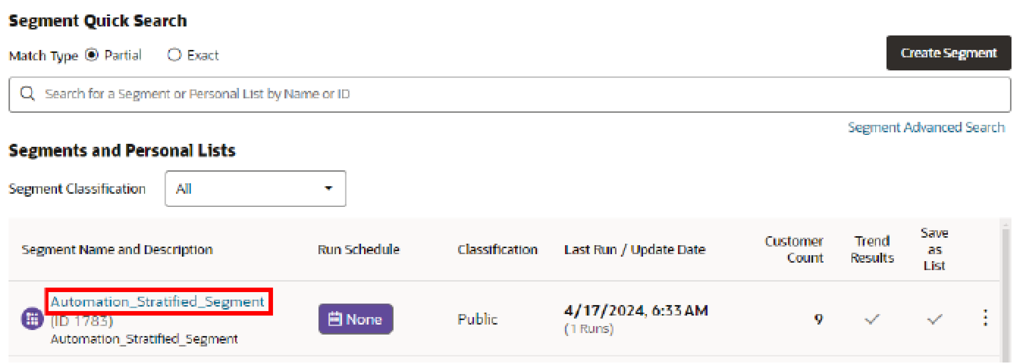
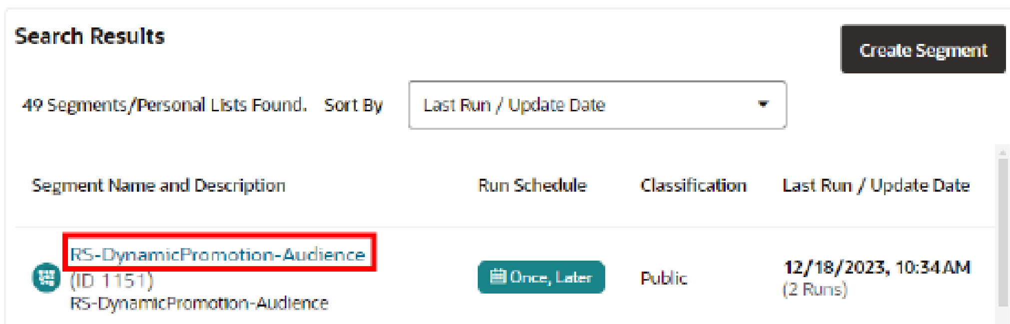
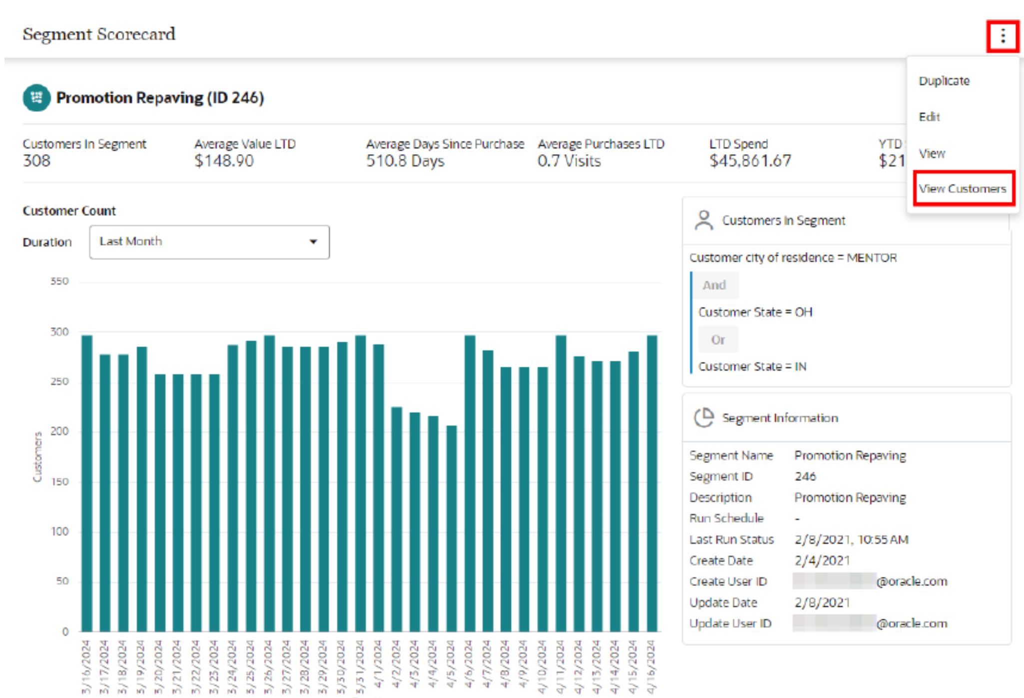


Figure 8-84 View Scorecard – Segment Advanced Search



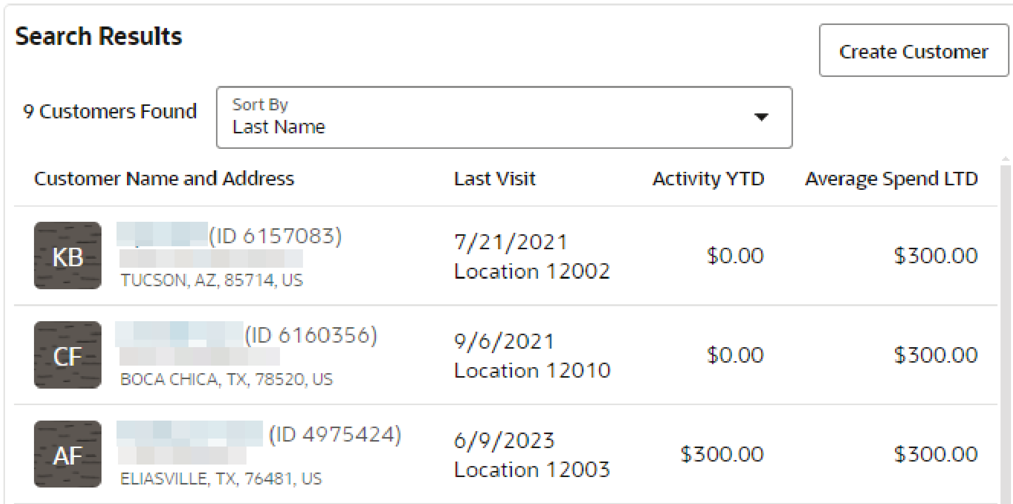
Result: The Segment Scorecard appears.

Figure 8-85 View Segment Actions Menu Options



- Click the **Actions** menu.
- Click **View Customers**. **Result:** The user is able to view the list of customers for the selected stratified or unstratified segment from the Segment Scorecard screen.

Figure 8-86 View Customers Search Results

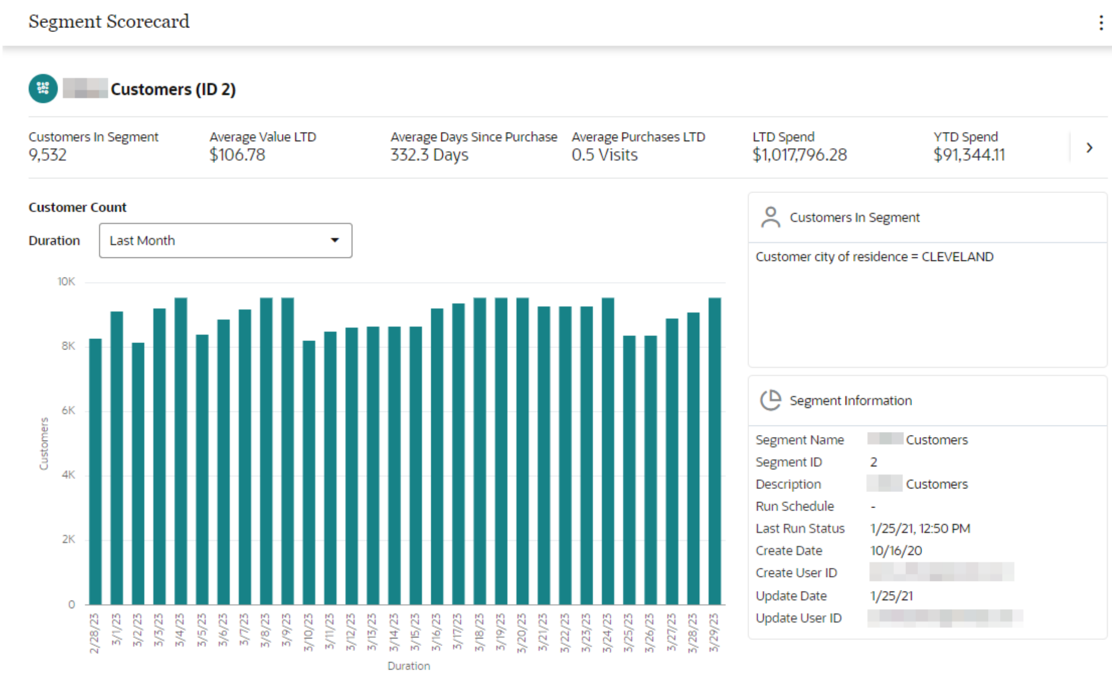


Segment Scorecards

The Segment Scorecard displays information about the Segment. You have the ability to periodically review the data on Segments. There are three types of Scorecards:

- Stratified Scorecard
- Unstratified Scorecard
- Personal List Scorecard

Figure 8-87   Stratified Segment Scorecard



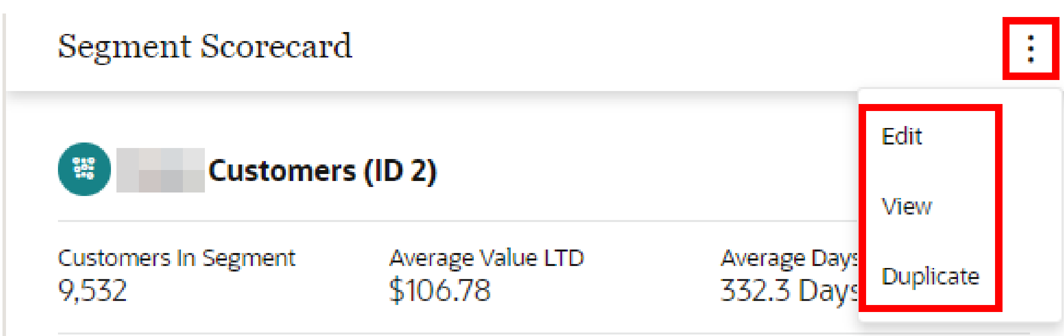
> **Note:**
>
> When no data is available a message appears informing you this Segment/Personal List does not contain any data.

Segment Scorecard Feature Bar

The Segment Scorecard Feature Bar contains the following information:

- Title of the window.
- Action Menu with the ability to **Edit**, **View**, or **Duplicate** the Segment/Personal List.

Figure 8-88   Action Menu Options



- The following information displays below the Feature Bar.
  - Segment Type Icon
  - Segment Name
  - Segment ID

Scorecard Analysis

Scorecards display high level metrics on customers within the segment, based on summary data.

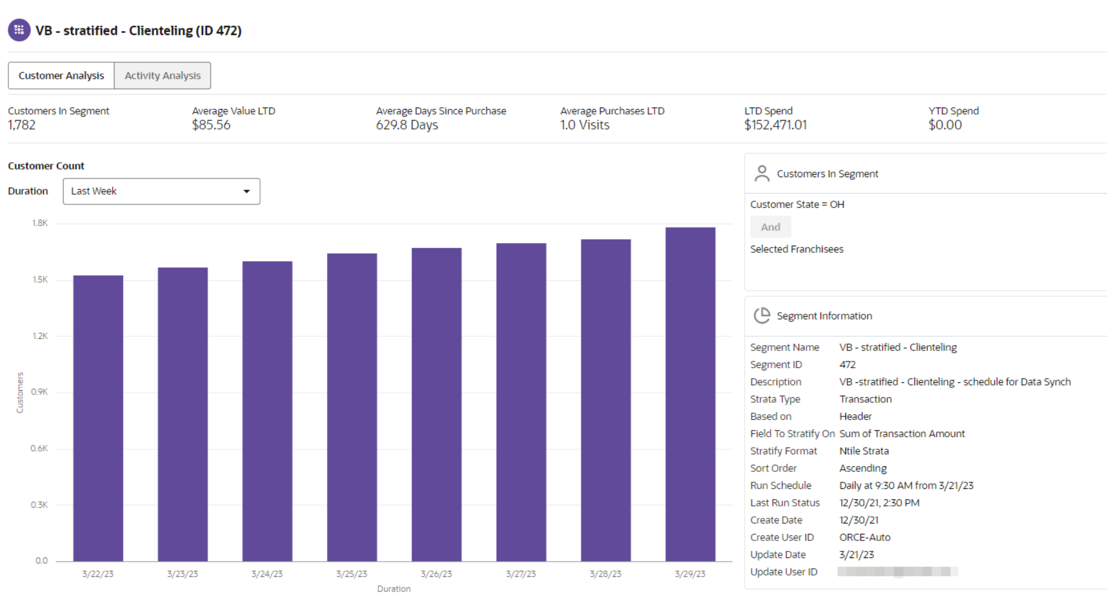
Stratified Segment Scorecard

The Stratified Segment Scorecard provides summary data metrics on customers within the each strata of the segment. Click one of the following choices:

- **Customer Analysis**- The analysis of each Customer within the Segment based on Recency, Frequency, and Monitory Value.
- **Activity Analysis** - The analysis of each Customer on the basis of strata level within the Segment using Recency, Frequency, and Monitory Value metric.

Customer Analysis Metrics

Figure 8-89 Segment Scorecard (Stratified) - Customer Analysis



- The following metrics and their values display above a graph.
  - Customers in Segment
  - Average Value LTD
  - Average Days Since Purchase
  - Average Purchases LTD

- LTD Spend
- YTD Spend

- Duration:
  - **Last Week** - Customer Trend for Last Week (7 days (Current date (-1)) is displayed.
  - **Last Month (Default)** - Customer Trend for Last Month (Current date (-1)) is displayed.
  - **Last 6 Months** - Customer Trend for Last 6 Months converted into weeks (Current date (-1)) is displayed.
  - **Last Year** - Customer Trend for Last 12 months (Current date (-1)) is displayed.
  - **Lifetime to Date** - Customer Trend for the last 5 years (Current date (-1)) is displayed.

Customer Count Graph

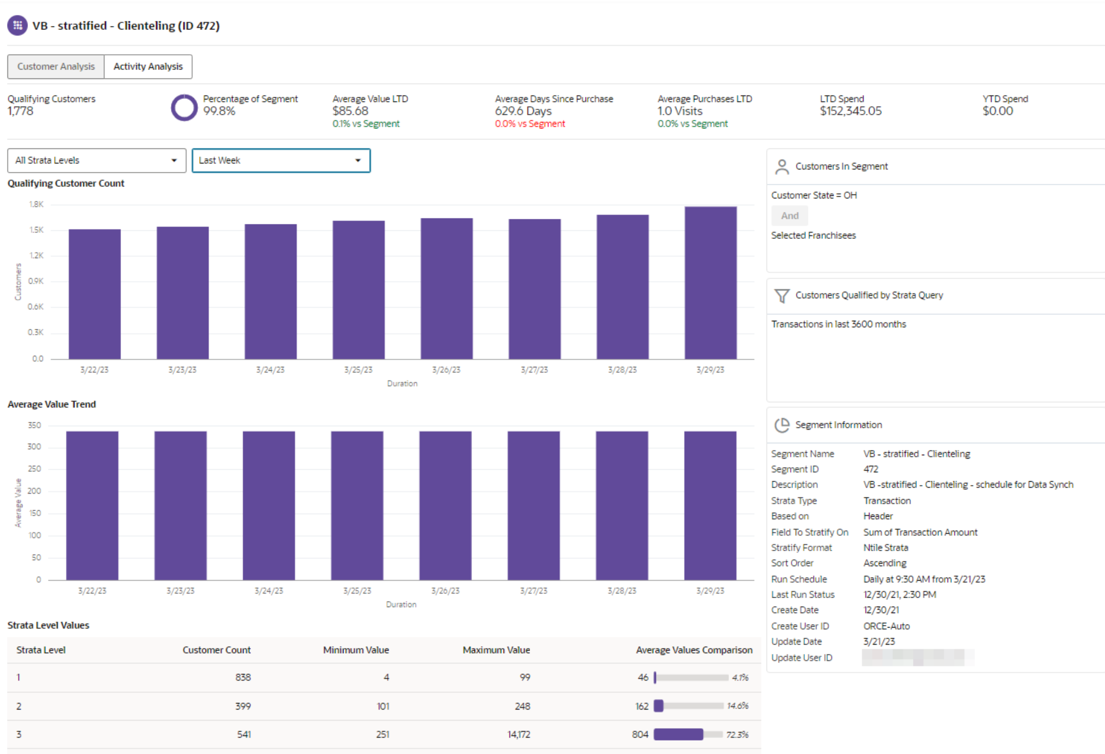
- The bar graph will dynamically update the Customer Trend based on the value selected for the Duration.
- The graph will represent a plot between the Customers Count on Y-axis and duration on X-axis for the Segment.

Segment Details Side Panel

- Customers in Segment
  - The selected templates along with their field values separated by AND/OR logic is displayed below the title.
- Segment Information
  - Segment Name
  - Segment ID
  - Description
  - Strata Type
  - Based On
  - Field to Stratify On
  - Strata Format
  - Run Schedule
  - Last Run Status
  - Create Date
  - Create User ID
  - Update Date
  - Update User ID

Activity Analysis Metrics

Figure 8-90 Segment Scorecard (Stratified) - Activity Analysis



- The following metrics and their values display above a graph.
- - Qualifying Customers - The number of customers in the analysis.
  - Percentage of Segment - The Percentage of Customers in the Segment is represented by Doughnut chart.
  - Average Value LTD - The percentage increase will display in Green color and the percentage decrease will display in Red color.
  - Average Days Since Purchase -The percentage increase will display in Green color and the percentage decrease will display in Red color.
  - Average Purchases LTD - The percentage increase will display in Green color and the percentage decrease will display in Red color.
  - LTD Spend
  - YTD Spend

Qualifying Customer Count Graph

The Qualifying Customer Count graph dynamically updates based on the values selected for the number of Strata Levels and Duration. See Duration for duration details.

Average Value Trend Graph

The Average Value Trend graph dynamically updates based on the values selected for the number of Strata Levels and Duration. See Duration for duration details.

Strata Level Values

- A list of all the Strata Levels defined for the segment display in the Strata Level selection menu. Once a selection is made (all strata levels or an individual strata) a table displays directly below the graph and includes the following values:
  - **Strata Level** - Number of the Strata Level
  - **Customer Count** - The number of Customers in the Strata.
  - **Minimum Value** - The smallest value for the field by a Customer in the Strata (will not display for Segment type = Unstratified Segment).
  - **Maximum Value** - The largest value for the field by a Customer in the Strata (will not display for Segment type = Unstratified Segment).
  - **Average Value Comparison** - The average value for the field among the Customers in the Strata.
- Duration– Durations include:
  - **Last Week** - Customer Trend for Last Week (7 days (Current date (-1)) is displayed.
  - **Last Month (Default)** - Customer Trend for Last Month (Current date (-1)) is displayed.
  - **Last 6 Months** - Customer Trend for Last 6 Months converted into weeks (Current date (-1)) is displayed.
  - **Last Year** - Customer Trend for Last 12 months (Current date (-1)) is displayed.
  - **Lifetime to Date** - Customer Trend for the last 5 years (Current date (-1)) is displayed.

Segment Details Side Panel

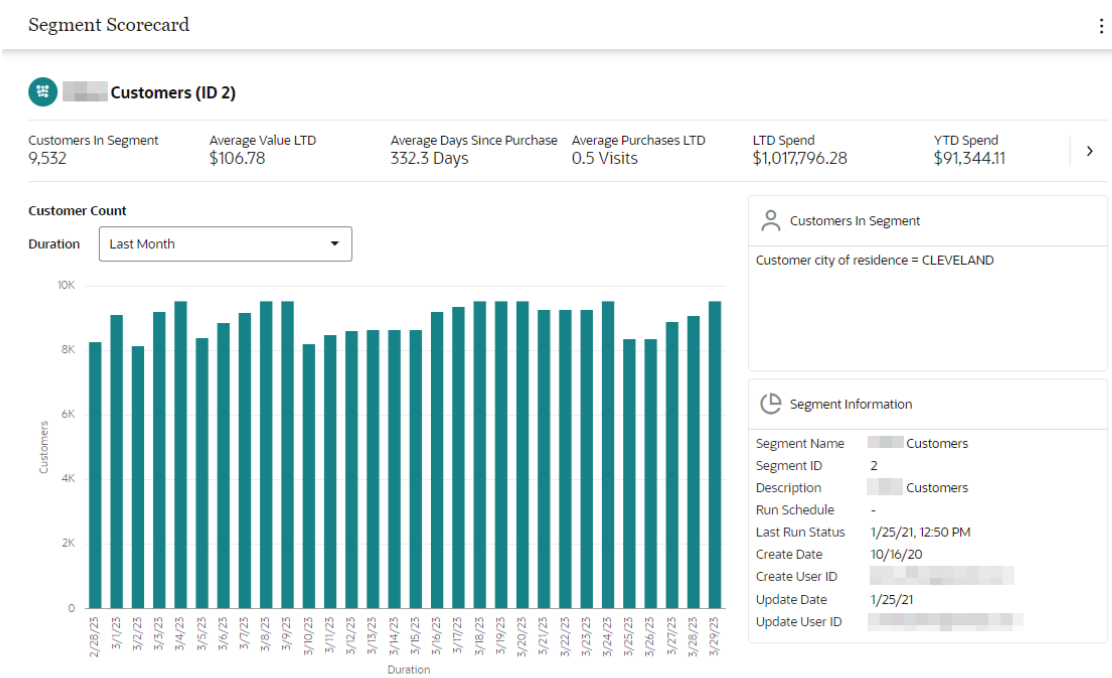
- Customers in Segment
  - The selected templates along with their field values separated by AND/OR logic is displayed below the title.
- Customers Qualified by Strata Query - The Customers Qualified by Strata Query box reflects additional strata qualifiers selected when creating a stratified segment and the Strata Type is either Loyalty or Transaction.
- Segment Information
  - Segment Name
  - Segment ID
  - Description
  - Strata Type
  - Based On
  - Field to Stratify On
  - Strata Format
  - Run Schedule
  - Last Run Status
  - Create Date

– Create User ID
– Update Date
– Update User ID

Unstratified Segment Scorecard

The Unstratified Segment Scorecard provides summary data metrics on customers in the segment.

Figure 8-91 Segment Scorecard - Unstratified



- The following metrics and their values display above a graph.
  – Customers in Segment
  – Average Value LTD
  – Average Days Since Purchase
  – Average Purchases LTD
  – LTD Spend
  – YTD Spend
- Duration– Durations include:
  – **Last Week** - Customer Trend for Last Week (7 days (Current date (-1)) is displayed.
  – **Last Month (Default)** - Customer Trend for Last Month (Current date (-1)) is displayed.
  – **Last 6 Months** - Customer Trend for Last 6 Months converted into weeks (Current date (-1)) is displayed.

  - **Last Year** - Customer Trend for Last 12 months (Current date (-1)) is displayed.
  - **Lifetime to Date** - Customer Trend for the last 5 years (Current date (-1)) is displayed.

Customer Count Graph

- The bar graph will dynamically update the Customer Trend based on the value selected for the Duration.
- The graph represents a plot between the Customers Count on Y-axis and duration on X-axis for the Segment.

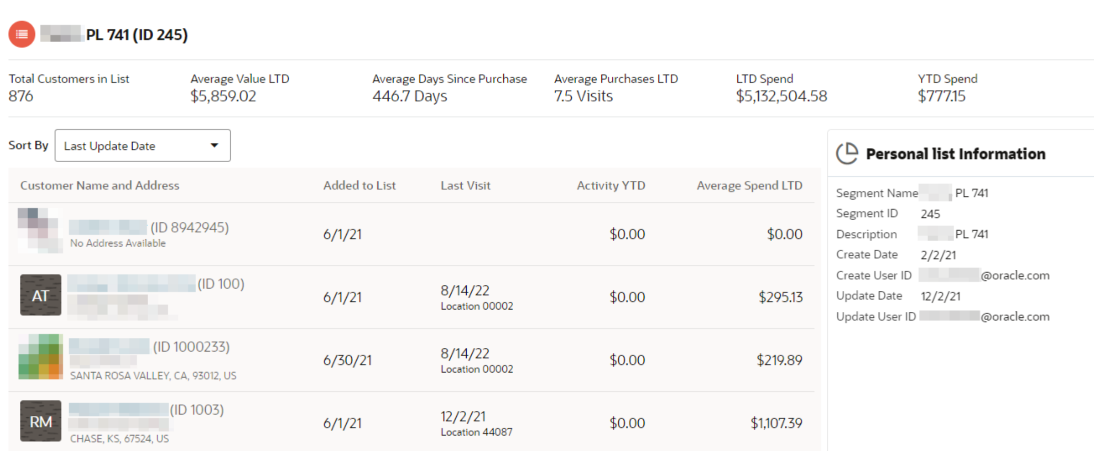
Segment Details Side Panel

- Customers in Segment
  - The selected templates along with their field values separated by AND/OR logic is displayed below the title in View only mode.
- Segment Information Panel
  - Segment Name
  - Segment ID
  - Description
  - Run Schedule
  - Last Run Status
  - Create Date
  - Create User ID
  - Update Date
  - Update User ID

Personal List Segment Scorecard

You have the ability to display the list of customers associated with the personal list, so that you can identify which customers are on the list and review their performance.

Figure 8-92 Personal List Scorecard



- The following metrics and their values display above the list of results.
  - Total Customers in List
  - Average Value LTD
  - Average Days Since Purchase
  - Average Purchases LTD
  - LTD Spend
  - YTD Spend
- Sort by - Options include:
  - Last Update Date (Customers are sorted by last updated date in descending order by default)
  - Average Spend LTD (Customers are sorted by Average Spend LTD in descending order)
  - Activity YTD (Customer are sorted by Activity YTD in descending order)
  - Last Visit (The Customer are sorted by last visit date in descending order)
  - Last Name (Customers are sorted by the Last Name in ascending order)
  - First Name (Customers are sorted by First Name in ascending order)
  - Address (Customers are sorted by Address in ascending order)
  - City (Customers are sorted by City in ascending order)
  - State (Customers are sorted by State in ascending order)
  - Added to List

Customer List

> **Note:**
>
> If more customers than can fit the window, a scroll bar displays. Select **Show More...** at the bottom of the page to retrieve more records.

- The Customer List will dynamically update the results based on the value selected for the Sort by selection menu. The Customer List headers include:
  - Customer Name, ID, and Address
  - Added to List
  - Last Visit
  - Activity YTD
  - Average Spend LTD

Personal List Information Panel

- Segment Name
- Segment ID

- Description
- Create Date
- Create User ID
- Update Date
- Update User ID

9 Registries

Overview

The Customer Item Registry allows you to set up two different types of registries:

- Gift Registry: Select the items that the recipient would like to receive - usually for a special event such as a wedding or baby shower.
- Wish List: Select items that the recipient would like to receive, without identifying a special event as with a Gift Registry

About this Chapter

This chapter contains the following information:

- Looking Up an Item Registry – Describes how to navigate to the Registries page and look up registries.
- Creating a Registry – Explains each of the five steps for creating a registry in the Registry Wizard:
  - Step 1: Information – Add the basic registry details, such as owner and type.
  - Step 2: Items – Add the items to the list for the Gift Registry or Wish List.
  - Step 3: Attributes – Add the registry attributes, if any.
  - Step 4: Addresses – Add event addresses. This only applies to Gift Registries.
  - Step 5: Review – Review the information that has been entered, make revisions if necessary, and save the registry.
- Viewing a Registry – Explains how to view a registry in read-only mode
- Downloading a Registry Report – Explains how you can download a report containing a registry's information in PDF format
- Editing a Registry – Explain the different ways to navigate to the Edit Registry page and how to edit the registry.
- Deleting a Registry – Explains how to delete a registry

Looking Up an Item Registry

There are two ways to look up an item registry. You can search all registries using the Registries icon on the main toolbar, or you can look up just the registries for a specific customer using Registries option on the Actions menu in the Customer Dashboard.

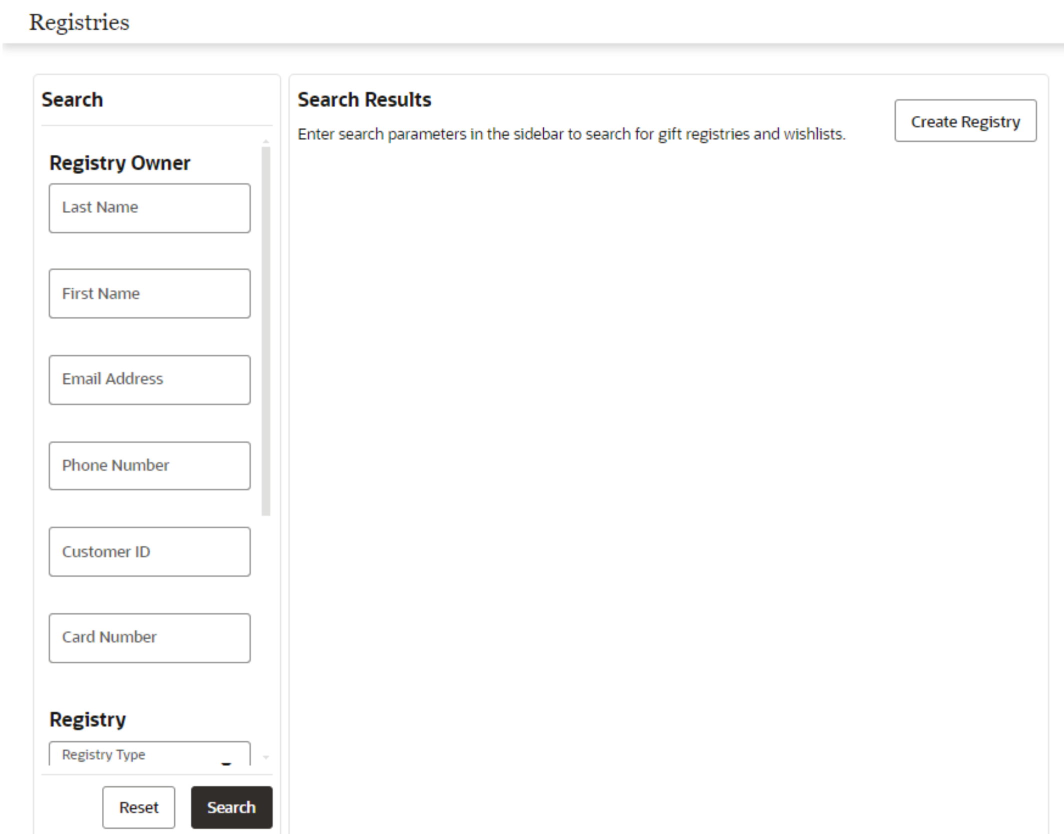
To look up a registry from the Customer Dashboard:

- From the Actions menu in the Customer Dashboard, choose the **Registries** option. This displays the list of Registries Found for the customer. See Figure 9-2.

To look up a registry from the main toolbar:

1. Click the **Tasks** icon.
2. Click **Customer**.
3. Click **Registries**. This displays the Registries page.

Figure 9-1 Registries Page



4. Enter search criteria in one or more of the following fields in the Search panel:

> **Note:**
>
> To retrieve all the active Item Registries in the system, click **Search** without entering any search criteria.
>
> To clear the search fields and restore default selections in the search page, click **Reset**.

Registry Owner

- Last Name - Last name of the registry owner.
- First Name – First name of the registry owner.
- Email Address – Registry owner's email address.
- Phone Number – Registry owner's phone number.

- Customer ID – ID of the customer who owns the registry.
- Card Number – Number for a Card associated with the customer.

Registry

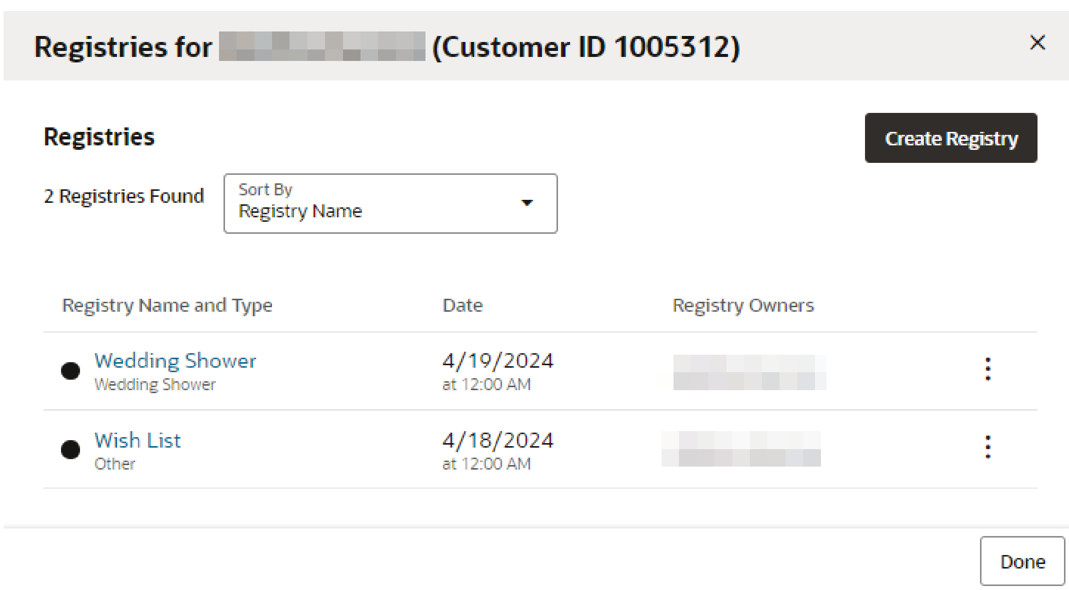
- Registry Type – Select All, Gift Registry, or Wish List from the list.
- Registry Name – Name of the registry.
- Event Type – Type of event for which the registry was created (wedding shower, for example).

> **Note:**
>
> You should not select an Event Type when searching for a Wish List, because a Wish List is not associated with an event.

- Event Date – Use the calendar to select the date on which the event occurs.
- Registry ID – The ID of the registry.

5. Click **Search**. This displays a list of registries that match the entered criteria. If you searched for the registries for one specific customer for example, by entering a complete Customer ID, you will see just that customer's registries. If you chose **Registries** from the Actions menu in the Customer's Dashboard, the registries for just that customer are displayed, as in the example following:

Figure 9-2 Registries Found List



- The number of registries that match the search criteria is shown to the left of the Sort By field.
- You can sort the registries displayed in the grid by the following options on the list:
  - Registry Name – Ascending order

- Date Created- Descending order. This field sorts only for Wish Lists.
- Registry Owner – Ascending order, by Last Name
- Number of Items – Highest to lowest

- Create Registry – Displays a Create Registry window See Creating a Registry for more information.
- The registry grid displays the following information for each registry:
  - Blue dot at the left of the Wish List or Registry Name. If filled, indicates that the wish list or registry is active. If unfilled, it is inactive. Values are

    Active – displays from the time the registry is activated to the date and time of the event.

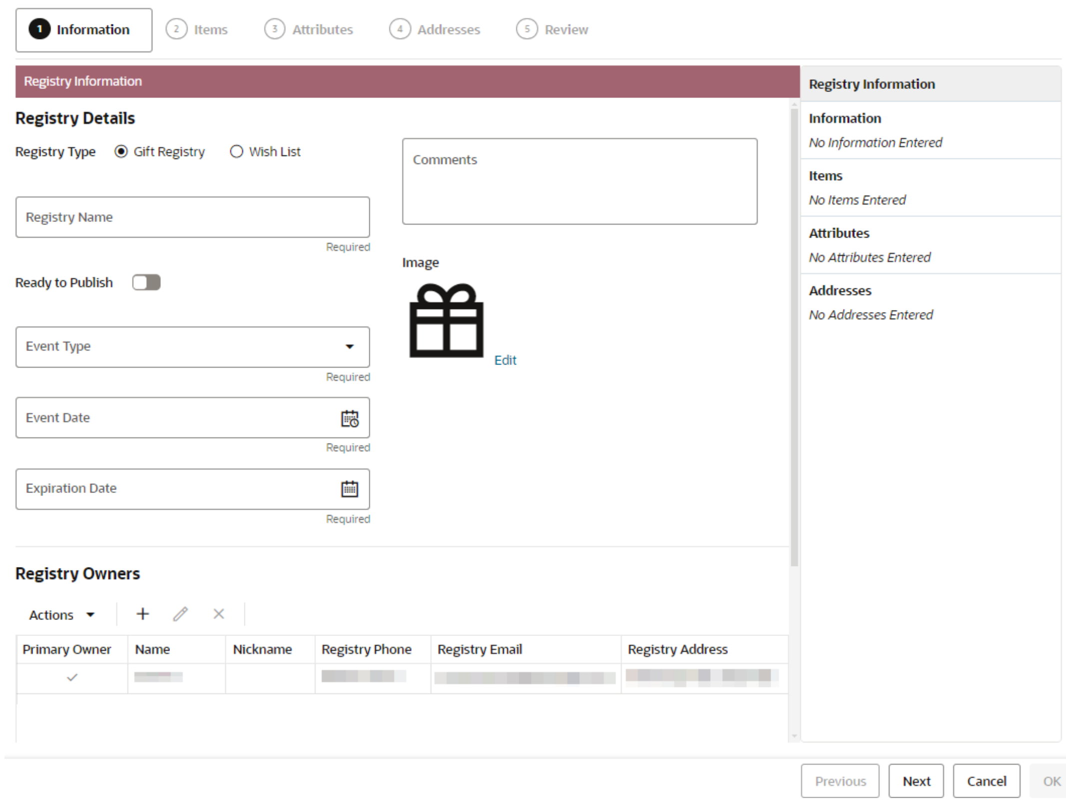
    Past – displays any time after the date and time of the event.
  - Registry Information – Shows the Registry Name and Registry Type
  - Date – The Event Date for a Registry or the Create Date for a Wish List
  - Registry Owners – The name of the Primary customer who owns the registry first, with any other owners subsequently.
- An action menu icon is displayed at the end of each row. It has these options:
  - Delete – Select to delete the registry. See Deleting a Registry.
  - Download Report – Select to download a report with information about the registry. See Downloading a Registry Report.
  - Edit – Select to edit the registry. See Editing a Registry.
- You can view registry details by clicking the name of the registry in the grid.

Creating a Registry

Step 1: Information

1. From the Actions menu on a Customer's Dashboard, choose **Registries**, or click the **Registries** icon to display the Registries window, and click Create **Registry**. Either action displays the Create Registry Wizard.

Figure 9-3 Create Registry Wizard



The progress bar at the top indicates that you are located at step 1, Information. As you progress, the Create Registry Wizard moves you through each of the five steps.

2. Under Registry Details, Select the **Registry Type**. A Gift Registry is tied to an event, while a Wish List is open-ended. This is mandatory.
3. Enter a **name** for the registry in the Registry Name field. This is mandatory.
4. If the **Ready to Publish** switch is **activated**, it indicates that the registry is available for export to a third party when the registry is saved
5. If the Registry Type is Wish List, there are no other mandatory fields under Registry Details. If the Registry Type is Gift Registry, also make selections for these mandatory fields:

   Event Type – Select an Event Type from the list.

   Event Date – Select the date and time of the event from the calendar.

   Expiration Date – Select the date that the registry expires, from the calendar.
6. Optionally, you can enter **comments** about the registry in the Comments field.
7. Optionally, you can add an **image** that represents the Gift Registry. Click **Edit** next to the logo in the Image field to display an Edit Registry Image prompt that lets you **drop or upload** a **new image**. This is only available for Gift Registries.
8. Under Registry Owners, choose **Add** from the **Actions Menu**, or click the **Add Icon**. Either action displays the Add Registry Owner window:

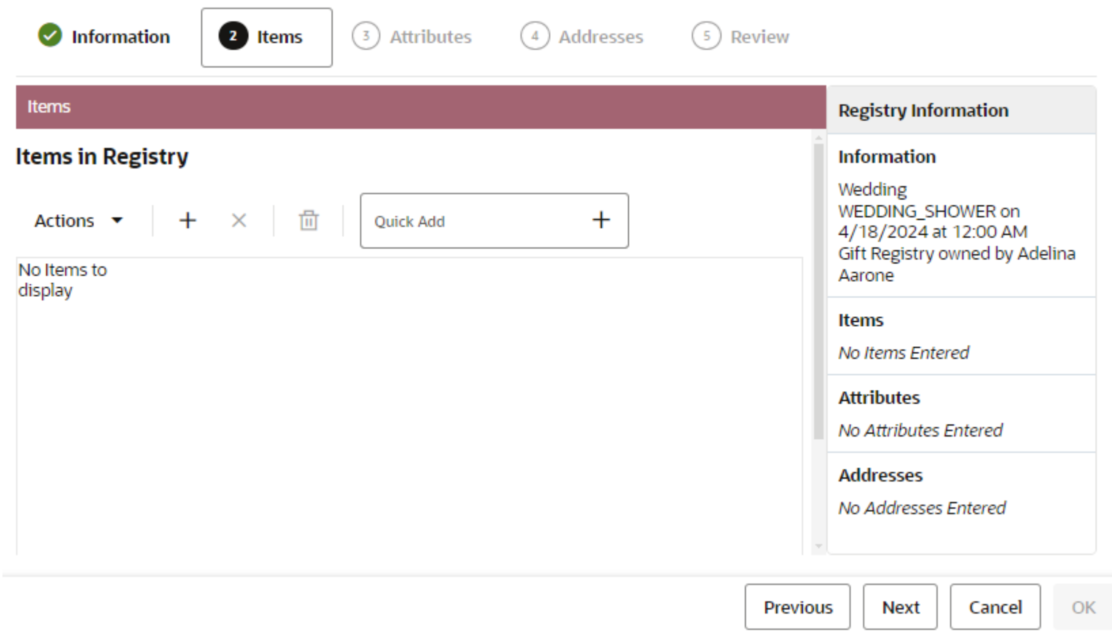
Figure 9-4 Add Registry Owner

as5

9. In the search field at the top of the window, enter search criteria such as customer name or ID. A list of customers matching the search criteria is displayed. Select the customer for whom you are creating the registry. This displays the Name, ID, Alternate Key, and primary contact information of the selected customer under the search field. When you select a customer, the window is populated with available information about the customer.
10. Add any details that are missing. The following information can be entered, with mandatory fields marked by asterisks (*):
    - Primary – Indicates whether this customer is the primary owner of the registry.
    - Nickname –Enter an optional nickname for the registry owner.
    - Phone – Information about the registry owner's phone number:
      – The Phone switch defaults to On. If this switch is set to Off, the following fields are not displayed.
      – Registry Phone – Select the type of phone number being used for the registry from the list, or select Create New to enter a new phone number.
      – Phone Number – The registry phone number. This field is mandatory.
      – Extension – the extension of the registry phone number, if applicable.
      – User Label – Enter an optional user label for the registry phone number
    - Email – Information about the registry owner's email address:
      – The Email switch defaults to On. If this switch is set to Off, the following fields are not displayed.
      – Registry Email – Select the type of email address being used for the registry from the list, or select Create New to enter a new email address.
      – Email – The registry email address. This field is mandatory.
      – User Label – Enter an optional user label for the registry email address
    - Address – Information about the registry owner's address:
      – The Address switch defaults to On. If this switch is set to Off, the following fields are not displayed.
      – Registry Address - Select the type of address being used for the registry from the list, or select Create New to enter a new address.
      – Country – Select the country of the registry form the list.
      – Address 1-4 –The street address of the registry. Address 1 is mandatory
      – Apartment – The apartment number of the registry, if applicable.
      – City – The city of the registry. This field is mandatory.
      – State – The state or province of the registry. This field is mandatory.
      – Postal Code – The postal code of the registry. This field is mandatory.
      – County – The County of the registry.
11. Click **OK** when you are finished entering the customer details. This returns you to the Create Registry window. The customer information is displayed in the Registry Owners list. If you are done entering registry information, click **Next** to go to Step 2: Items.

Step 2: Items

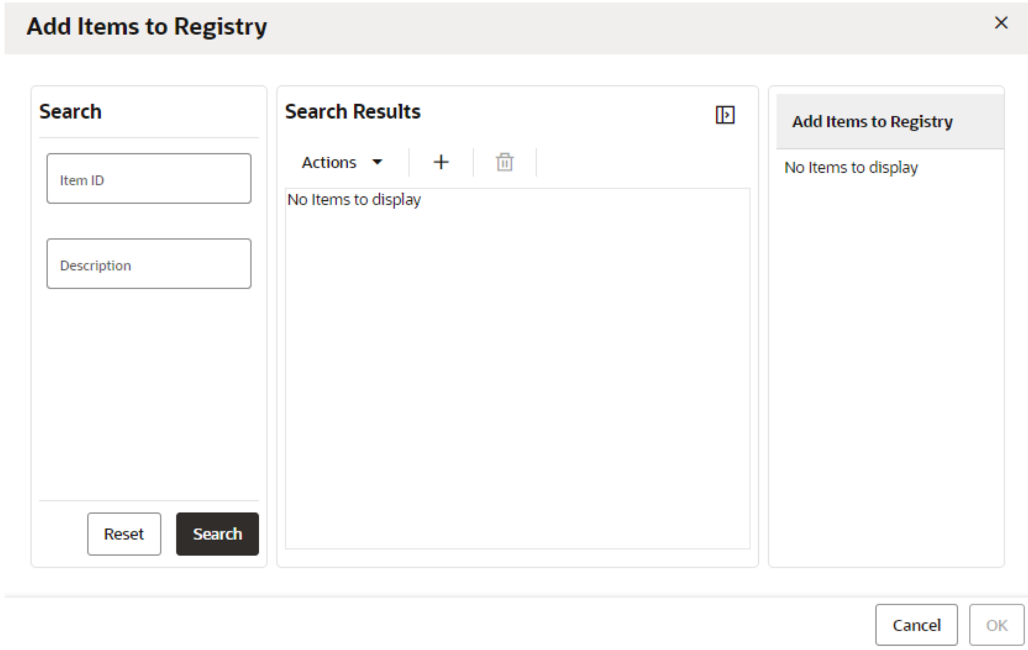
Figure 9-5 Create Registry Items



To add items to a Registry:

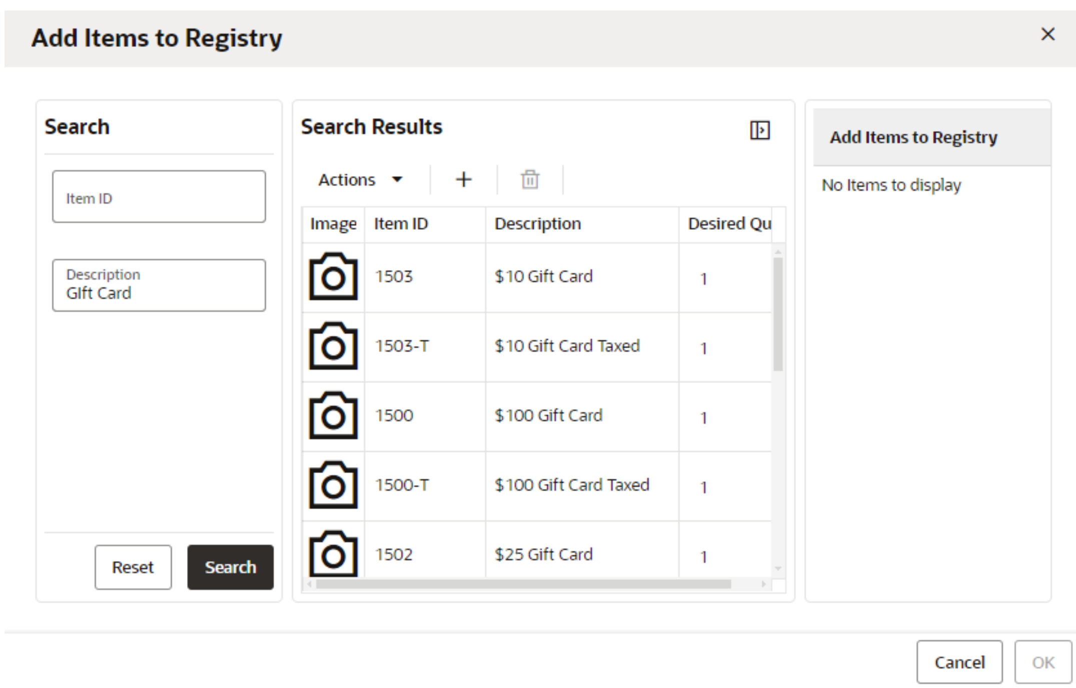
1. There are two methods for adding items to a registry, using the **Add** command to display the Add Items to Registry dialog, where you can search for items, or by entering the exact **Item ID** in the Quick Add field:
   - Under Items in Registry, choose **Add** from the Actions menu, or click the **Add Icon**. Either action displays the Add Items to Registry dialog:

Figure 9-6 Add Items to Registry



2. In the Search panel, enter an **Item ID**, **Description**, or **both** in the provided fields and click **Search**. This displays a list of items matching the search criteria in the Results panel. If you want to clear a search, click **Reset**. Use the Search panel to add more items.
3. The Results panel displays the Image, Item ID and Description of the items in the search results:

Figure 9-7 Search Results



If you want to specify the desired quantity of this item, use the Increment and Decrement arrows to increase or decrease the quantity. The Desired Quantity value defaults to 1.

4. If you want to add an item from the Results panel to the Registry, select the item and choose **Add** from the **Actions Menu**, or click the **Add (+) Icon**. Items that you add are displayed in an Add Items to Registry panel on the right side of the page. To remove all items from the list, choose **Remove All** from the Actions menu or click the **Remove All** icon.
5. Click **OK** to add items. The selected items are added to the Items in Registry list on the Items tab.

   Or use this alternate method:

   - In the Quick Add field, enter the exact **Item ID** and click **+**. If the exact match is found, the item is added to the Items in Registry table. If the item is not found, the message `No item found with this ID.` displays.
   - If the item is found, the Image, Item ID and Description of the item and a Desired Quantity field are displayed. The default quantity is 1. You can change the quantity using the Increment and Decrement arrows to increase or decrease the quantity.
6. When you are done adding items to the registry, click **Next** to go to Step 3: Attributes.

Step 3: Attributes

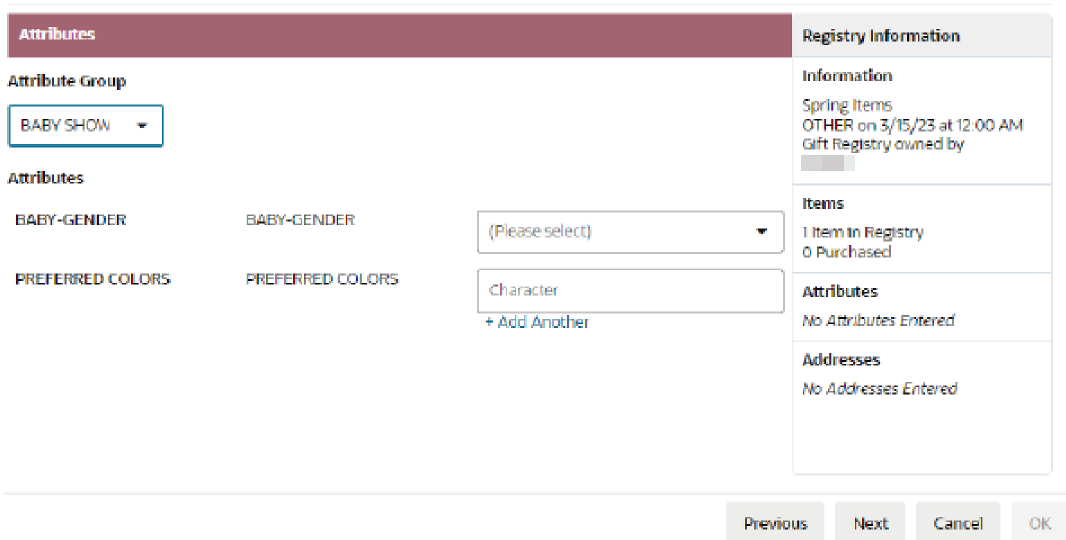
Figure 9-8 Registry Attributes

To add attributes to a registry:

1. Select a group from the Attribute Group list. A list of attributes specific to the selected Attribute Group is displayed.

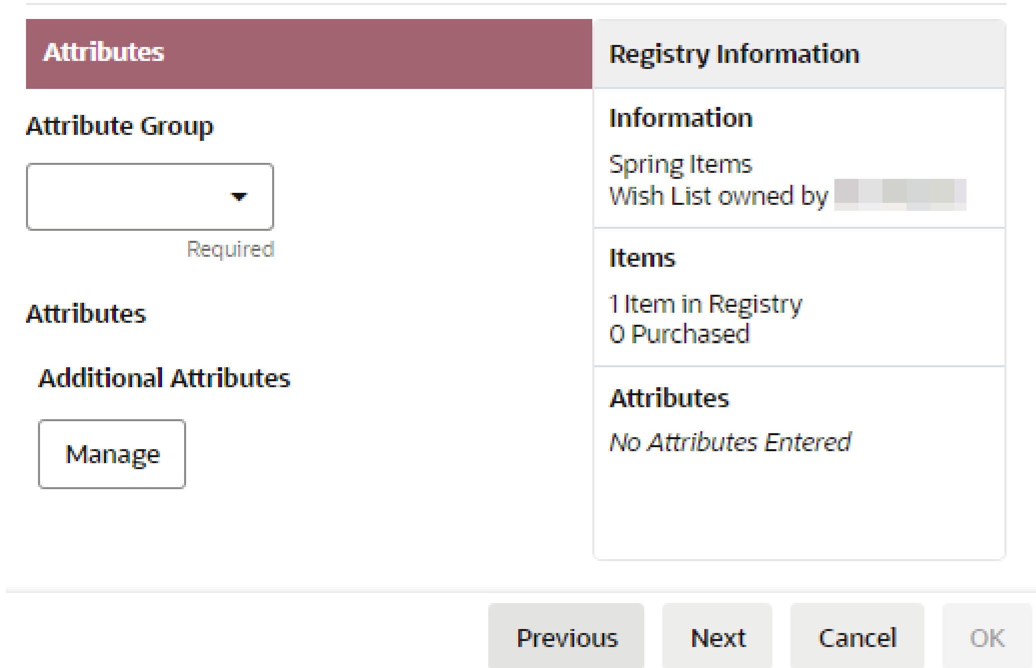
> **Note:**
>
> This step is optional unless specific attributes are included in a group and you want to select any of them.

Figure 9-9   Attributes List



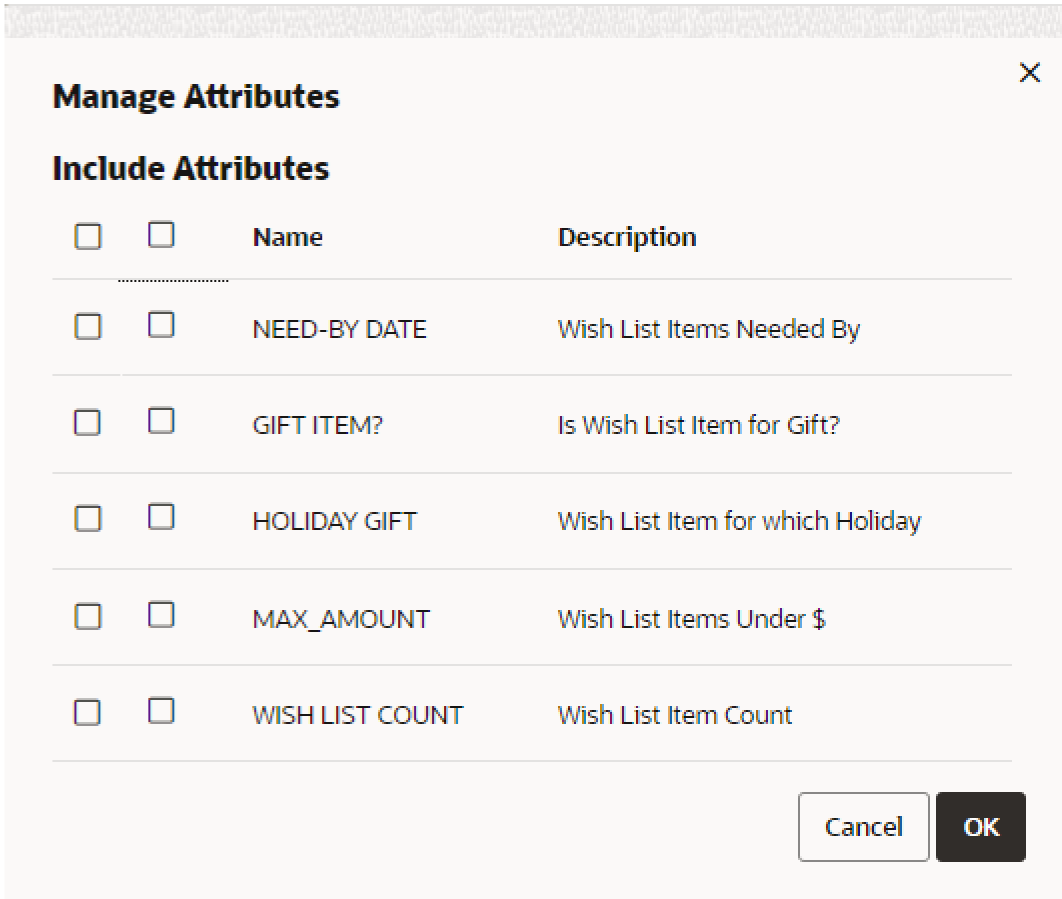
2. If you selected an Attribute Group, the attributes belonging to that group are listed in the Attributes grid. Enter values for the attributes you want applied to the registry. You must enter a value for each required attribute (indicated by an asterisk*).
   - The grid displays the name, description and value entry field for each attribute.
   - Attributes are displayed by group, with mandatory attributes displayed first.
   - Attribute value entry fields will initially indicate the type of value to enter, for example, (Please select) for a list of items.
   - If there is more than one possible value for the attribute, there is a + Add Another link under the attribute value entry field. Click the **+ Add Another** link if you have entered a value and need to add another. This displays a duplicate entry field for the attribute.
   - A value can only be removed if an **X** appears next to it. The **X** is only displayed if the value can be removed.
3. If you want to add attributes not assigned to the available Attribute Groups, click the **Manage** button under Additional Attributes.

Figure 9-10   Attributes: Wish List



> **Note:**
>
> This is only available for Wish Lists. This displays a Manage Attributes window:

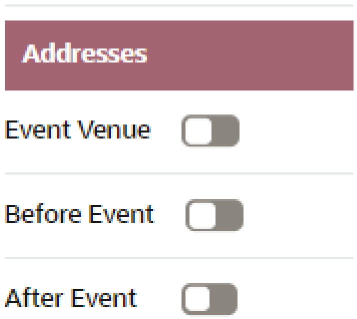
Figure 9-11 Manage Attributes



4. Click the check box next to the Name and Description header row to select all of the attributes, or select the check box next to each attribute that you want to include, and click **OK**. The selected attributes are display beneath Manage.
5. If you have added attributes using the Manage Attribute window, specify values for those attributes.
6. When you are done selecting attributes and entering values, click **OK**.
7. Click **Next** to go to Step 4: Addresses.

Step 4: Addresses

Figure 9-12 Addresses



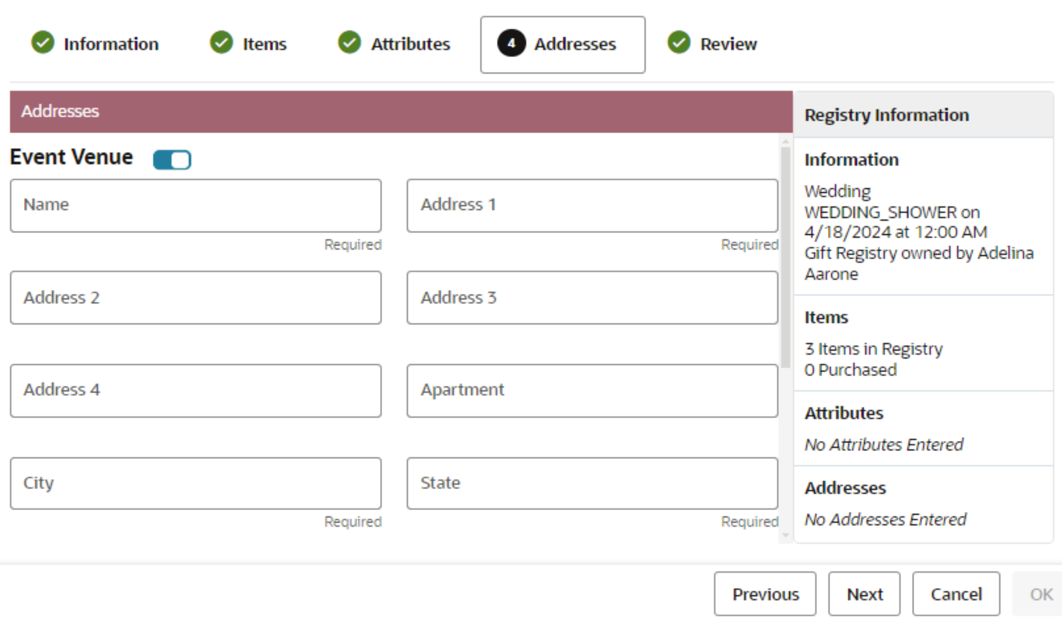
Note:

This section only applies to Gift Registries.

To add Addresses:

1. Click the **switch** next to an address type to **On** to display a list of fields associated with that address. To hide the fields, set the **switch** to **Off**. The following example shows the fields associated with the Event Venue address. Fields marked with an asterisk (*) are mandatory:

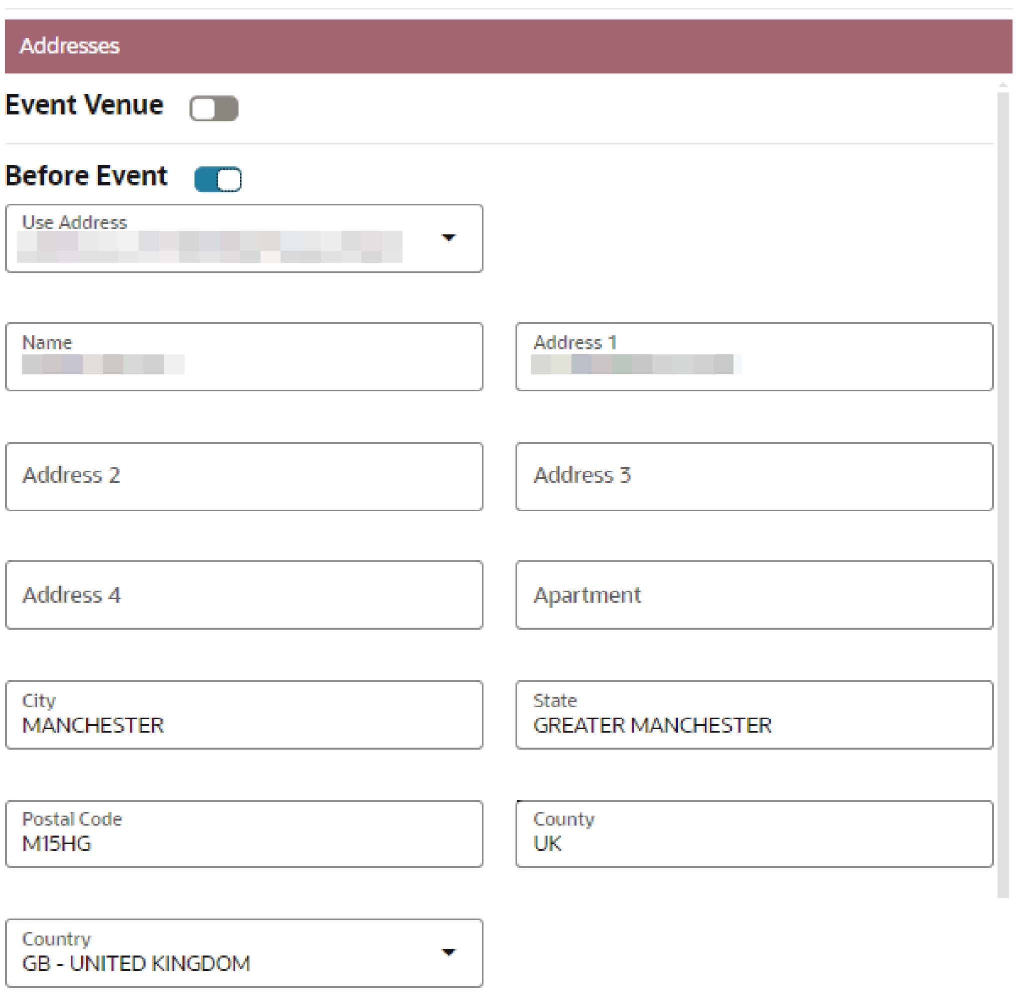
Figure 9-13 Event Venue Address



2. Enter information in the fields.
   - Name – The name of the event venue. This field is mandatory.
   - Address 1-4 – The street address of the venue. Address 1 is mandatory.
   - Apartment – The apartment number, if applicable.
   - City – The city of the venue. This field is mandatory.
   - State – The state or province of the venue. This field is mandatory.
   - Postal Code – The postal code of the venue. This field is mandatory.
   - County – The County of the venue.
   - Country - The country of the venue. Choose a country from the list

     If there is a Use Address field for the event, as in the following example, select a name from the list. This will populate the remaining fields:

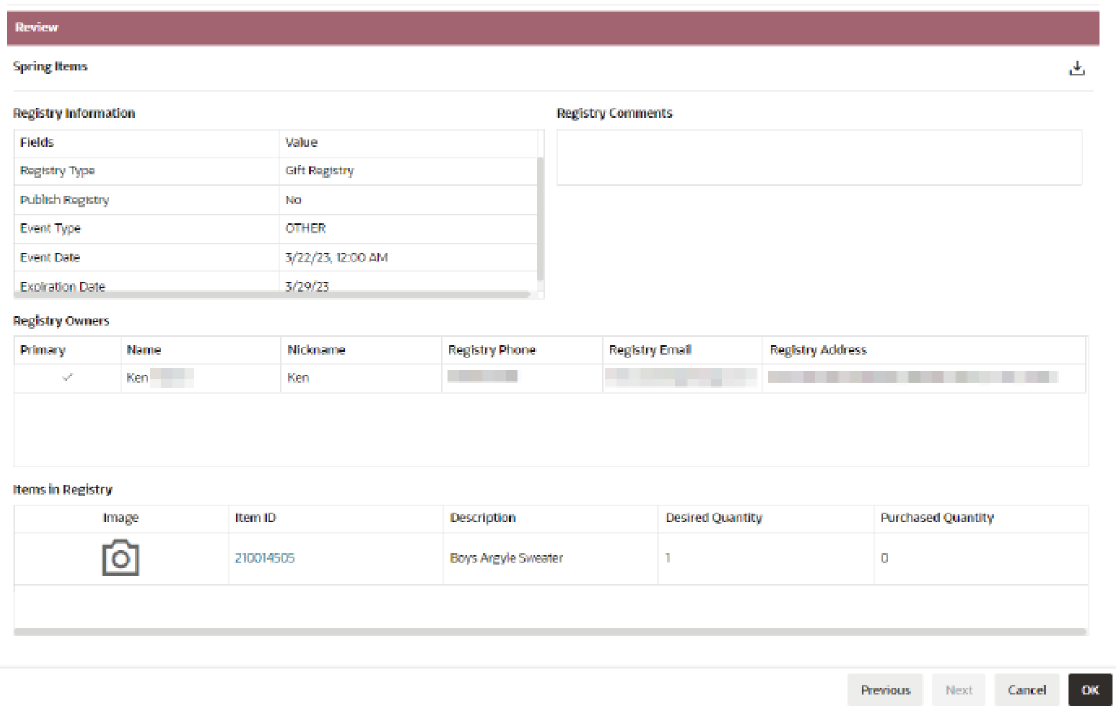
Figure 9-14 Address Fields



3. When you are done entering addresses, click **OK**.
4. Click **Next** to go to Step 5: Review. This displays a page where you can review all the information you have entered for the registry.

Step 5: Review

Figure 9-15 Review



To review the registry:

1. Look over the information in the review page. If there is anything you want to change, click the step located in the top bar where the information was first entered. For example, click **Information** to return to the Information window. To navigate to the previous step, click **Previous**.
2. Make the changes to the information. For example, if you want to publish the registry, go back to the Information window and select the **Ready to Publish** check box. This ensures that the registry is published the next time it is saved.
3. Click **OK** to save your changes in each window.
4. Click **Review** located in the top bar, and then click **OK** in the Review window when complete. This saves the registry, and it now appears in the list of registries for the customer.

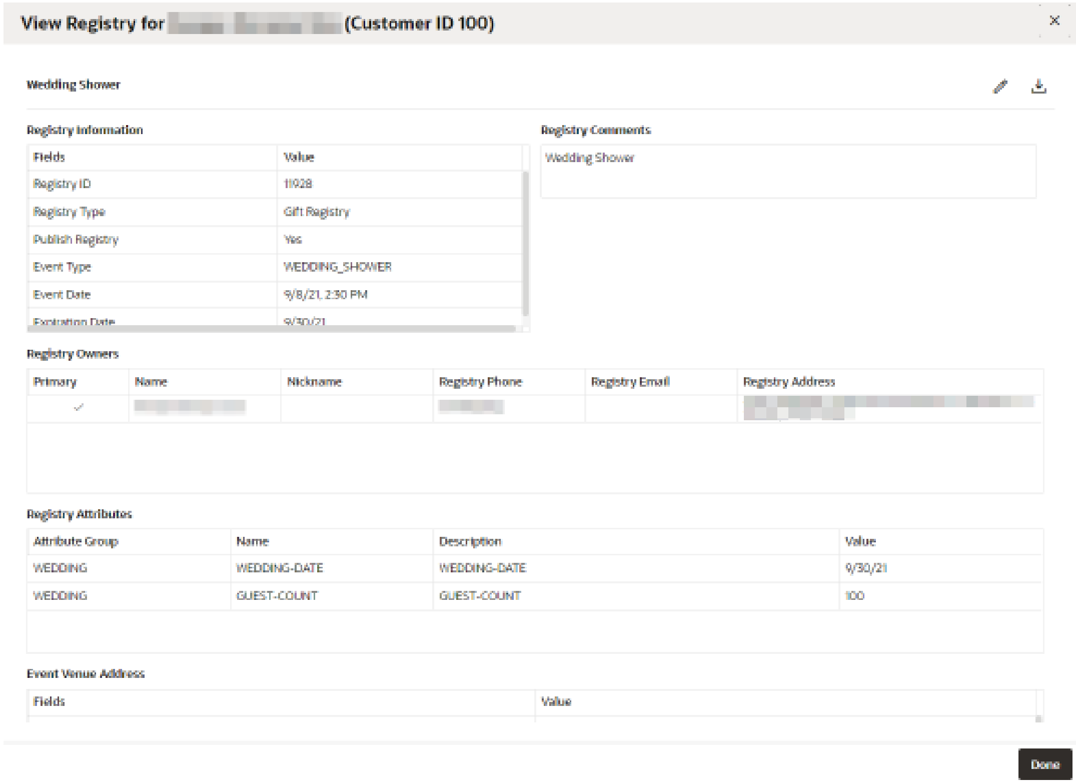
Viewing a Registry

To View a Registry

1. In the Registries Found list (See Figure 9-2), click the **name** of the registry you want to view.

   This displays the registry details in view-only mode:

Figure 9-16 View Registry



2. View the items in the registry. You can use the scroll bar to view hidden information.

   The following information can be displayed, depending on what has been entered and saved for the registry:

   - Customer Bar
     - Title (View Registry for
     - Primary Owner Customer Name
     - Primary Owner Customer ID
   - Display Bar
     - The Registry Name
     - Icons for editing the registry and downloading the registry report
   - Registry Information – This table contains the following listed Fields and Values, if they have been entered
     - Registry ID
     - Registry Type
     - Publish Registry
     - Event Type – This is displayed for Gift Registries only
     - Event Date – This is displayed for Gift Registries only
     - Expiration Date – This is displayed for Gift Registries only
   - Comments – any comments entered about the registry
   - Registry Owners

  - Primary – The primary owners are displayed first, with any subsequent owners after.
  - Name
  - Nickname
  - Registry Phone
  - Registry Email
  - Registry Address – (also known as) Contact Address
- Items in Registry – For each item in the registry, this information is displayed:
  - Image
  - Item ID - The item ID has a link, that when clicked, displays a window with detail information.
  - Description
  - Desired Quantity
  - Purchased Quantity
- Attributes
  - Group
  - Name
  - Description
  - Value
- Event Venue Address – Displayed for Gift Registries only.
  - Name
  - Address 1-4
  - Apartment
  - City
  - State
  - Postal Code
  - County
  - Country
- Before Event Address – Displayed for Gift Registries only.
  - Name
  - Address 1-4
  - Apartment
  - City
  - State
  - Postal Code
  - County
  - Country
- After Event Address – Displayed for Gift Registries only.

- Name
- Address 1-4
- Apartment
- City
- State
- Postal Code
- County
- Country

3. Click **Done**. This returns you to the Registries Found list.

Downloading a Registry Report

To download a registry report either:

- In the Registries Found list (see Figure 9-2), click the Actions Menu in the row of the registry for which you want to download a report, and choose the **Download Report** option.
- In the Edit Registry Review or View Registry page, click the **Download Report** icon.

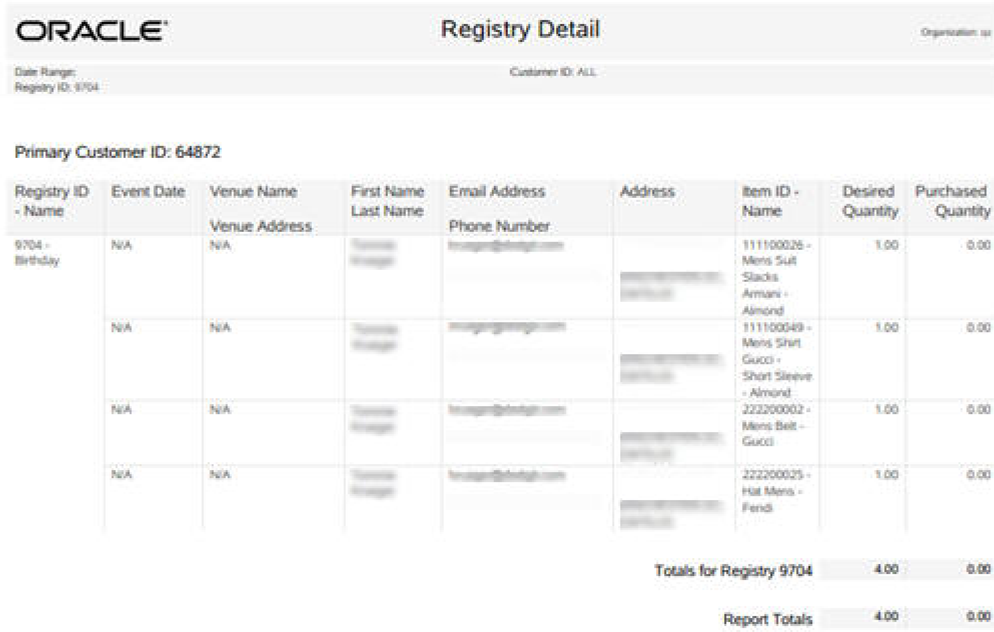
Either action displays a prompt for saving or running the report with these options:

- The steps in the prompt can vary based on the browser that is being used.
- The report is available in PDF format
- The steps in the prompt can vary based on the browser that is being used.

Registry Report Output

The following example shows the output of a downloaded registry report:

Figure 9-17 Registry Report



The Registry Report contains the following information:

Header Information

- Organization - The code identifying your organization.
- Date Range - The date range selected when generating the report.
- Customer ID - The numeric ID for the Customers selected when generating the report. Displays ALL if there was no restriction when running the report.
- Registry ID - The numeric ID for the Registries or Wish Lists selected when generating the report. Displays ALL if there was no restriction when running the report.

Detail Information

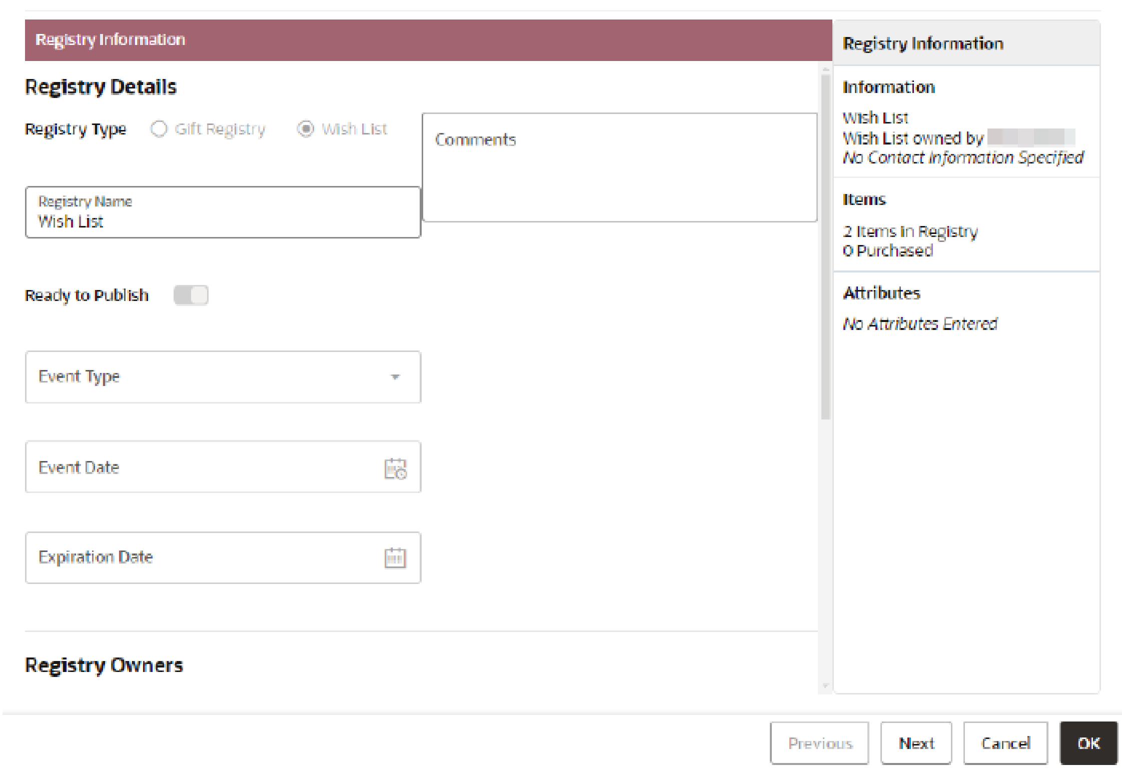
- Primary Customer ID - The unique numeric identifier for a Customer.
- Registry ID - Name - The unique numeric identifier for a Registry or Wish List, and the Name describing the Registry or Wish List.
- Event Date - The date for an Item Registry. Set to N/A for a Wish List. Repeated for each Item for the Registry.
- Venue Name and Venue Address - The Venue Name and Address for an Item Registry. Set to N/A for a Wish List. Repeated for each Item for the Registry.
- First Name and Last Name - The primary Customer's first and last name. Repeated for each Item for the Registry or Wish List.
- Email Address and Phone Number - The primary Customer's email address and phone number, as specified for the Registry or Wish List.
- Address - The primary Customer's address, as specified for the Registry or Wish List.

- Item ID - Name - The ID and Name of the Item on the Registry or Wish List.
- Desired Quantity - The desired quantity of the Item.
- Purchased Quantity - The purchased quantity of the Item.
- Totals for Registry:
  - Desired Quantity - The total desired quantity of all Items on the Registry or Wish List that are included on the report.
  - Purchased Quantity - The total purchased quantity of all Items on the Registry or Wish List that are included on the report.
- Report Totals:
  - Desired Quantity - The total desired quantity of all Items included on the report.
  - Purchased Quantity - The total purchased quantity of all Items included on the report.

Editing a Registry

If you need to edit a Registry, click the **Edit Icon** in the View Registry window (see Figure 9-14) or, in the Registries Found list, (see Figure 9-2), or click the **Actions menu** in the row of the registry you want to edit, and choose the **Edit** option from the menu. Each action displays the registry in an editable window:

Figure 9-18 Edit Registry



You can review registry details and edit fields that are editable. Click **Next** to progress through the Edit Registry windows, or click the **Step Icons** located in the top bar. Use **Previous** to return to the previous window.

The Edit Registry window displays the same information as that in the Create Registry window, although not all fields are editable. For more information about entering the fields in a registry, see Creating a Registry.

Information in the Edit Registry windows includes that displayed in the Create Registry windows with these variations:

Information

- Title Bar
  - Title (Edit Registry for)
- Registry Details
  - Registry Type – this is not editable
  - The rest of the fields are editable
- Items
  - The Purchased Quantity for this registry is displayed on the right of the Desired Quantity field. This field is not editable
  - The rest of the fields are editable
- Attributes
  - All fields are editable
- Addresses
  - All fields are editable

Review

- Header Information
  - Displays Edit Registry for Customer name (Customer ID)
  - The Create User ID, Create Date, Update User ID, and Update Date are displayed next to the Registry Name

When you are done editing the Registry, click **OK** to save the changes.

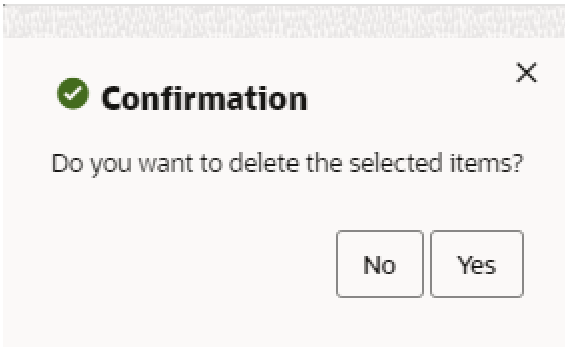
For more information about entering the fields in a registry, see Creating a Registry.

Deleting a Registry

To delete a registry:

1. In the Registries Found List , click the **Actions Menu** in the row of the registry you want to delete.
2. Choose **Delete** from the menu, this displays a Confirmation prompt:

Figure 9-19 Confirmation Prompt



3. Click **Yes** to delete the registry.

10 Programs

The Programs feature provides the ability to manage various programs to use in a retail environment in order to create customer loyalty. A card will be defined to hold one or more programs. The card may be a physical or electronic (used online only) card. Each defined card can associate one or more programs for the customer to use. These programs consist of three types: Tender, Award and Loyalty. Various rules and parameters can be defined for managing the program. You can use this chapter to define and manage the cards and programs used in retail locations.

Customer Engagement has the following types of Programs:

- **Tender Program -** Tender Programs define rules for gift cards or stored value cards. Only one tender program can exist on a card.
- **Award Program -** Award Programs are used to hold the awards a customer can use in the retail location. An Award Certificate can be defined with an entitlement offer that has rules on when and where the offer can be used. Additionally, an award currency value can be stored for use toward purchases in the retail store. Multiple award programs can exist on a card.
- **Loyalty Program -** Loyalty Programs are used for issuing points based on various customer activities such as purchases they make. Awards such as paper coupons, award certificates (with entitlement offer) and e-awards (with currency value) can be issued to the customer when they have earned a set amount of points. The points earned can then be used to redeem the award in a retail location. Loyalty Levels can be used to create a tiered structure to offer better benefits to the customer when they shop more frequently. An Award Program is required and used in conjunction with the loyalty program to hold the Award Certificates and the E-Award value earned based on rules defined in the loyalty program. Multiple loyalty programs can exist on a card.

About this Chapter

This chapter contains the following information:

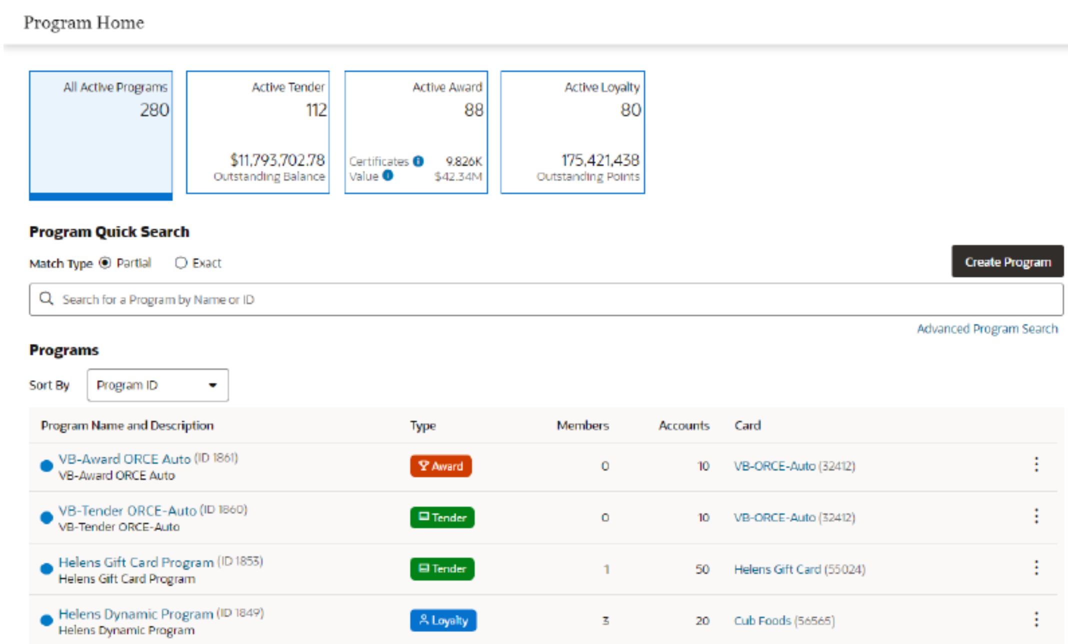
- Program Quick Search
- Advanced Program Search
- Creating a Program
- Editing Programs
- Viewing Programs
- Cards
  - Viewing Cards
  - Editing Cards

Program Quick Search

Program Quick Search displays a list of results as you type in characters in the search box. To use the Program Quick Search do the following:

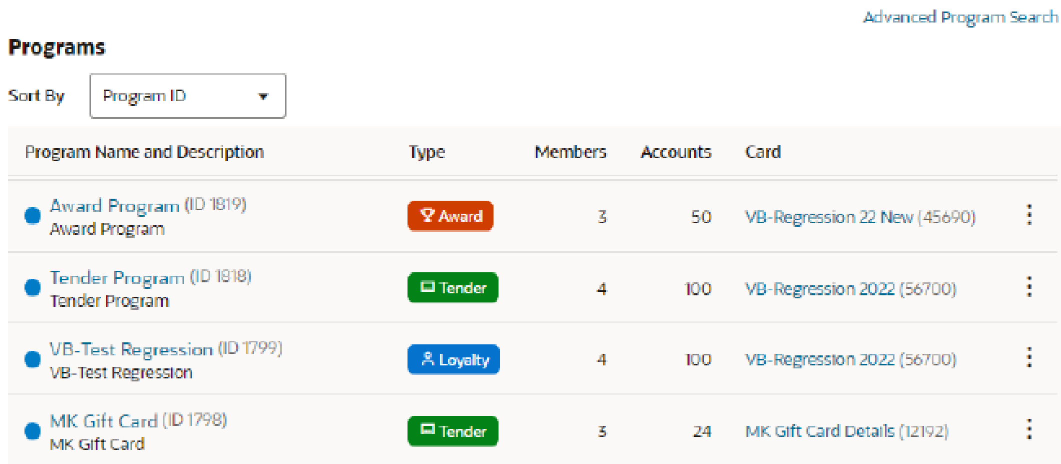
1. Click **Tasks**.
2. Click **Program**.
3. Click **Program Home**.

Figure 10-1 Program Home - All Active Programs Metric Tile



4. Select a **Metric Tile**, options include:
   - All Active Programs
   - Active Tender
   - Active Award
   - Active Loyalty
5. In the Search for Program field, enter the **Name** or **ID** of the Program you want to search for. Click **Partial** to search for Programs that partially match the search text, or click **Exact**, to search for an exact match.

Figure 10-2 Program Results

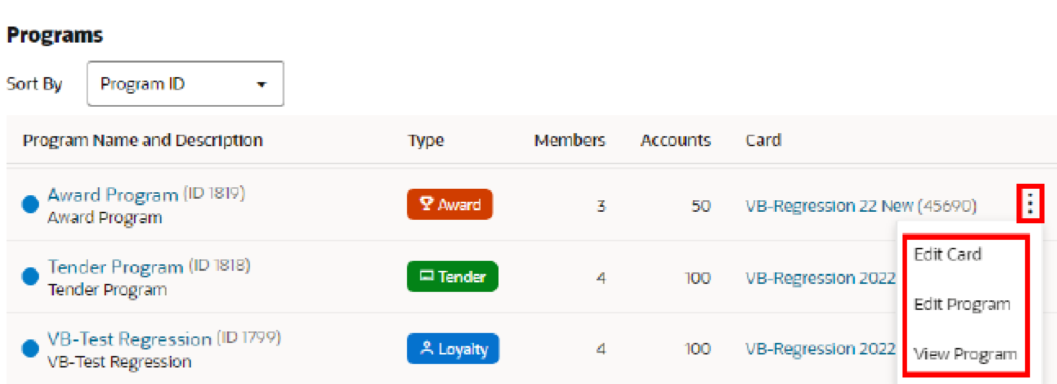


The search results display the following fields:

- Name and Description - Name and description of the program.
- Type - Program Type
- Members - Displays the number of registered customers in Customer Engagement.
- Accounts - Displays the number of individual accounts created for the program. The count will include all accounts created on the card for the program. This can include registered customers, unregistered (anonymous) customers and cards that have not be issued to anyone.
- Card - Name of Card.

6. Hover over any of the icons in the **Name and Description** column to see a tooltip listing the status of the Program as shown in Figure 10-2.
   - **Active** - Filled
   - **Inactive** - Empty
7. Click the **Card** name link for any Program to view the details. See Viewing Cards for more information. Use the Action Menu to Edit Card, Edit Program, or View Program. See Editing Cards, Editing Programs, or Viewing Programs for more information.

Figure 10-3 Action Menu Options - Program Quick Search

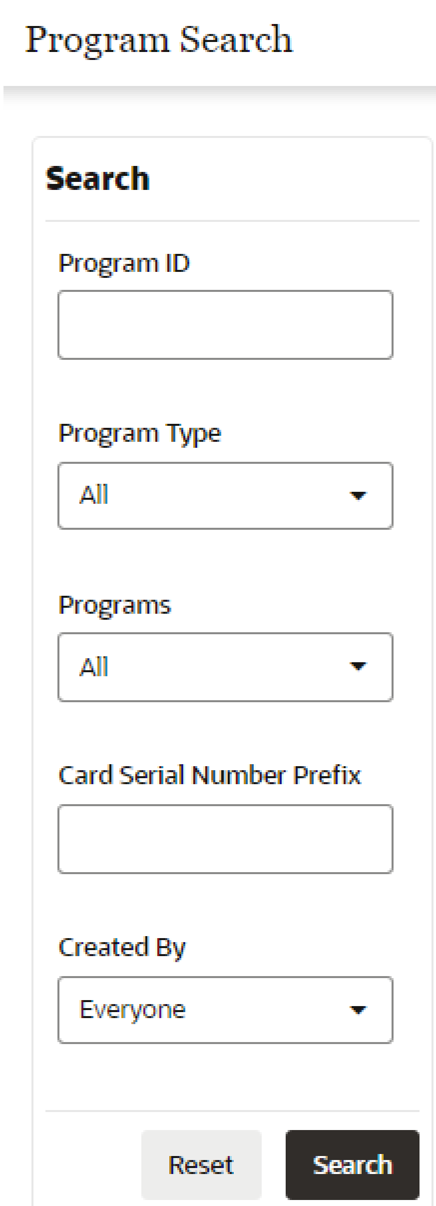


Advanced Program Search

The Advanced Program Search allows you to select more criteria that are not available in the Program Quick Search box. The Advanced Program Search is accessed by the following methods:

- Click the **Advanced Program Search** link located underneath the Program Quick Search box in the Program Home window.
- Click **Program Search** in the Program Task menu. See Navigation for more information.
- Click the **Program Search** icon in the Quick Access Menu. See Navigation for more information.

Figure 10-4   Program Search Advanced Search Window



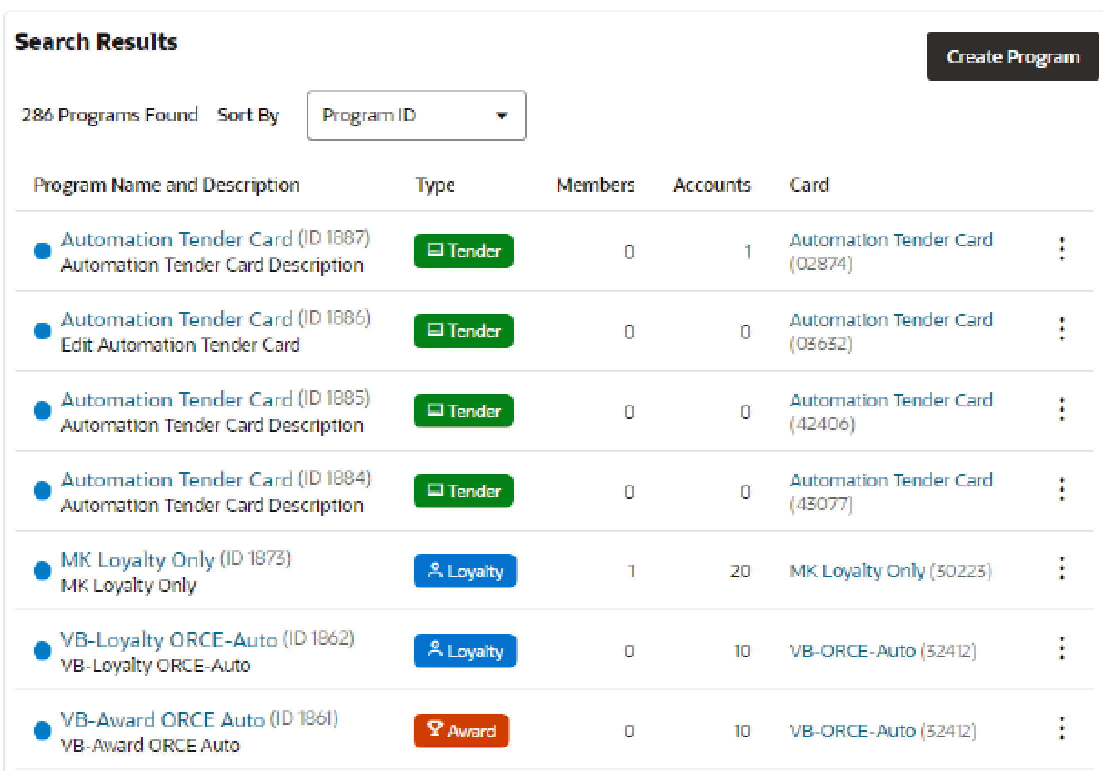
The following Search fields are available:

- **Program ID -** This Text Field searches all the Progams currently present in the application. The default is an empty field.
- **Program Type** - Search by Program Type. The field defaults to All.
  - All
  - Award
  - Loyalty
  - Tender
- **Programs** - Search the Program by the status. The field defaults to All.
  - All
  - Active
  - Inactive
- **Card Serial Number Prefix** - Your entry must be exactly five characters.
- **Created By** - List of users who have created programs. The field defaults to All. Use this to search for program types a user personally created.

Searching Programs

Once all the desired information has been entered, click **Search** to see the results.

Figure 10-5 Program Search Results



> **Note:**
>
> Click **Reset** to clear all fields and return list values to the default selections. Without entering any criteria, click **Search** to see a complete list of programs.

Sorting Program Results

The sort options will re-sort just the current 25 programs displayed in the window. Sorting options include:

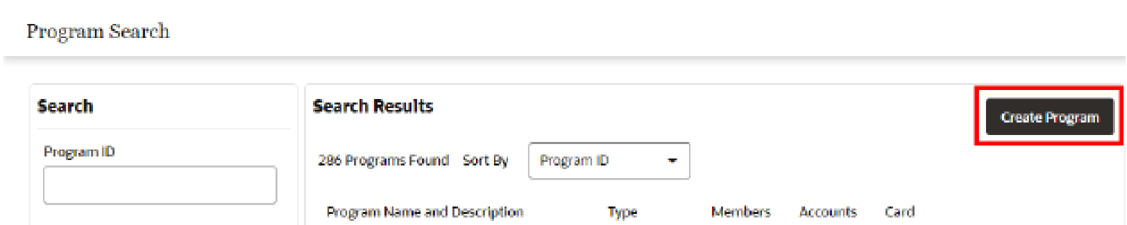
- **Program ID** - Program results are sorted by Program ID in descending order by default.
- **Program Name** - Program results are sorted by Program Name in ascending order.
- **Program Type** - Program results are sorted by the Program Type in ascending order

Creating a Program

There are two choices available to start the process of creating a Program. The **Create Program** button is available in both the Program Home window and the Program Search window.

Creating a Program - Program Search

Figure 10-6 Program Search



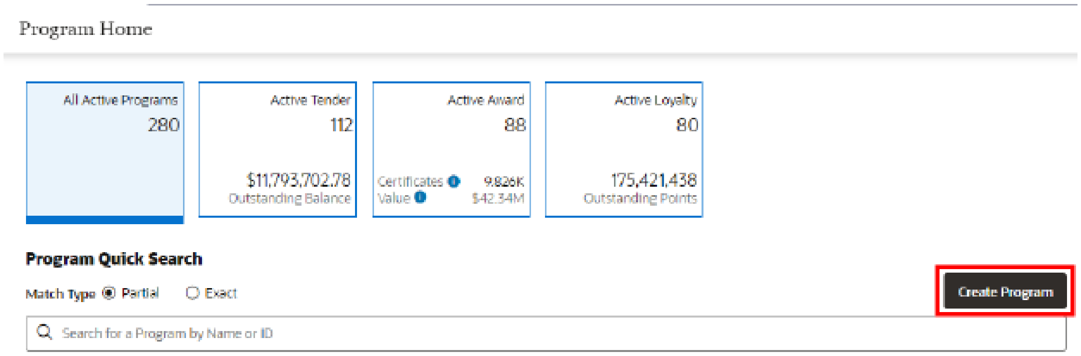
To Create a new program from the Program Search screen, click the **Create Program** button, which opens the program wizard on the Information tab. Proceed to **Step 5** in Creating a Program - Program Home.

Creating a Program - Program Home

To create a new Program or Personal List from the Program Home window do the following:

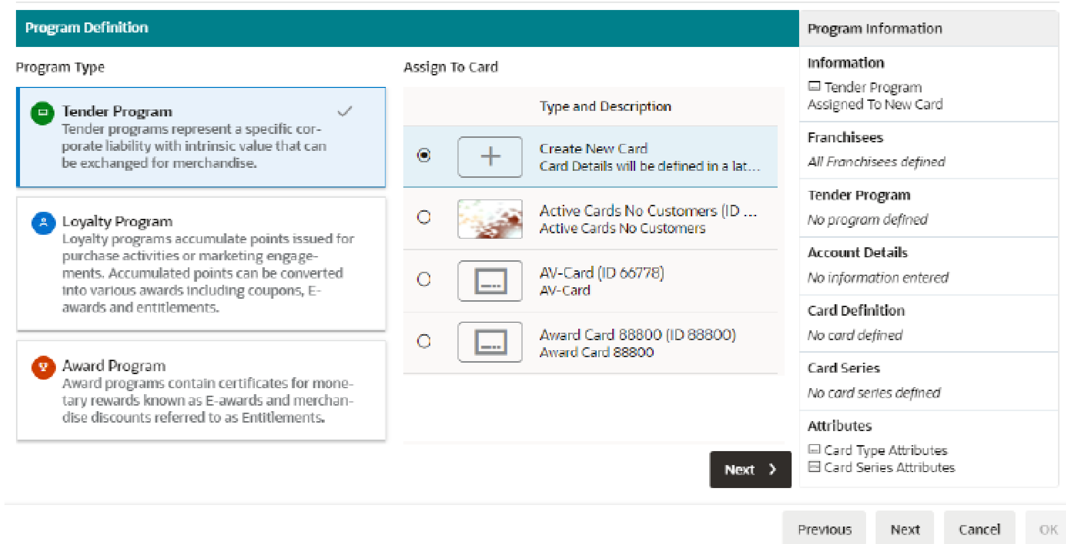
1. Click the **Tasks** icon.
2. Click **Program**.
3. Click **Program Home**. The Tile default is All Active Programs.

Figure 10-7 Program Home



4. Click **Create Program**. The Create Program wizard may contain any of the following tabs, depending on configuration and the selected Program Type.
   - Information
   - Franchisees
   - Tender Program
   - Account Details
   - Award Program
   - Award Rules (Award Program)
   - Loyalty Program
   - Levels
   - Issue Rules
   - Award Rules (Loyalty Program)
   - Movement Rules
   - Card Definition
   - Card Series
   - Attributes
   - Review
5. Enter the following items for the Information Tab:

Figure 10-8 Information Tab



> **Note:**
>
> The read-only Program Information Panel displays details throughout most of the tabs of the wizard.

- **Program Type** - Select the type of Program from the available options:
  - **Tender Program** - Tender programs represent a specific corporate liability with intrinsic value that can be exchanged for merchandise.

    > **Note:**
    >
    > When Tender Program is selected, the screen displays cards that do not already have a tender program.

  - **Loyalty Program** - Loyalty programs accumulate points issued for purchase activities or marketing engagements. Accumulated points can be converted into various awards including coupons, E-awards and Award Certificates.
  - **Award Program** - Award programs contain certificates for monetary rewards known as E-awards and merchandise discounts referred to as Award Certificates.
- **Assign To Card**
  - **Create New Card** - Card Details will be defined in a later step. Proceed to **Step 6** for next steps.
  - **Existing Card** - Proceed to Step 6 for next steps.

6. Proceed to the step based on the type of program and card configuration chosen in the previous step.
   - If the Program Type is **Tender**, and you are creating a **new** card, click **Next** to proceed to **Step 7** the **Franchisees** tab.

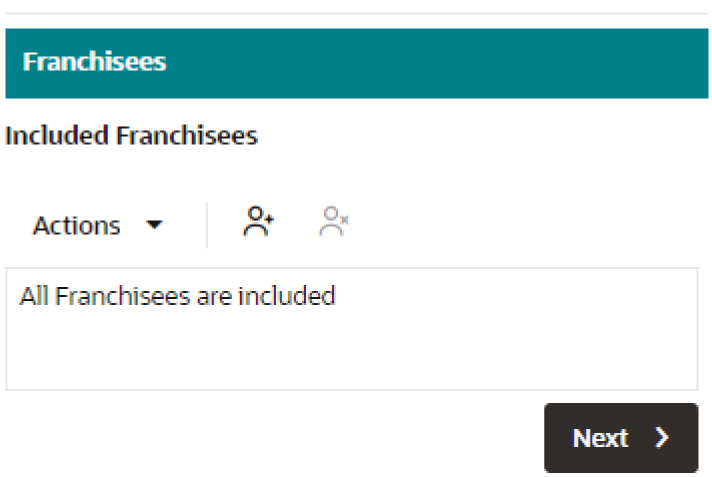
- If the Program Type is **Tender**, and you are assigning an **existing** card, proceed to Step 10 the **Tender Program** tab.
- If the Program Type is **Loyalty**, and you are creating a **new** card, click **Next** to proceed to **Step 7** the **Franchisees** tab.
- If the Program Type is **Loyalty**, and you are assigning an **existing** card, proceed to **Step 13** the Loyalty Program.
- If the Program Type is **Award**, and you are creating a **new** card, click **Next** to proceed to **Step 7** the **Franchisees** tab.
- If the Program Type is **Award**, and you are assigning an **existing** card, proceed to **Step 15** the Award Program tab.

7. The **Franchisees** tab allows you to add or change the Franchisees you wish to assign to the program.

> **Note:**
>
> The Franchisee tab is only visible if the `EnableFranchiseSupport` configuration is enabled, and Franchisees are defined. If you are assigned specific franchisees, then only those franchisees you are associated with are shown.

- If Franchisees are enabled in Customer Engagement, the Franchisees Tab appears. Proceed to **Step 8**.
- If Franchisees are not enabled in Customer Engagement and the Program Type is **Tender**, the Tender Program tab appears. Proceed to **Step 10**.
- If Franchisees are not enabled in Customer Engagement and the Program Type is **Loyalty**, the Loyalty Program tab appears. Proceed to **Step 13**.
- If Franchisees are not enabled in Customer Engagement and the Program Type is **Award**, the Award Program tab appears. Proceed to **Step 15**.

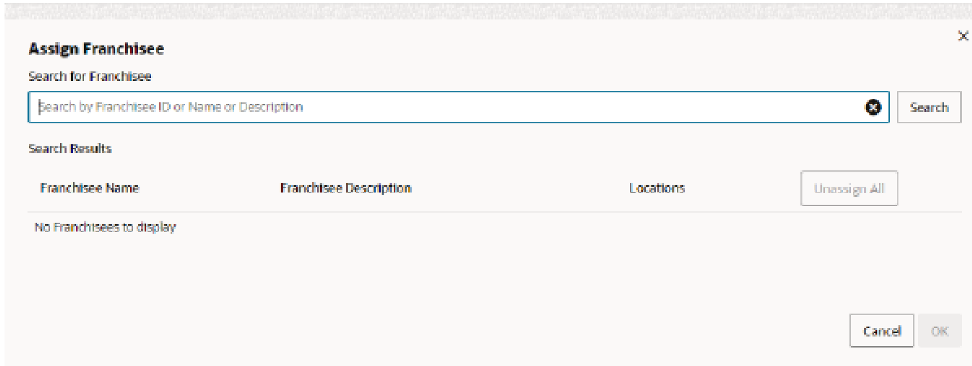
Figure 10-9 Franchisee Tab



8. To assign a Franchisee:
   - Assigning a Franchisee

- Either click the **Action Menu** and then click **Assign**; or click **Add (+)**. This opens the Assign Franchisee window.

Figure 10-10 Assign Franchisee



- By default, all franchisees are assigned to the program. To make changes to those assignments, you can search for specific franchisees by entering all or part the franchisee **Name**, **ID**, or **Description**. Click **Search** in the Search for Franchisee search box.

> **Note:**
>
> You also have the option to enter no search criteria and click **Search** to retrieve all available franchisees from which to select for assignment.

- In the Included Franchisees results list, click **Assign All** to assign all the search results, or click **Assign** for a specific franchisee to add to the program.
- Click **OK** to accept the changes or **Cancel** to close the window without saving.

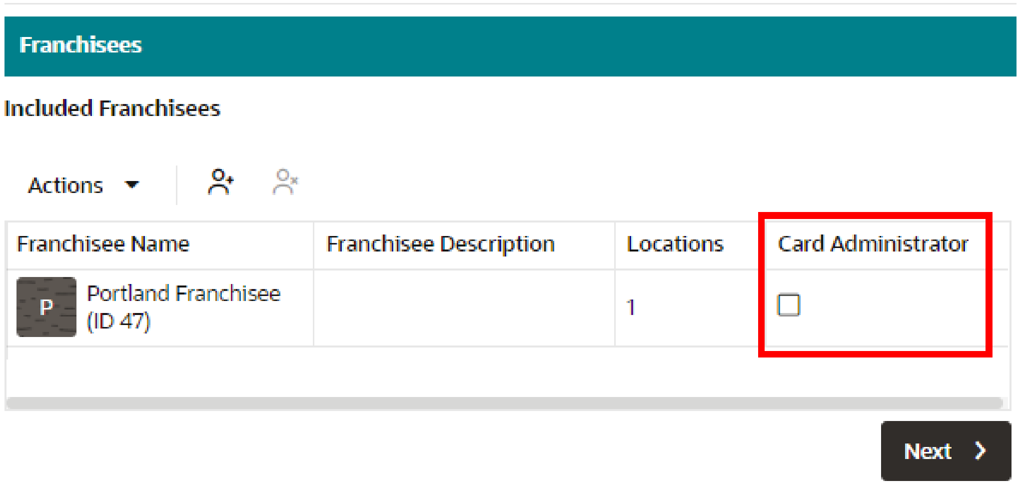
> **Note:**
>
> A confirmation notification appears to confirm the Franchisees has been assigned.
>
> After a Franchisee is assigned, it appears at the top of the list. The rest of the Franchisees are ordered by ID.

Figure 10-11 Confirmation Notification

Card Administration Field

This field (unique to Programs) determines whether the franchisee will have Card Administrator privileges for the Card Definition. Select the **Card Administration** check box to enable Card Administrator privileges.

Figure 10-12 Card Administration Field



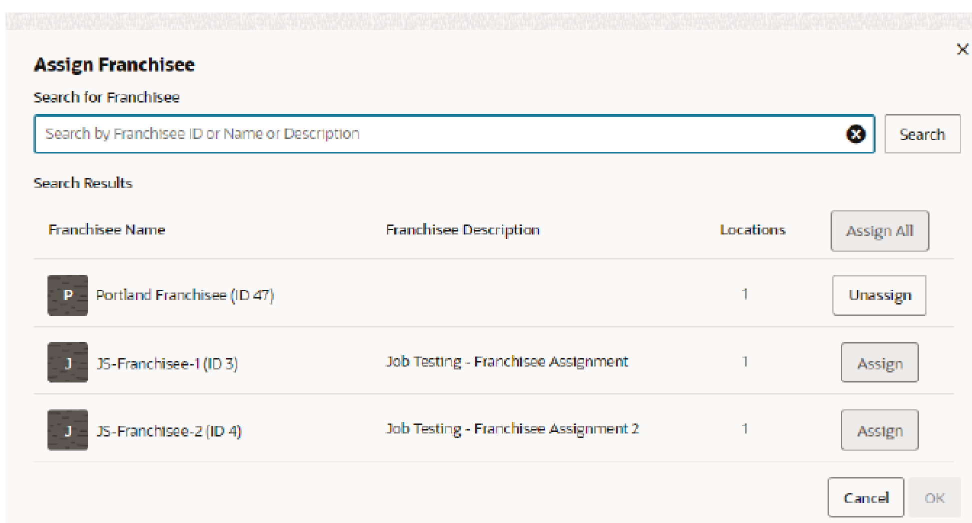
- Unassigning a Franchisee

  There are two ways to unassign any of the assigned franchisees on the program.

  – In the Assign Franchisee window, click **Unassign** on any Franchisees currently assigned to the program. Click **OK** to accept the changes or **Cancel** to close the window without saving.

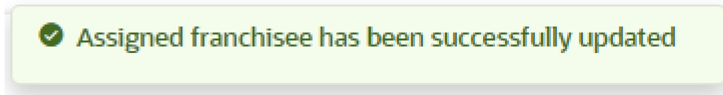
  – To unassign Franchisees listed in the Included Franchisees table on the Franchisees tab, first highlight the row and then select the Action Menu. Either click Unassign or click X to remove the associated Franchisee.

Figure 10-13 Assign Franchisee (Using the Unassign Button)



> **Note:**
>
> A confirmation notification appears to confirm that the Franchisees are deleted.

Figure 10-14 Confirmation Notification



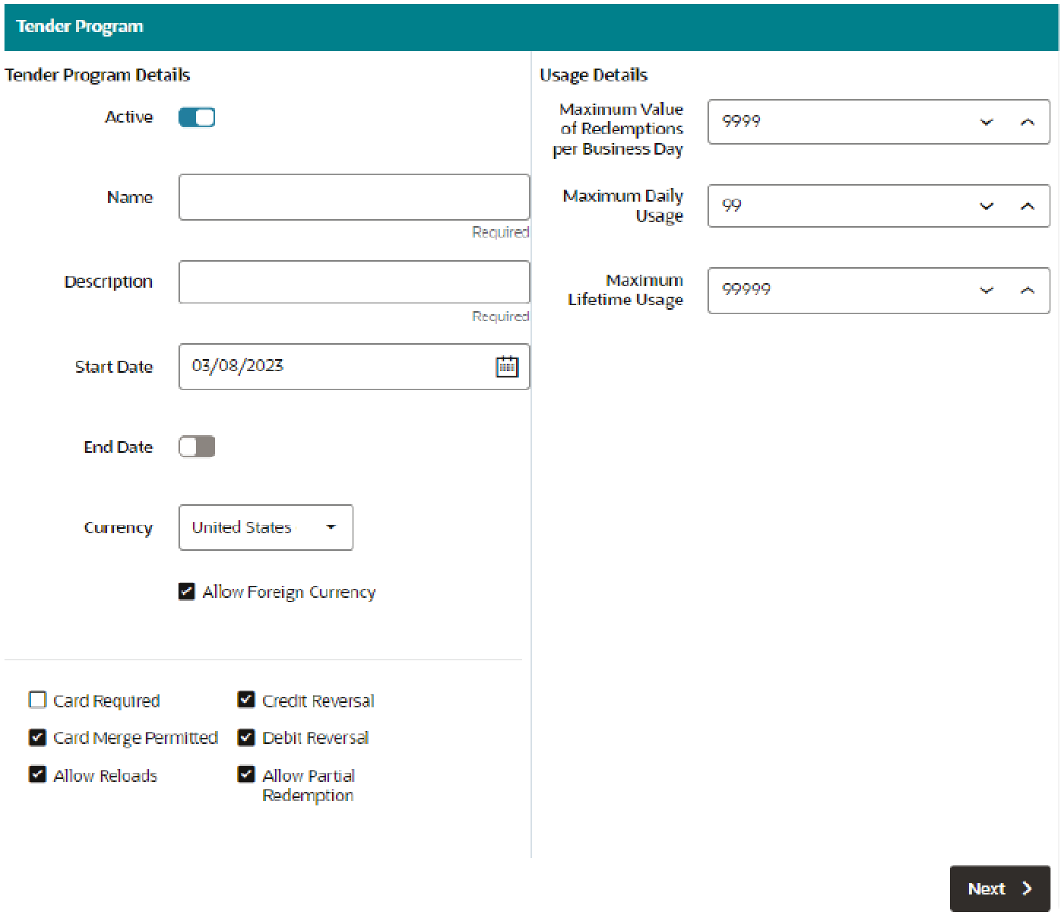
9. When finished selecting the franchises on the Franchisee tab, click **Next** to continue to the next tab.

   > **Note:**
   >
   > Before you save the Program, you can use the **tab links** along with **Previous** and **Next** to go back to any point in the create program process and make changes.

   a. If the Program Type is **Tender**, proceed to **Step 10**, the **Tender Program** tab.
   b. If the Program Type is **Loyalty**, proceed to **Step 13**, the **Loyalty Program** tab.
   c. If the Program Type is **Award**, proceed to **Step 15**, the **Award Program** tab.

10. Enter the following information for the **Tender Program** tab:

Figure 10-15 Tender Program Tab



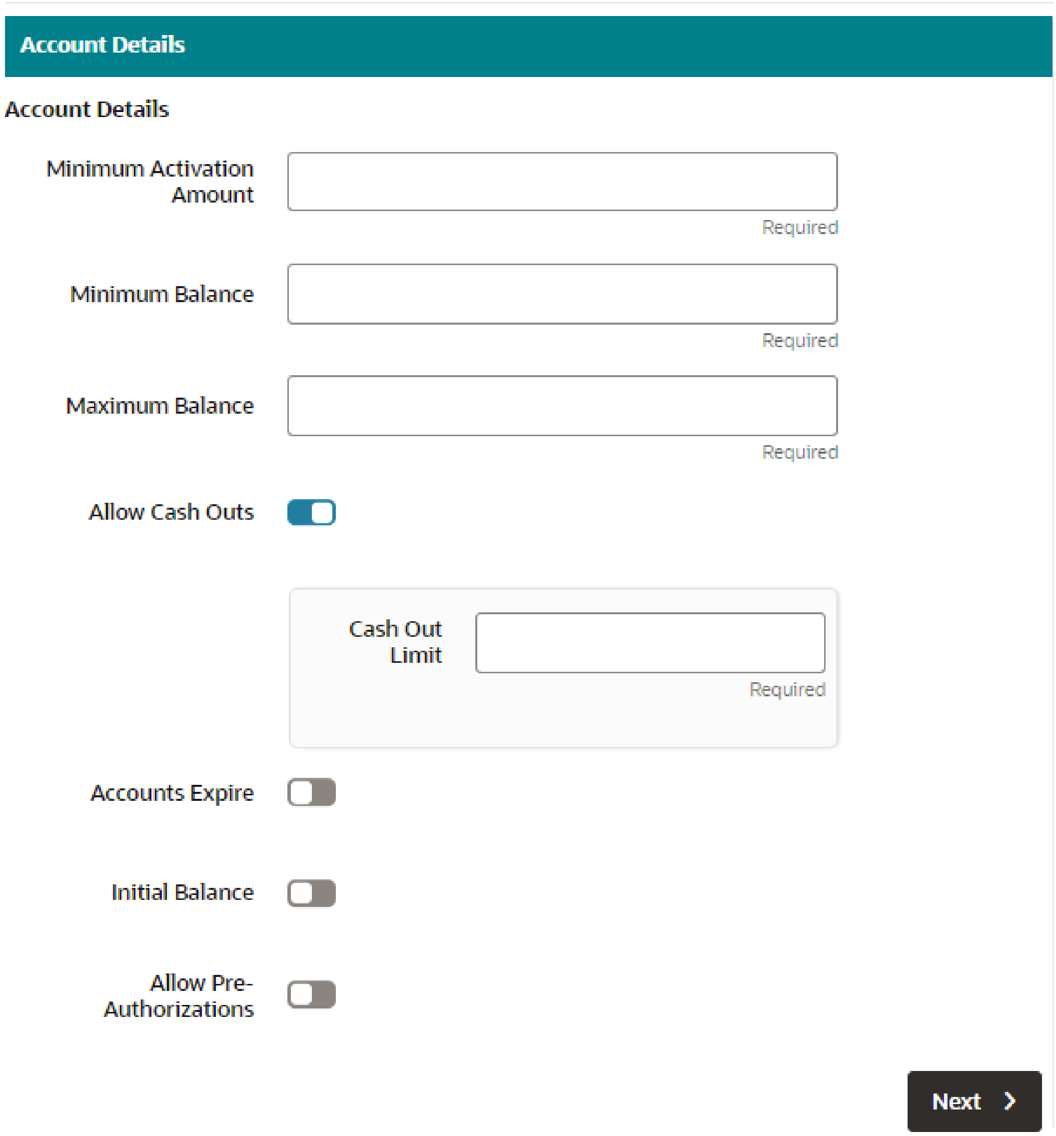
- **Tender Program Details**
  - **Active -** Toggle on to activate the program immediately on the Start Date.
  - **Name -** Name of the Program.
  - **Description -** Description of the Program.
  - **Start Date -** Date on which the Program starts.
  - **End Date -** Toggle on to activate the Ends On date selector.
  - **Ends On** (displays when the End Date toggle is on) - Date on which the Program ends.
  - **Currency -** The base currency for the Program.
  - **Allow Foreign Currency -** Indicates whether foreign currency transactions (that is, a transaction performed in a currency other than the base currency) are applied to the Program.
  - **Card Required -** Indicates whether the customer must have the physical card present during the transaction to receive credit for the transaction.
  - **Card Merge Permitted -** Indicates whether the Card can be merged with another Card.
  - **Allow Reloads -** Indicates whether the Program allows accounts to be reloaded.

- **Credit Reversal** - Indicate whether credit reversals can be performed.
- **Debit Reversal** - Indicate whether debit reversals can be performed.
- **Allow Partial Redemption** - Indicates whether a balance on a Tender Account can be partially redeemed.

* Usage Details
  - **Maximum Value of Redemptions per Business Day** - The total amount of all redemptions that can be performed on a Tender Account in one day.
  - **Maximum Daily Usage** - The total number of times that a Tender Account can be used in one day.
  - **Maximum Lifetime Usage** - The total number of times that a Tender Account can be used over the lifetime of the account.

11. When finished entering the information on the **Tender Program** tab, click **Next**, then proceed to the **Account Details** tab.
12. Enter the following for the **Account Details** tab.

Figure 10-16 Tender Program - Account Details

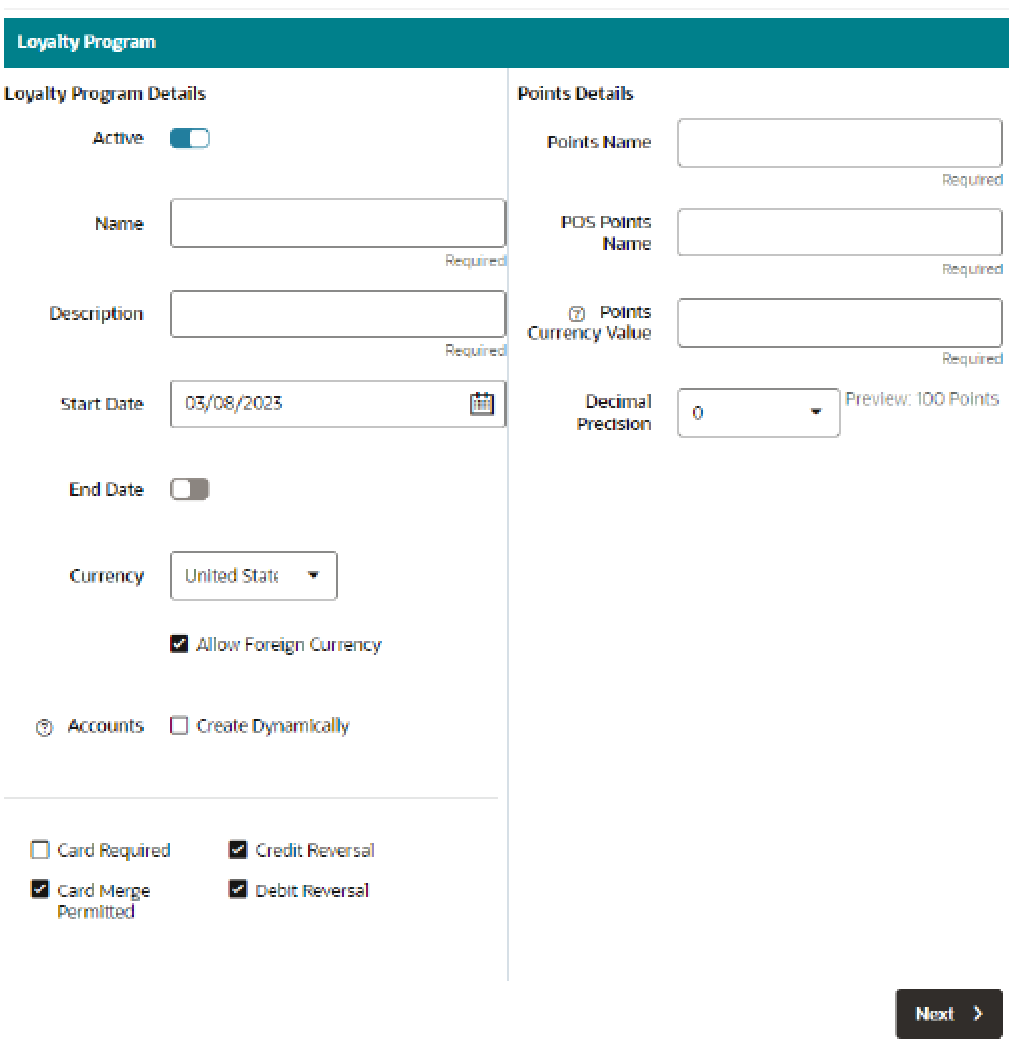


- **Minimum Activation Amount** - The minimum amount that can be in an Account for it to be activated.
- **Minimum Balance -** The minimum amount that must be kept in an Account.
- **Maximum Balance -** The maximum amount that can be put into the Account
- **Allow Cash Outs** -Toggle to on to indicate whether the account can be redeemed for cash or an equivalent tender.
  - **Cash Out Limit** - If cash out transactions are allowed, the maximum amount that can be cashed out in a transaction.
- **Accounts Expire -** Toggle to on to indicate the account expires after a certain period of time.
  - **Expire After -** Enter the number of periods (from Period Type) that passes before a Tender Account expires.

  - **Period Type** - Indicates the type of period used for the Expire After field.
- **Initial Balance** - Toggle to on to indicate there is an initial balance on each account. Enter the following:
  - **Initial Balance Amount -** The amount of the initial balance.
  - **Initial Book Value -** The initial book value of the account.
- **Allow Pre-Authorizations** - Toggle to on to indicate that pre-authorizations are allowed for the Tender Accounts.
  - **Pre-Authorizations Expire** - Toggle to on to indicate that the pre-authorizations expire.
  - **Expire After** - Enter the number of periods (from Period Type) that will pass before a Tender Account expires.
  - **Period Type** - Indicates the type of period used for the **Expire After** field.

13. Enter the following for the **Loyalty Program** tab.

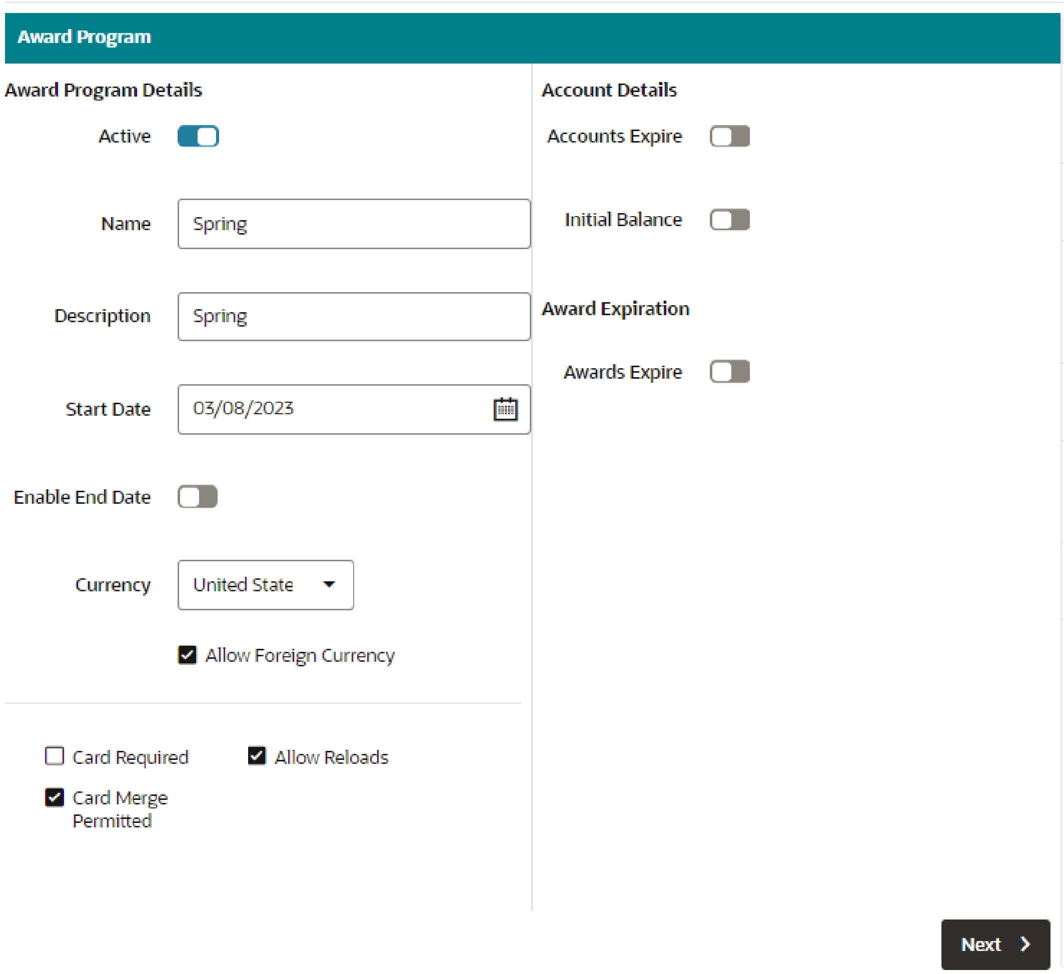
Figure 10-17   Loyalty Program Tab



- **Loyalty Program Details**
  - **Active** - Toggle on to activate the program immediately on the Start Date.
  - **Name** - Name of the Program.
  - **Description** - Description of the Program.
  - **Start Date** - Date on which the Program starts.
  - **End Date** - Toggle on to activate the Ends On date selector.
  - **Ends On** (displays when the End Date toggle is on) - Date on which the Program ends.
  - **Currency** - The base currency for the Program.
  - **Accounts** - If the check box is selected, then, a loyalty account for a card is not created until there is a POS transaction added to the card. If the check box is clear, then, the loyalty account is created when the card is generated.
  - **Allow Foreign Currency** - Indicates whether or not foreign currency transactions (that is, a transaction performed in a currency other than the base currency) are applied to the Program.
  - **Card Required** - Indicates whether or not the customer must have the physical card present during the transaction to receive credit for the transaction.
  - **Card Merge Permitted** - Indicates whether or not the Card can be merged with another Card.
  - **Credit Reversal** - Indicate whether or not credit reversals can be performed.
  - **Debit Reversal** - Indicate whether or not debit reversals can be performed.
- **Points Details**
  - **Points Name** - Name of the points used by the Program.
  - **POS Points Name** - Name of the points displayed on the point of sale system.
  - **Points Currency Value** - Informational and reporting use only.
  - **Points Decimal Precision** - The number of decimal points used in tracking points.

14. When finished entering the information on the **Loyalty Program** tab, click **Next**, then proceed to **Step 20**, the **Levels** tab.
15. Enter the following for the **Award Program** tab.

Figure 10-18 Award Program Tab



Award Program Details

- **Active -** Toggle on to activate the program immediately on the Start Date.
- **Name -** Name of the Program.
- **Description -** Description of the Program.
- **Start Date -** Date on which the Program starts.
- **Enable End Date -** Toggle on to activate the Ends On date selector.
- **End Date** (displays when the Enable End Date toggle is on) **-** Date on which the Program ends.
- **Currency -** The base currency for the Program.
- **Allow Foreign Currency -** Indicates whether or not foreign currency transactions (that is, a transaction performed in a currency other than the base currency) are applied to the Program.
- **Card Required -** Indicates whether the customer must have the physical card present during the transaction to receive credit for the transaction.
- **Card Merge Permitted -** Indicates whether or not the Card can be merged with another Card.

- **Allow Reloads** - Indicates whether or not the Program allows accounts to be reloaded.

> **Note:**
>
> The account balance for an award account holds the value of any e-awards added to an award program. If the Allow Reloads is not checked, once the initial value is used up, the program cannot add more value to the account balance. If it is checked, E Award values can continue to be added. E Awards are created and issued from loyalty programs but the value is held in a linked award program.

Account Details

- **Accounts Expire** - Toggle on to enter the preferred time period for the account to expire.
- **Initial Balance** - This initial balance will hold a currency value that will be added automatically to an award account when it is activated on an individual card. This currency value can be used in the retail location toward a purchase.

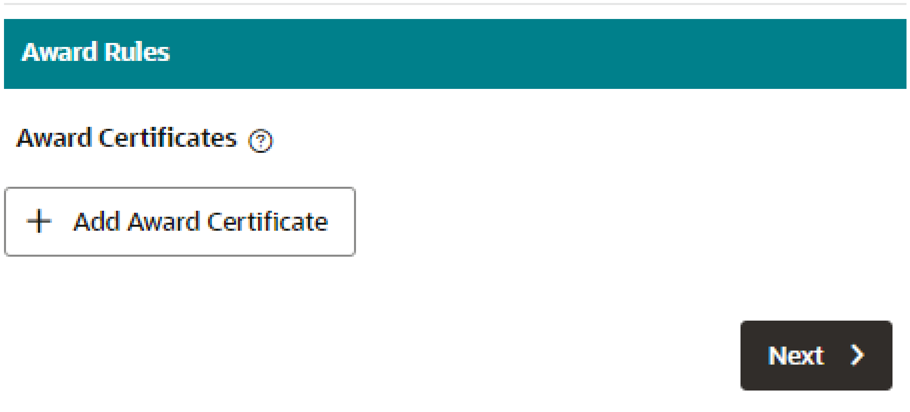
Award Expiration

- **Award Expire** - Toggle on to enter the preferred time and period for the award to expire.
- **Extend Expiration based on Activity** (appears only when Awards Expire is toggled to on) - If the check box is clear, then the expiration date is fixed and determined by the date the coupon is issued. If the check box is selected, the expiration date is initially determined by the date the coupon is issued, but is then recalculated based on the current activity date as a courtesy to the customer when they are shopping with your company.

> **Note:**
>
> Before you save the Program, you can use the **tab links** along with **Previous** and **Next** to go back to any point in the create program process and make changes.

16. When finished configuring the **Award Program**, Click **Next**. Proceed to **Award Rules** tab.
17. Enter the following for the **Award Rules** tab:

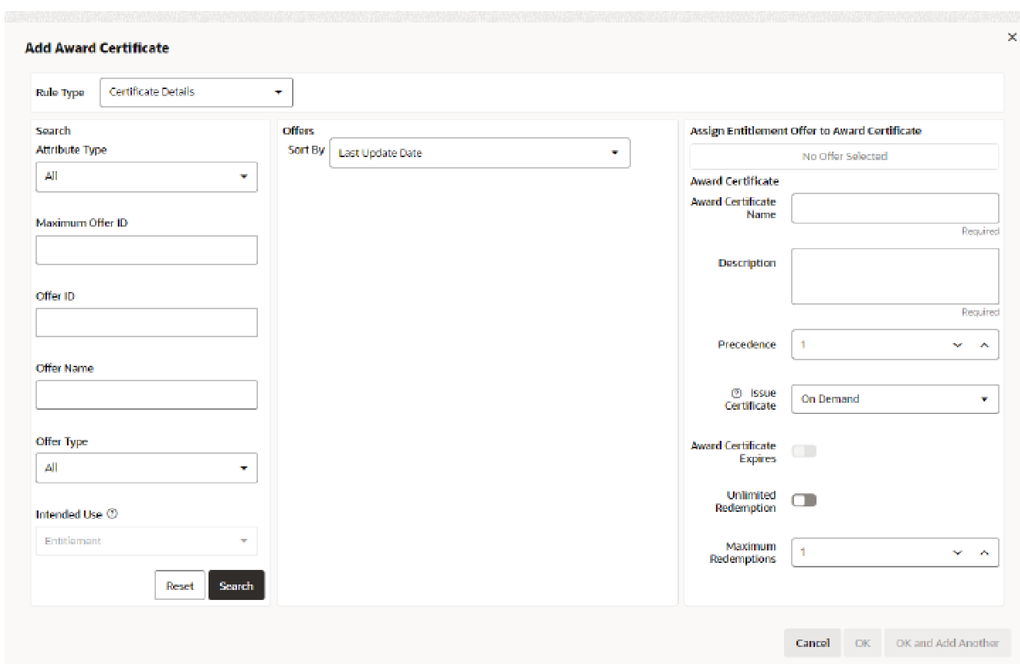
Figure 10-19 Award Rules Tab



> **Note:**
>
> The Award Rules tab in the Award Program allows the user to create an award certificate and assign time and or location rules to limit when and or where they can be redeemed.

- Click the **+ Add Award Certificate** button.

Figure 10-20 Add Award Certificate



The Award Rules tab for the Award Program defaults the to Rule Type, Certificate Details. After the Offer is added to the Assign Entitlement Offer to Award Certificate, you are able to add additional Rule Types to this Award Certificate.

There are four sections; Search, Offers, Assign Entitlement Offer to Award Certificate, and Award Certificate.

- **Search -** Use this section to populate the Offers Section. Fields include:
  - Attribute Type
  - Maximum Offer ID
  - Offer ID
  - Offer Name
  - Offer Type
  - Intended Use

  > **Note:**
  >
  > The Intended Use field is disabled and uses the default value of Entitlement. Only offers with an Intended Use of Entitlement can be assigned to an award certificate.

- Click **Search** to populate the Offers Section. Click **Reset** to clear all Search fields.
- **Sort By -** Select an option to sort by the following:
  - Last Update Date
  - Offer ID
  - Offer Name
  - Offer Type
- Click **Add** to populate the Assign Entitlement Offer to Award Certificate section.

Assign Entitlement Offer to Award Certificate

- Click **Remove** to remove an offer. Return to the Offers section to select a new offer to assign.

Award Certificate

- Enter the **Award Certificate Name**.
- Enter the **Description**.
- Enter the **Precedence** (Order in which the Award Rule will be applied if more than one Award Rule is effective).
- Select **Issue Certificate** setting.
  - On Demand
  - When Account is First Activated
  - When Card is Registered to Customer

> **Note:**
>
> When the On Demand option is selected, the award certificate can be issued manually, by a web service or by a loyalty issue rule using the Create Loyalty Award batch.

- **Award Certificate Expires** - This is a toggle switch, but it is read only. It is on or off based on the Issue Certificate setting. When Issue Certificate = On Demand, this toggle is **Off**. The expiration date is controlled by the web service or loyalty issue rule. When Issue Certificate is NOT On Demand, then the toggle is **On** (read only) and the user is required to select expiration parameters.
- To allow unlimited redemptions, toggle on **Unlimited Redemption**.
- When the Unlimited Redemption toggle is off, enter the number of **Maximum Redemptions** allowed.

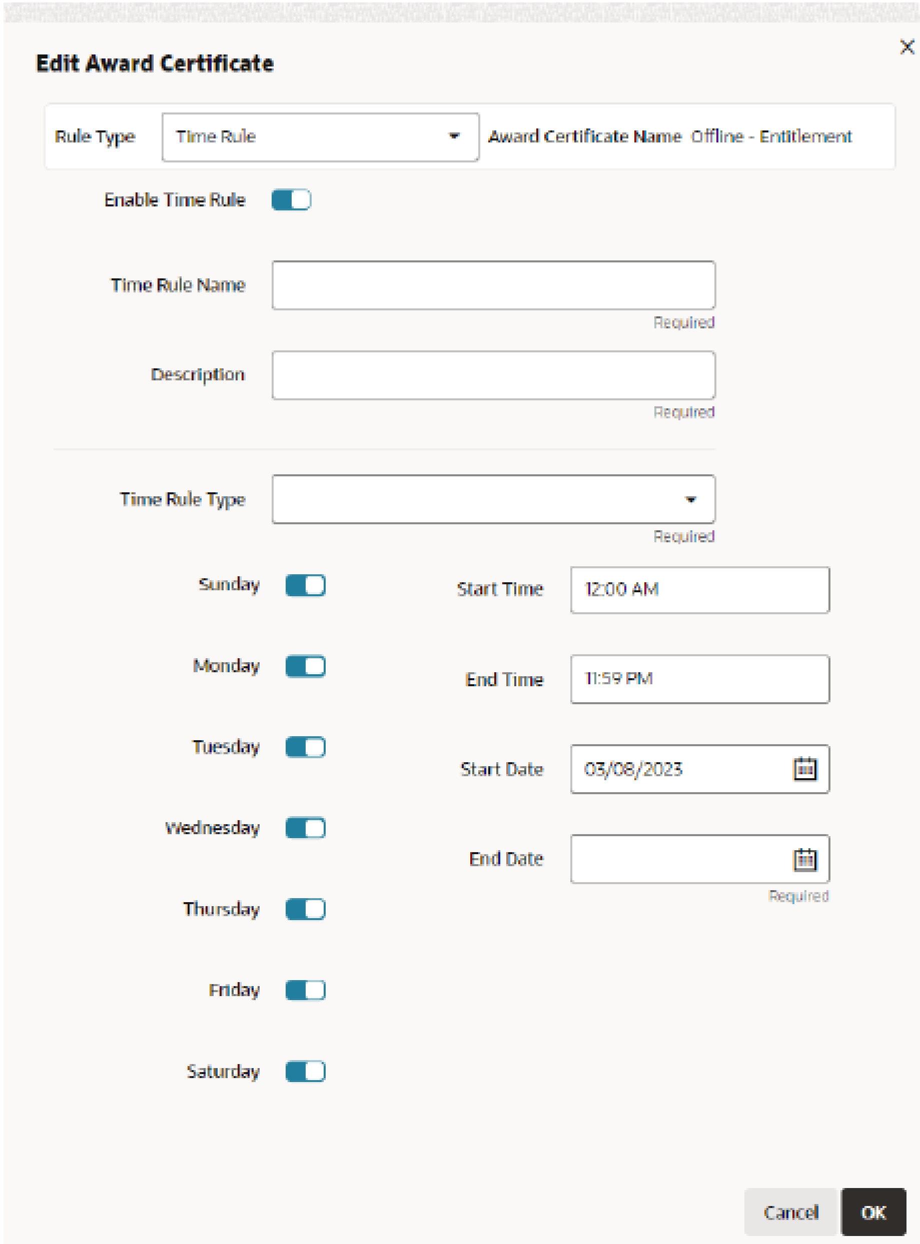
Rule Types - These are the eligibility rules that will be used to determine when the award certificate is effective.

> **Note:**
>
> The next section deals with the Rule Types available for the Award Certificate once an Entitlement Offer is assigned. Any of the Rule Types can be combined with other Rule Types.

Time Rule - Defines the time rules when the award certificate is effective.

- **Enable Time Rule** - Toggle on to activate the Time Rule Name, Description, and Time Rule Type fields, and the purpose is to define when the award certificate is effective. If it is turned off, the award certificate has no restrictions as to when it is effective.
- **Time Rule Name** - Name of the Time Rule.
- **Description** - Description of the Time Rule.
- **Time Rule Type** - Types include:
  - Eligibility Period
  - Blackout Period

Figure 10-21   Time Rule - Eligibility Period / Blackout Period

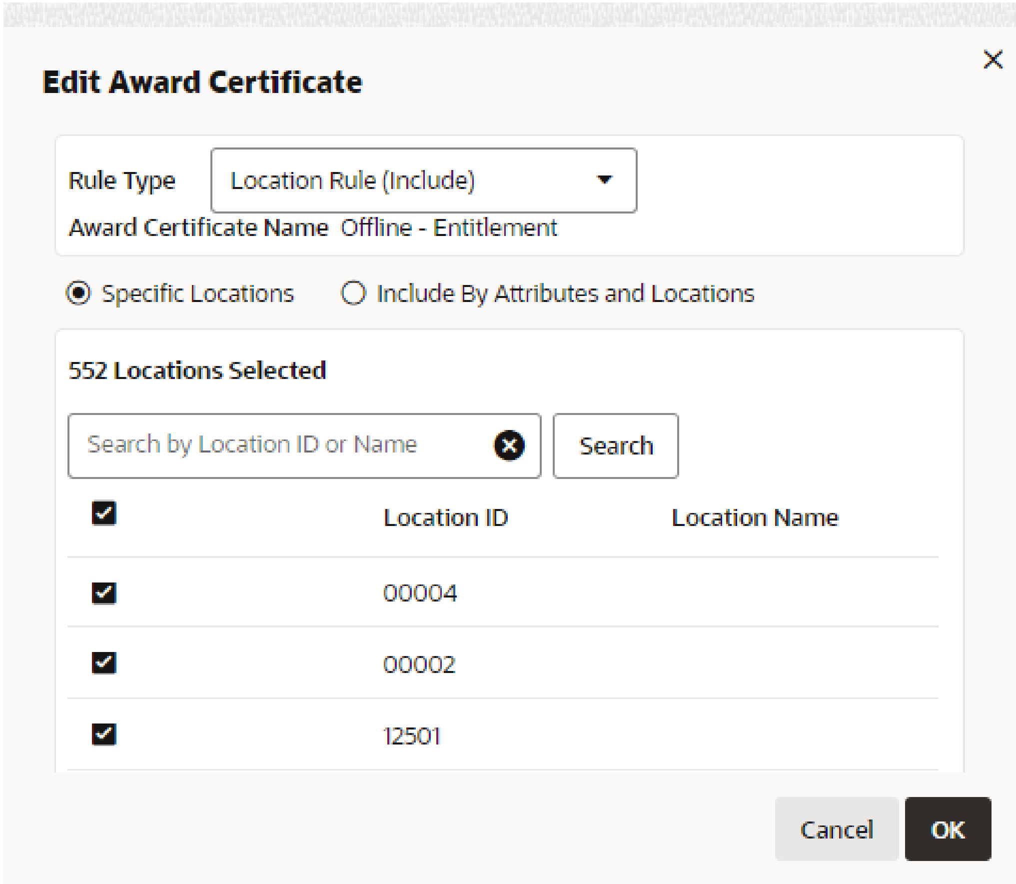


- Toggle on to select each day of the week for which the time rules apply for this Item Rule.
- Enter a **Start Time**.
- Enter an **End Time**.
- Enter a **Start Date**.
- Enter an **End Date**.

Location Rule (Include) or Location Rule (Exclude)

Defines which locations the award certificate is effective in, or which locations are excluded. Both Rule Types are configured in the same way.

Figure 10-22 Location Rule (Include)



- To add an Award certificate by Specific Locations:

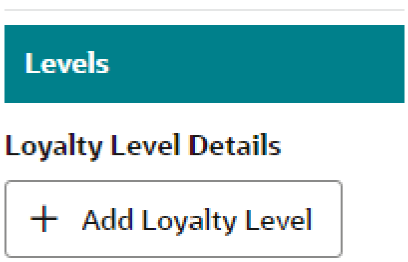
> **Note:**
>
> The Location ID check box at the top of the list enables you to clear or select all locations. If you clear all the locations, then you can scroll through the list or search for a specific location.

  - Enter part or all of a **Location ID** or **Name**.
  - Click **Search**.
  - Select the check box for **each** of the desired **Locations**.
- To add an Award certificate using Include By Attributes and Locations or Exclude By Attributes and Locations
  - Click **Add** to select an attribute. The By Attributes and By Location options can be collapsed or expanded.
  - After the initial selection, additional choices display in the query with the condition, **Or** (one or more of the conditions must be met). Click **Or** to change to **And** (both conditions must be met).
  - Click the **Vertical Ellipsis** and select **Remove** to clear the attribute from the query.

- Click **OK** to add the Award Certificate to the Program or click **OK and Add Another** to add another Award Certificate. Click **Cancel** to close the window without adding the Award Certificate.

18. When finished entering all the Award Rules to the Award Certificates, in the Award Rules tab, click **Next**.
    - **Create New Card** - Proceed to **Step 29**, the **Card Definition** tab.
    - **Existing Card** - Proceed to **Step 44**, the **Review** tab.
19. When finished defining **Account Details** do the following:
    - If you are creating a **new** card, click **Next** to proceed to **Step 29** the **Card Definition** tab.
    - If you are assigning an **existing** card, click **Next** to proceed to **Step 36**, the **Review** tab for the **Tender Program**.
20. The **Levels** tab displays information for each Level in the **Loyalty Program**. Enter the following information to add Loyalty Levels.

Figure 10-23 Levels Tab

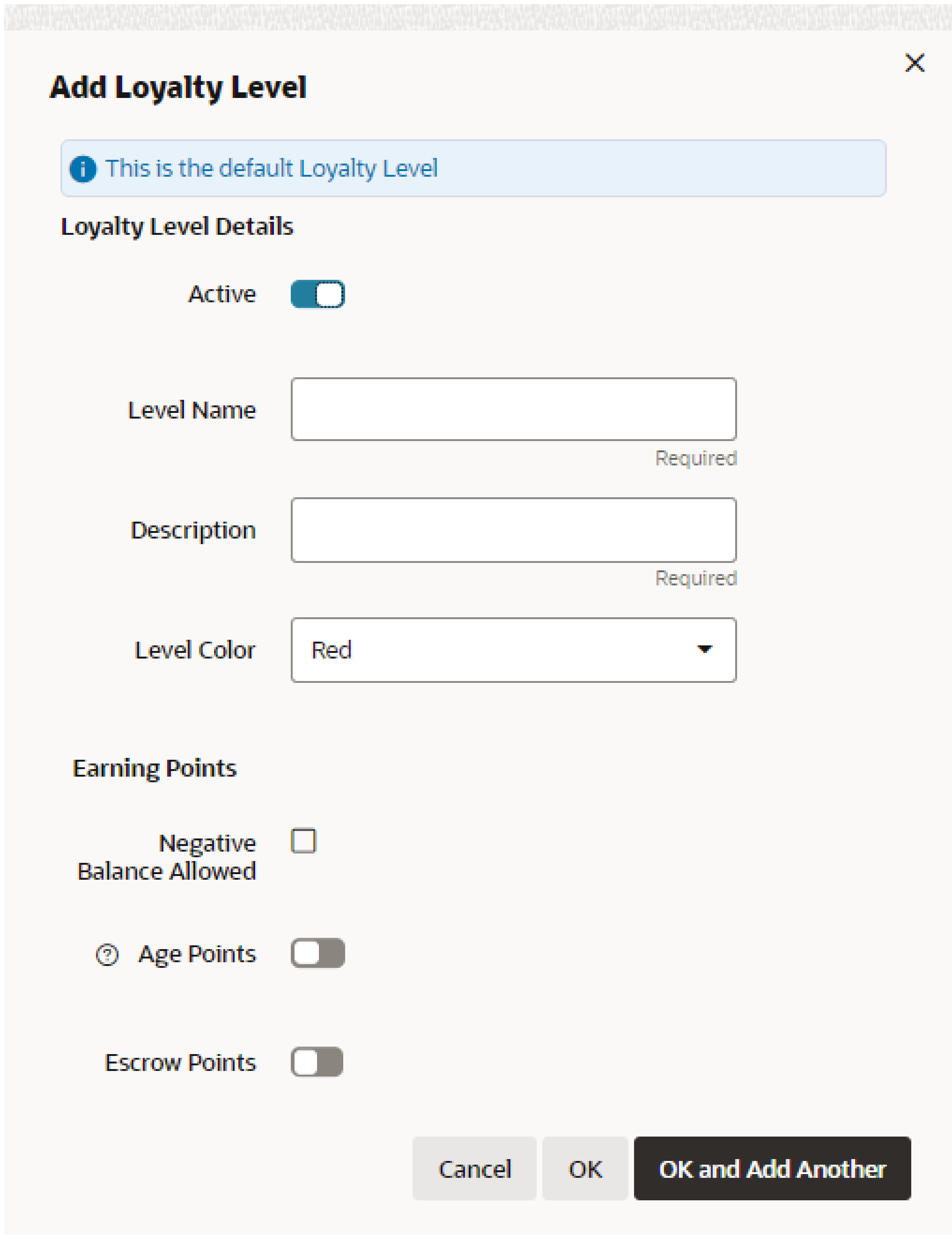


Adding Initial Loyalty Level

- Click **+ Add Loyalty Level**.

  Loyalty Level Details

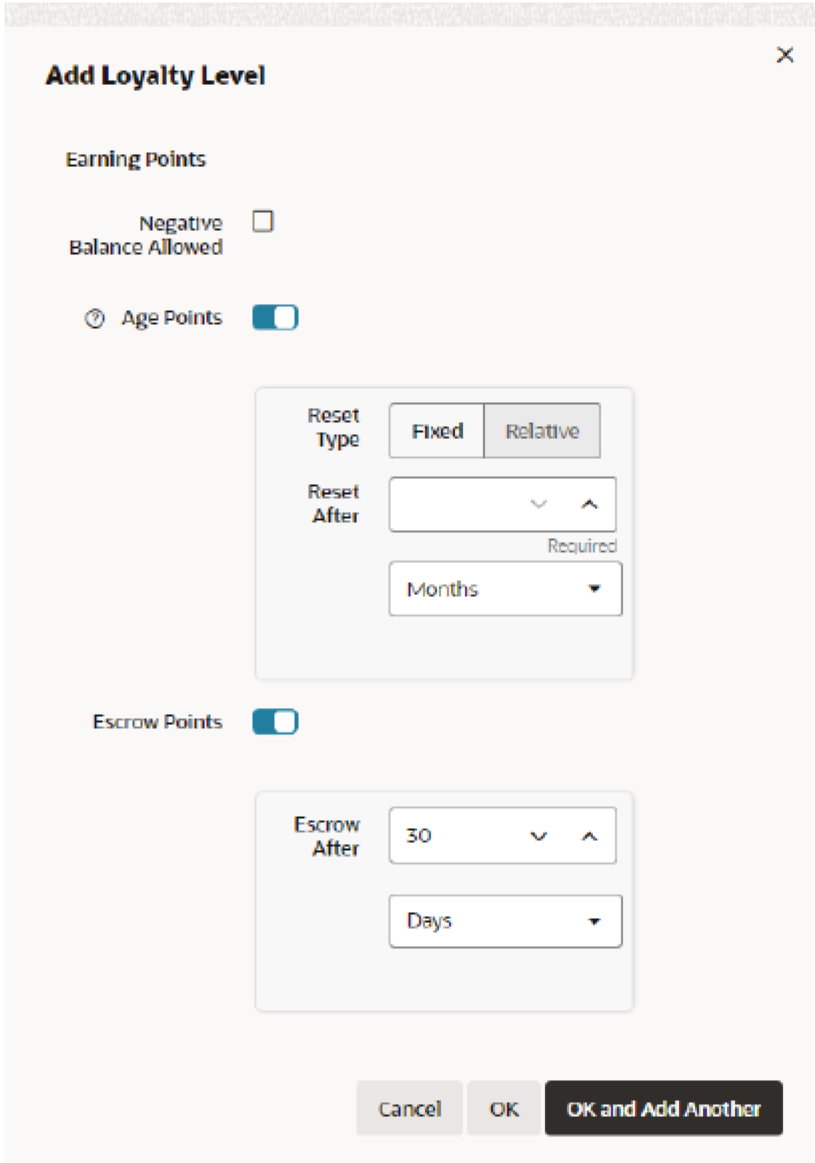
Figure 10-24 Loyalty Level Details



- The Active toggle default is on. Click the toggle off to inactivate the Loyalty Level.
- Enter a **Level Name**.
- Enter a **Description**.
- Select a **Level Color**.

Earning Points

Figure 10-25 Earning Points



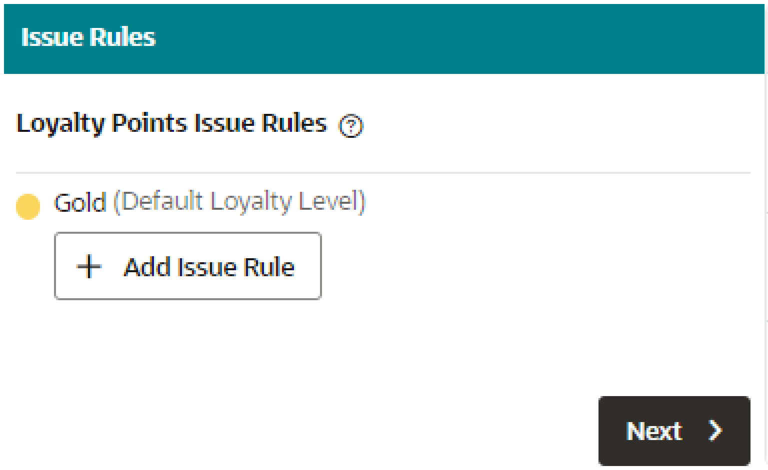
- Select the **Negative Balance Allowed** check box to indicate when the Loyalty Level allows customers to have negative point balances.
- **Age Points** (toggle on to activate) - Selecting the **Fixed** reset type expires the entire unused points balance after the account has been inactive for x periods. Selecting the **Relative** reset type expires the individual unused points x periods after each has been earned. Enter the **Reset After** number of periods then select the type of period.
- **Escrow Points** (toggle on to activate) **-** Determines whether points are escrowed before they become available for use as Earned Points. Enter the **Escrow After** number of periods then select the type of period.
- Click **OK** to add the Level to the Program or click **OK and Add Another** to add another Level. Click **Cancel** to close the window without adding the Level.

Edit/Deactivate Loyalty Levels

- Click the **Additional Options** ellipsis to **Deactivate** or **Edit** a Loyalty Level.

21. When finished entering all Loyalty Levels on the **Levels** tab, click **Next** to proceed to the **Issue Rules** tab.
22. The **Issue Rules** tab contains a Layer List of rules that determine how points are issued by the Loyalty Level. The default Rule Type is Definition.

Figure 10-26 Issue Rules Tab



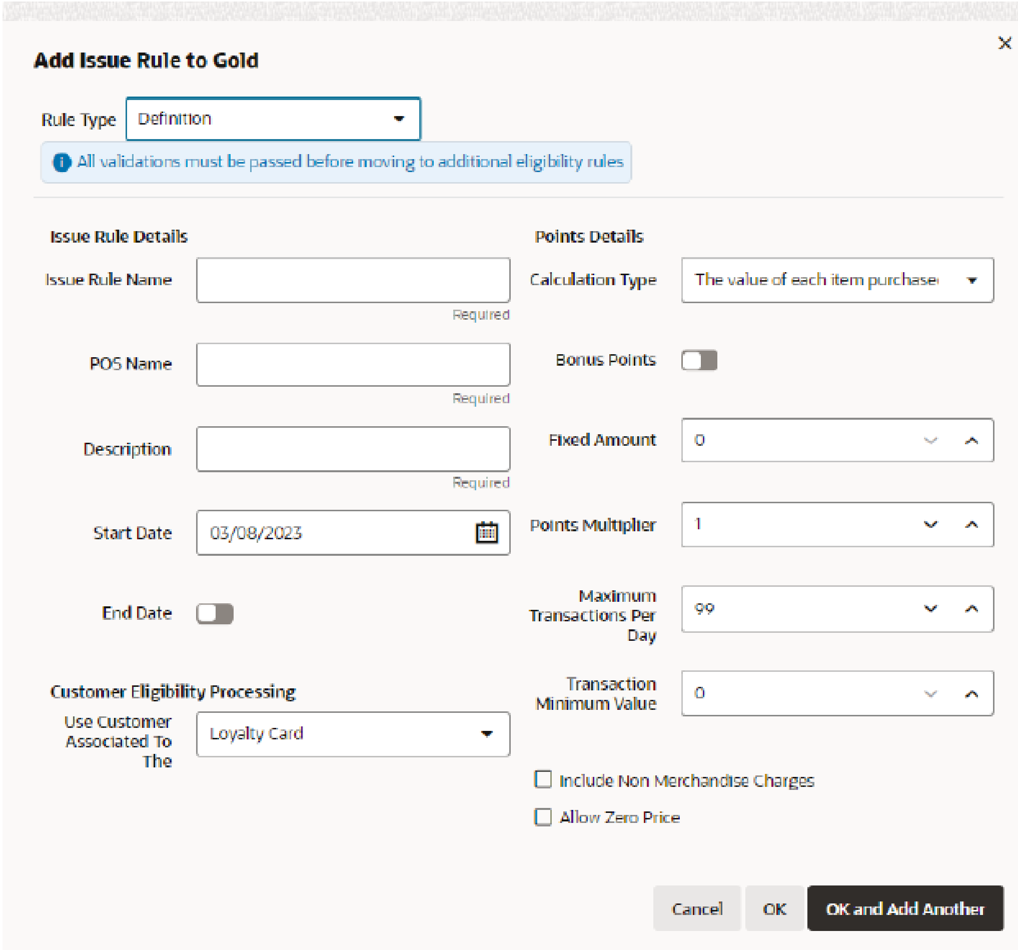
Adding an Issue Rule

- Click **+ Add Issue Rule**.

> **Note:**
>
> Issue Rules are required to use the Definition Rule Type. Once the Definition rule type has been completed and validated, you can add additional Rule Types before you click OK to save the Issue Rule. Availability of the Rule Types are determined based on the selected Calculation Type.

Issue Rule Details

Figure 10-27 Add Issue Rule to Entry



- Use the required default **Definition** Rule Type.
- Enter the **Issue Rule Name**.
- Enter the **POS Name**.
- Enter the **Description**.
- Click the **Date Selector** icon to choose a **Start Date** or enter the **date** in the Start Date text box.
- If desired, toggle off **End Date** to display the **Ends On** text box. Click the **Date Selector** icon to choose a **Ends On** date or enter the ends on date in the **Ends On** date text box.

Customer Eligibility Processing

- Select the **Use Customer Associated To The** Loyalty Card or Transaction.

> **Note:**
>
> When Loyalty Card is selected, the customer associated to the card is used to evaluate audience rule eligibility. When Transaction is selected, the customer associated to the transaction is used.

Points Details

- **Calculation Type** - Indicates the value that is used as the point-determination method.
  - **The value of each item purchased** - The sale amount of each item purchased in the transaction.
  - **The quantity of each item purchased** - The quantity of each item purchased in the transaction.
  - **The number of marketing engagements** - The number of times the customer interacts with marketing media, such as watching a video online.
  - **The number of qualifying transactions** - The number of qualifying transactions made by the Customer.
  - **The number of qualifying visits** - The number of qualifying visits made by the Customer
- **Bonus Points** - Indicates whether this Issue Rule stipulates that the Loyalty Program issues points as Bonus Points (defaults to ON if the Calculation Type is The number of marketing engagements) or Regular Points.
- **Fixed Amount** - The Fixed Amount, if any, assigned to each transaction or marketing engagement.
- **Points Multiplier** - The number multiplied by the value indicated in the Calculation Type field (only shown if the selected Calculation Type is either The value of each item purchased or The quantity of each item purchased).
- **Maximum Transactions Per Day** - The maximum number of sales transactions in a single day that will be used to calculate Loyalty points.
- **Transaction Minimum Value** - Minimum amount of a transaction for it to be applied to a Loyalty account.
- **Include Non-Merchandise Charges** - Determines whether points will be issued for non-merchandise charges in a transaction.
- **Allow Zero Price** - Determines whether points will be issued for zero priced items in a transaction.

Issuance Rules - Displays when the Calculation Type is, The number of marketing engagements.

- **Frequency Period** - This field determines the time period used to control the frequency with which a Customer can earn points through marketing engagements. Can be set to One-time only, Daily, Weekly, Monthly, or Yearly.
- **Issues Per Period** - The number of times a Customer can earn points through marketing engagements during the Frequency Period. Set to 1 if the Frequency Period is One-time only.
- **Unlimited Issuance** - Determines whether points can be issued an unlimited number of times during the Frequency Period.
- **Rule Count Limit** - The total number of times a Customer can earn points through marketing engagements.

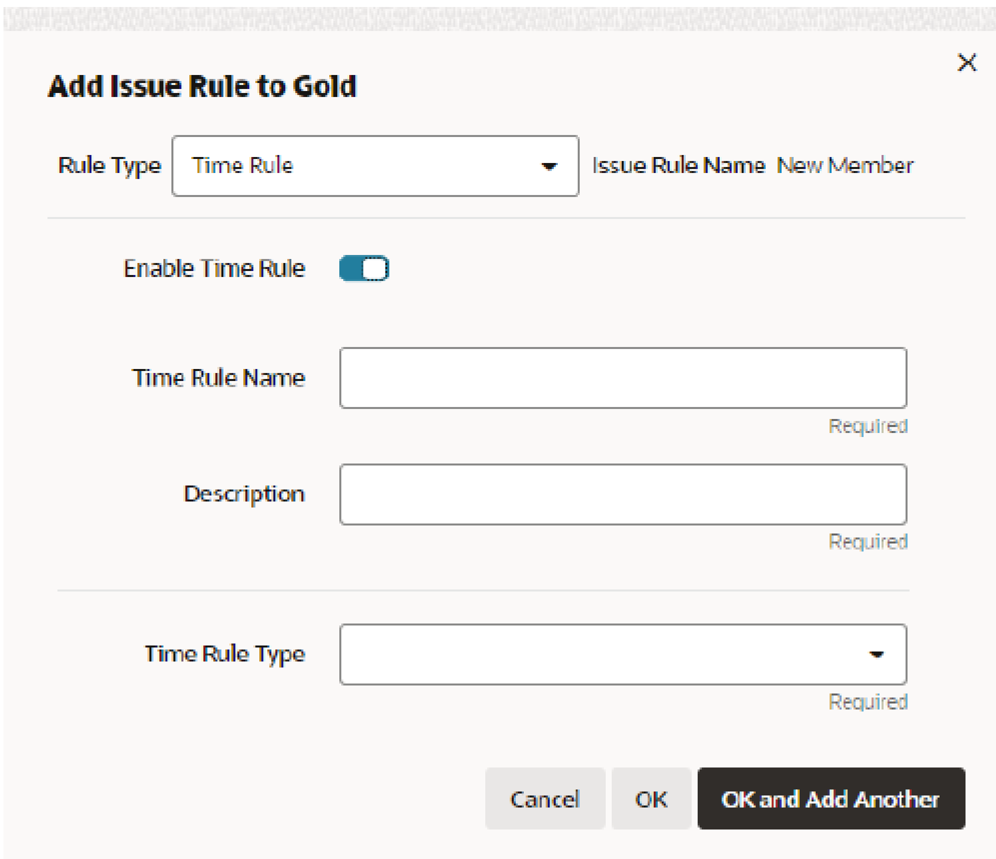
Rule Types - Rules to set limits on how and when Issue Rules are applied and used.

> **Note:**
>
> Availability of Rule types are based on a previously selected Calculation Type.

> **Note:**
>
> The next section deals with the seven Rule Types available. They can be combined within a single Issue Rule.

Time Rule - Defines the time rules when loyalty points can be issued for a loyalty program, that rewards customers when they purchase during specific hours and date ranges.

Figure 10-28 Time Rule

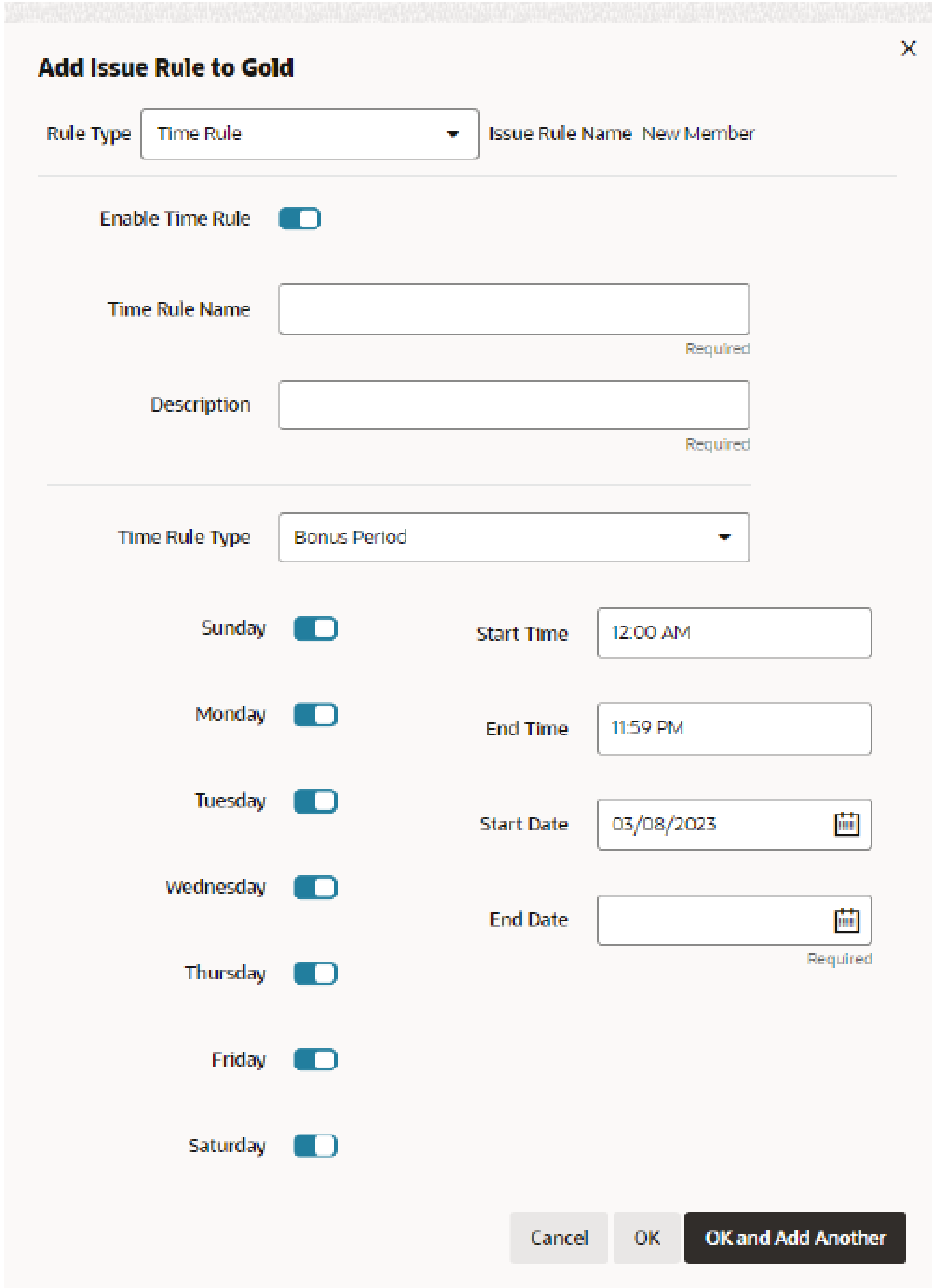


- **Enable Time Rule** - Toggle to **On** to activate Time Rule Name, Description, and Time Rule Type fields.

> **Note:**
>
> This switch can be turned off after defining the rules so there are no limitations to the time the issue rule applies.

- **Time Rule Name** - Name of the Time Rule.
- **Description** - Description of the Time Rule.
- **Time Rule Type** - Types include:
  - Birthday Anniversary
  - Signup Anniversary
  - Bonus Period
  - Blackout Period

Figure 10-29 Time Rule Type - Bonus Period/Blackout Period Options



Bonus/Blackout Period Time Type Configuration

- Select the **Day of the Week** for which the time rules will apply for this Item Rule.
- Enter a **Start Time**.
- Enter an **End Time**.
- Enter a **Start Date**.
- Enter an **End Date**.

> **Note:**
>
> Each Rule Type configuration is saved during the process. To configure more Rule Types, select a Rule Type from the options list. Do not click OK until all desired Rule Types are configured.

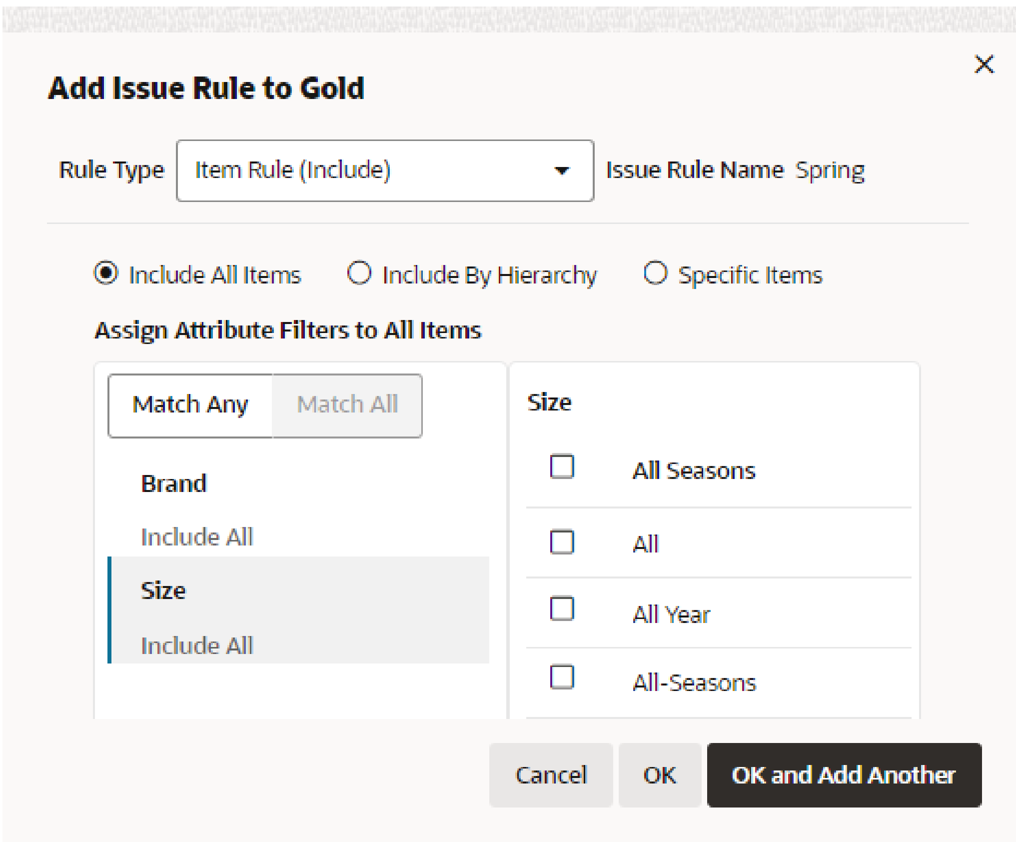
- If no more Rule Types are desired, click **OK** to save, **Cancel** to close without saving, or click **OK and Add Another** to create additional Issue Rules for that Loyalty Level. Otherwise continue to configure additional Rule Types.

  Item Rule (Include) or Item Rule (Exclude)

  Defines which items are eligible to accrue loyalty points. Both Rule Types are configured in the same way by selecting either: Include All Items, Include By Hierarchy, or Specific Items

- To configure a Rule Type by using **Include All Items**:

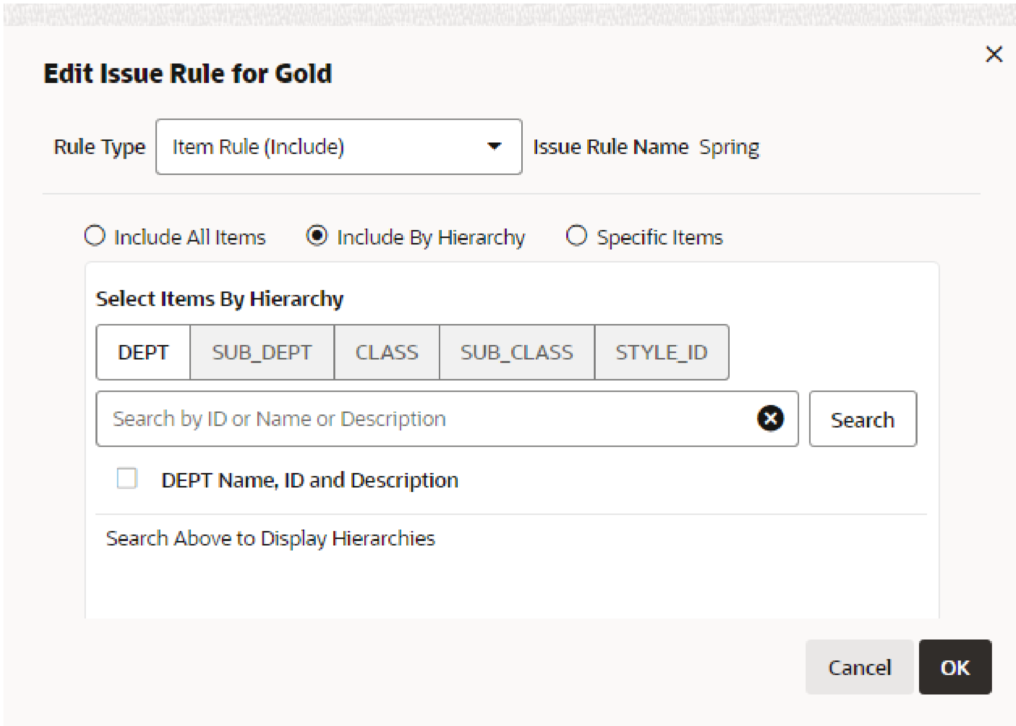
Figure 10-30 Item Rule (Include) - Include All Items



  – In the left pane, select the desired attribute filter from the list of available choices. Once selected, any associated values for the attribute appear in the right pane.
  – In the right pane, select or clear values of the selected attribute filter. You can add all values for that attribute by selecting the check mark in the top check box.
  – Repeat the process for any or all the available Attribute Filters in the left pane.

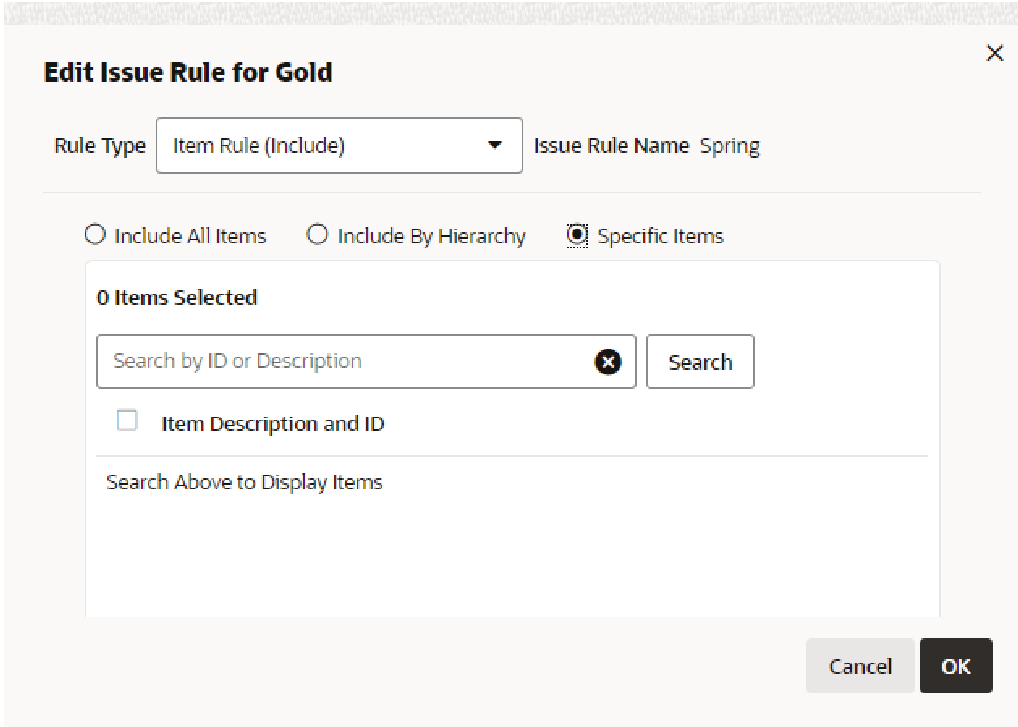
- To configure a Rule Type by using **Include By Hierarchy**:

Figure 10-31 Item Rule (Include) - Include By Hierarchy



  – In the Search by ID or Name or Description field, enter any part or entire **Hierarchy ID**, **Name**, or **Description**.
  – Click **Search**.
  – Select or clear values of the selected attribute filter. You can add all values for that attribute by selecting the check mark in the top check box.
- To configure a Rule Type by using **Specific Items**:

Figure 10-32   Item Rule (Include) - Specific Items

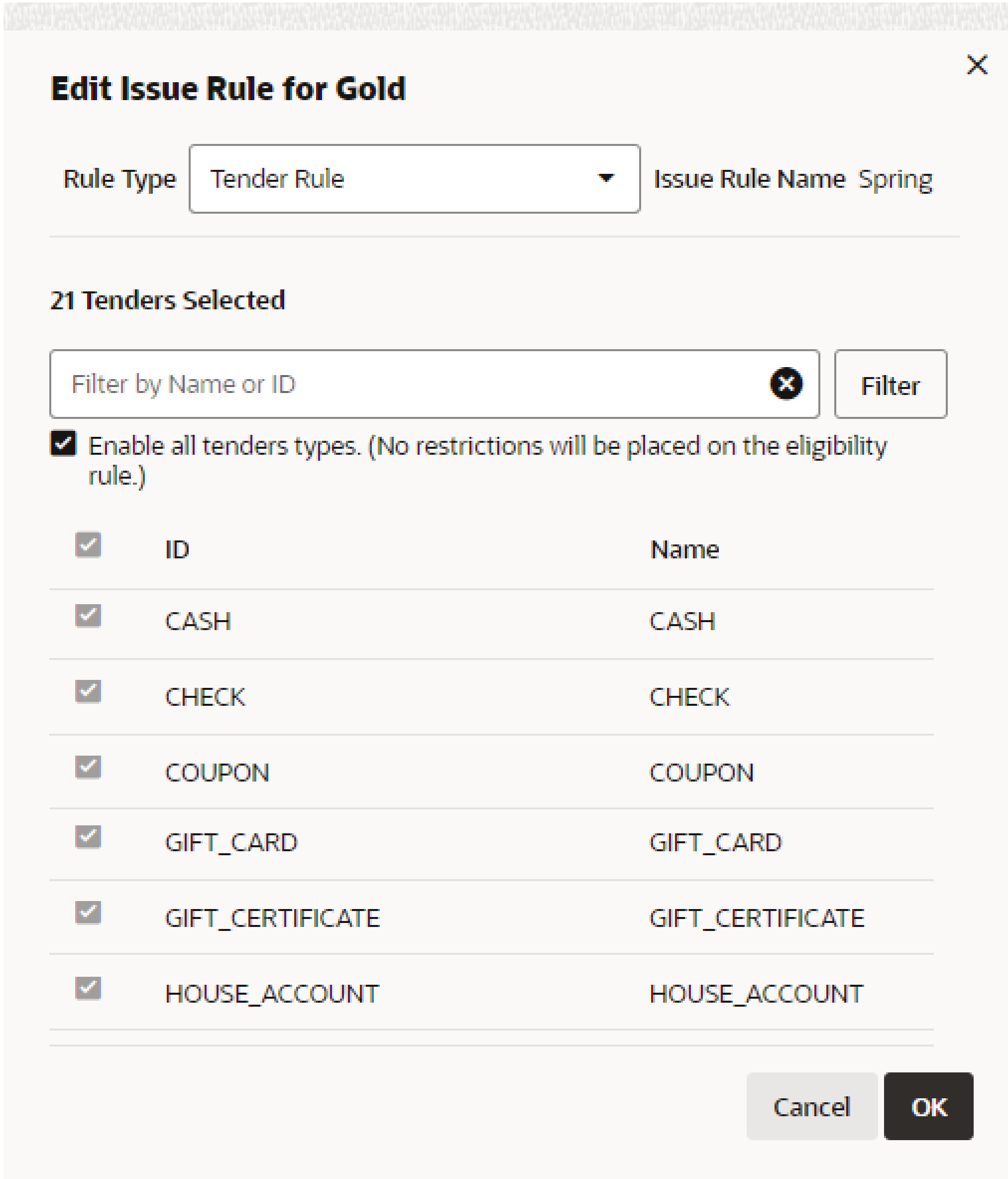


- In the Search by ID or Description field, enter any part or entire **Item ID** or **Description**.
- Click **Search**.
- Select or clear values of the selected attribute filter. You can add all values for that attribute by selecting the check mark in the top check box.

Tender Rule

This can be used to define when the customer uses specific tender types, the customer is eligible for points to be issued.

Figure 10-33 Tender Rule



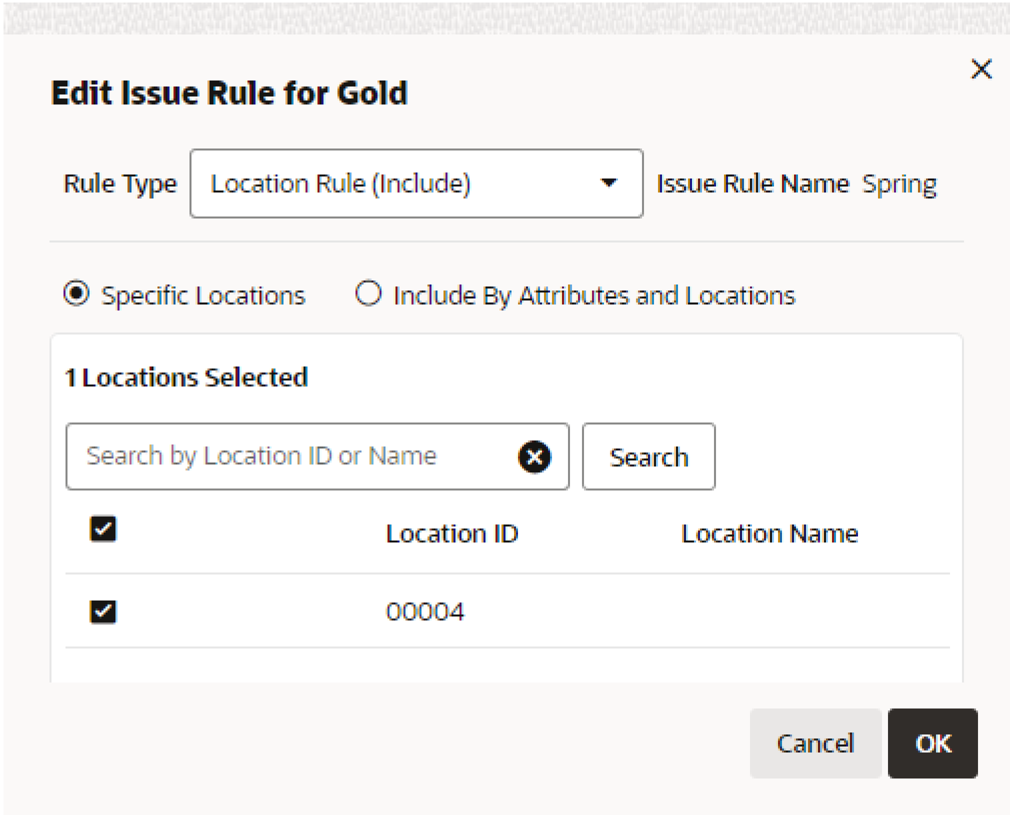
- In the Filter by Name or ID field, enter any **part** or **entire Tender Name** or **ID**.
- Click **Filter**.
- You can clear Enable All Tender Types by clearing the check mark in the top check box. Then you can look through the list and choose specific tenders by selecting the associated check box.

Location Rule (Include) or Location Rule (Exclude)

Defines which locations are eligible to accrue loyalty points. Both Rule Types are configured in the same way.

- **Specific Locations**

Figure 10-34 Location Rule (Include) - Specific Locations



> **Note:**
>
> The Location ID check box at the top of the list enables you to clear or select all locations. If you clear all the locations, then you can scroll through the list or search for a specific location.

– Enter **part** or **all** of a **Location ID** or **Name**.

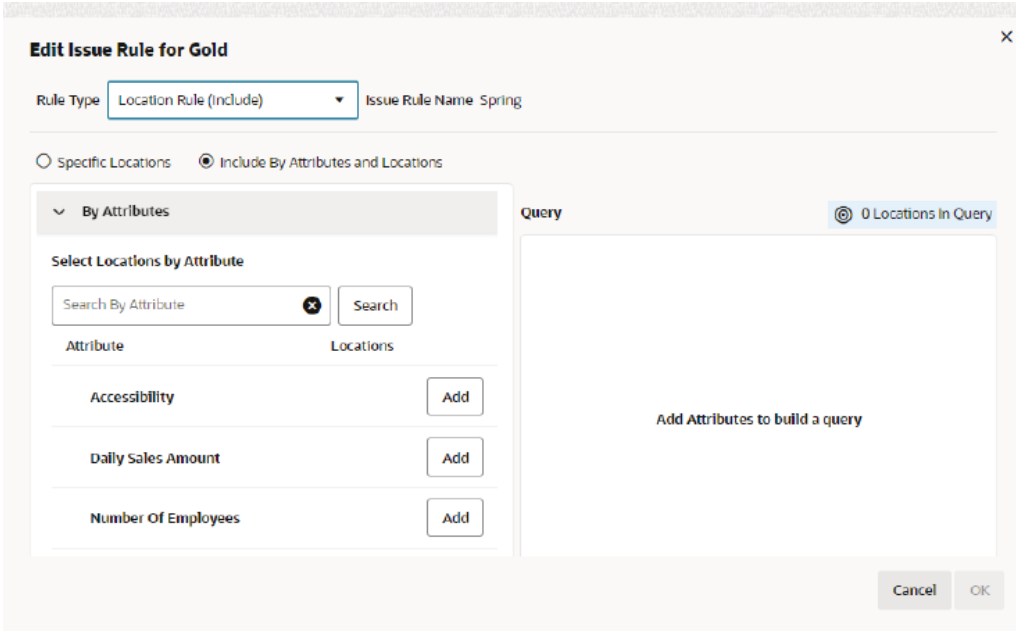
– Click **Search**.

– Choose specific Locations by selecting the associated check box.

OR

- Include By Attributes and Locations/Exclude By Attributes and Locations

Figure 10-35 Location Rule (Include) - Include By Attributes and Locations

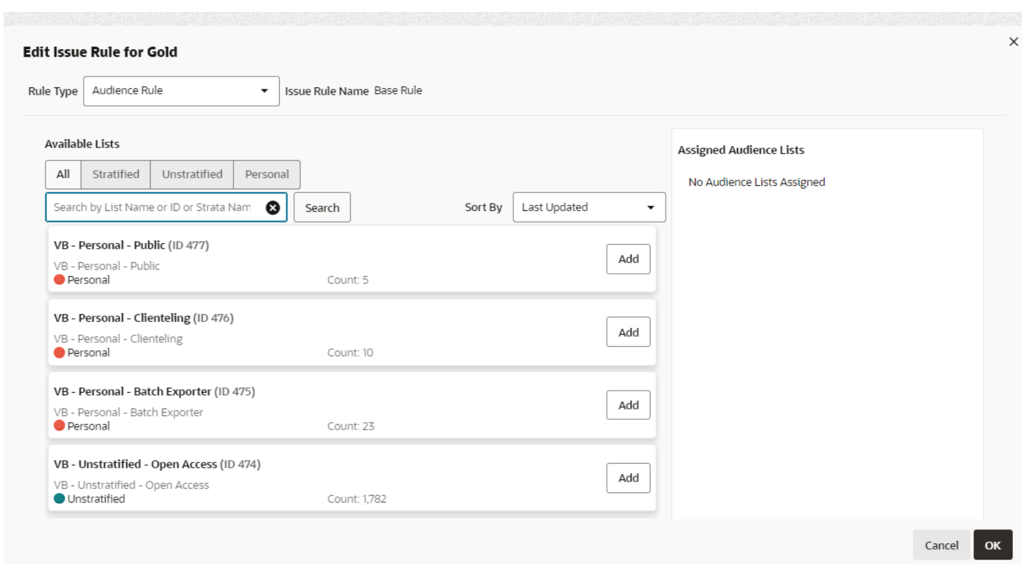


- Click **Add** to select an attribute. The By Attributes and By Location options can be collapsed or expanded.
- After the initial selection, additional choices display in the query with the condition, **Or** (one or more of the conditions must be met). Click **Or** to change to **And** (both conditions must be met).
- Click the **Vertical Ellipsis** and select **Remove** to clear the attribute from the query.

Audience Rule

If an audience rule is created, only customers in the selected lists will earn points.

Figure 10-36 Audience Rule



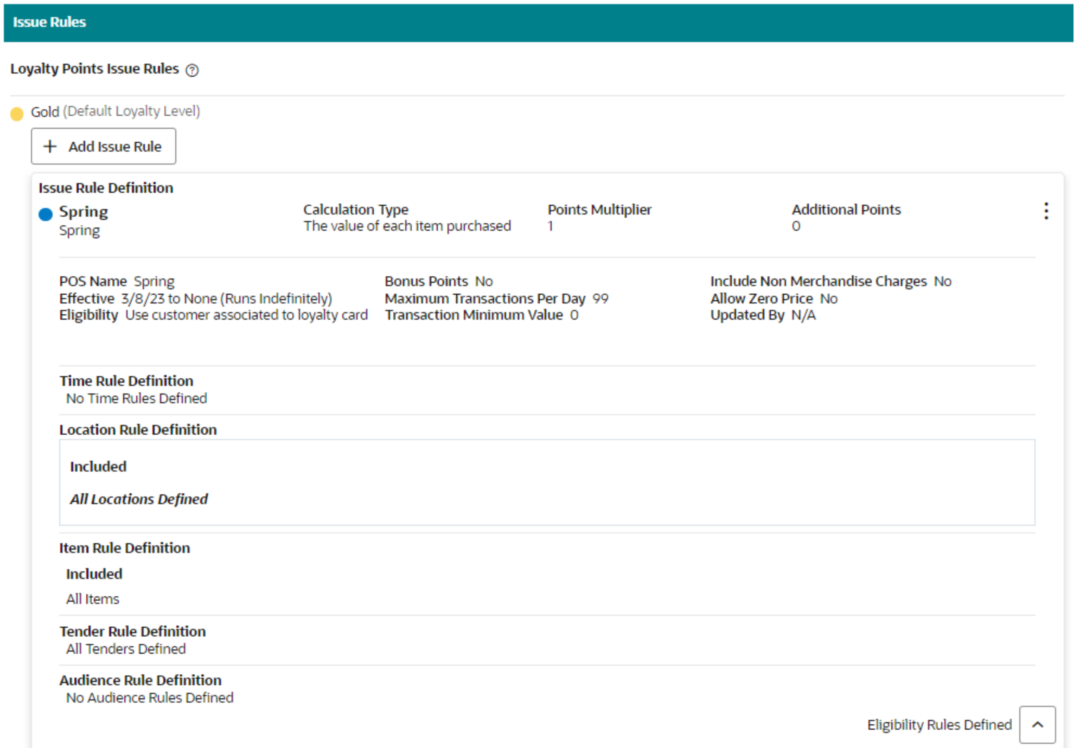
- Select an Available List type.
  - **All** - Default
  - **Stratified** - The customers within a Stratified list are divided into levels.
  - **Unstratified** - The customers within an Unstratified list are not differentiated into separate groups.
  - **Personal** - customers maintained by the user.
- In the Search field, enter **part** or **all** of the **List Name**, **ID**, or **Strata Name**.
- Click **Search**. The results can be sorted by using the Sort by list menu with the following options:
  - Last Updated
  - Name
  - Customer Count
- Click **Add** for each Available List to add the selection to the Assigned Audience Lists.

> **Note:**
>
> Lists with more than one group display an Expand icon. Click the **Expand** icon to see the available choices within that list.

- Click **OK** to save, click **Cancel** to close without saving, or click **OK and Add Another** to save the configured Rule Types and configure additional Issue Rules.

23. Review the Issue Review Definition area as shown in Figure 10-37. Click the **Vertical Ellipsis** to **Edit** or **Remove** the Issue Rule.

Figure 10-37 Issue Rule Definition



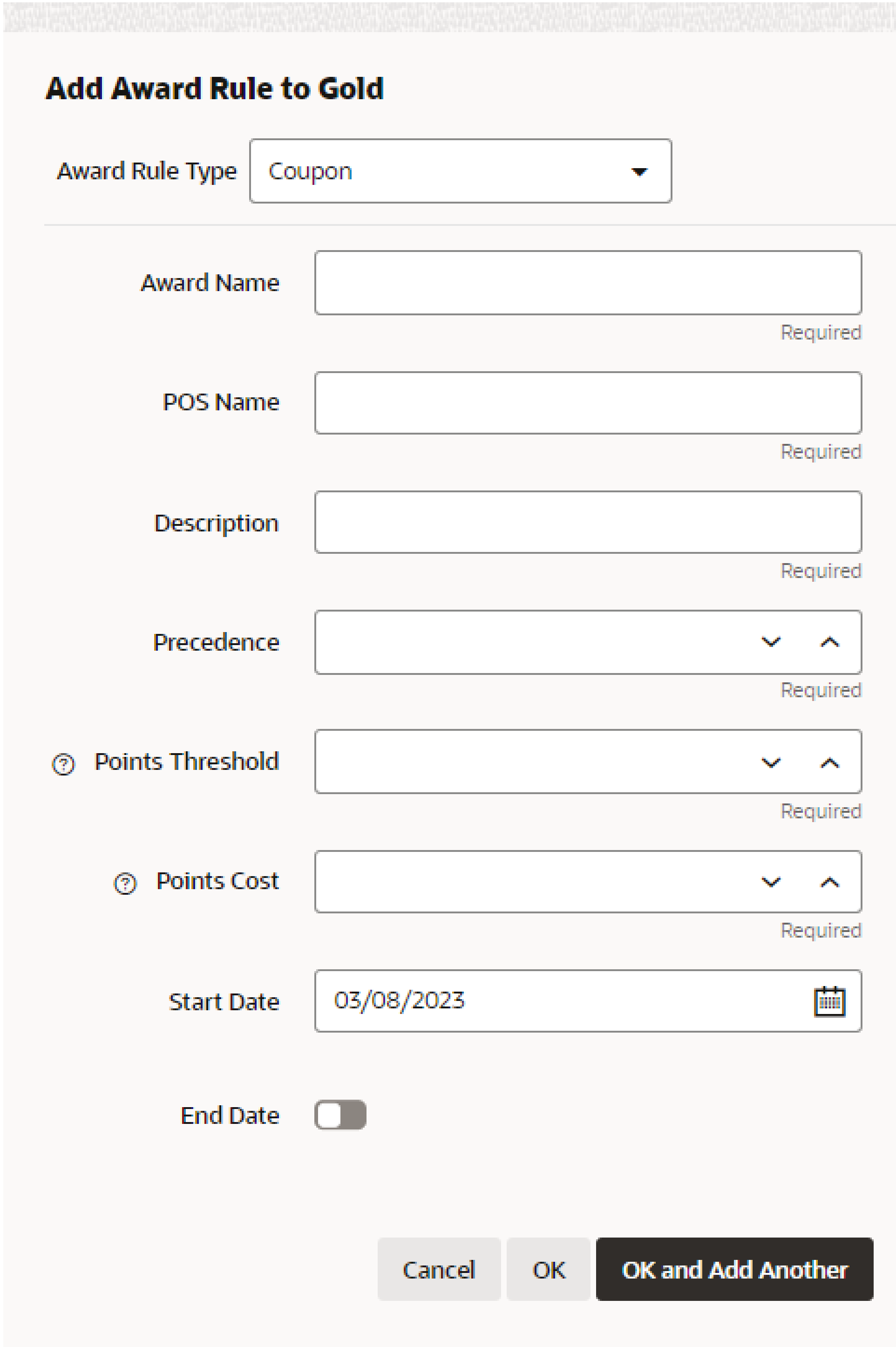
24. When finished entering all Issue Rules, click **Next** to go to the **Award Rules** tab.
25. Enter the following for the **Award Rules** tab. The Award Rules tab contains a Layer List of rules that determine how Coupon, E Award, or Award Certificates are issued by the Loyalty Level.
    - Click the **+ Add Award Rule** button.

    > **Note:**
    >
    > 'The Award Rules Tab, in the Loyalty Program, defines what awards can be issued, when an award can be issued based on the loyalty points balance and the points cost to use the award. An award program is required to hold an Award Certificate or E-Award value. Therefore, when creating a new card, Coupon is the only available Award Type Rule, since an existing award program is not required.

    - Select an **Award Rule Type** (Coupon -Default) and enter the following:

      Coupon

Figure 10-38 Award Rule Type - Coupon

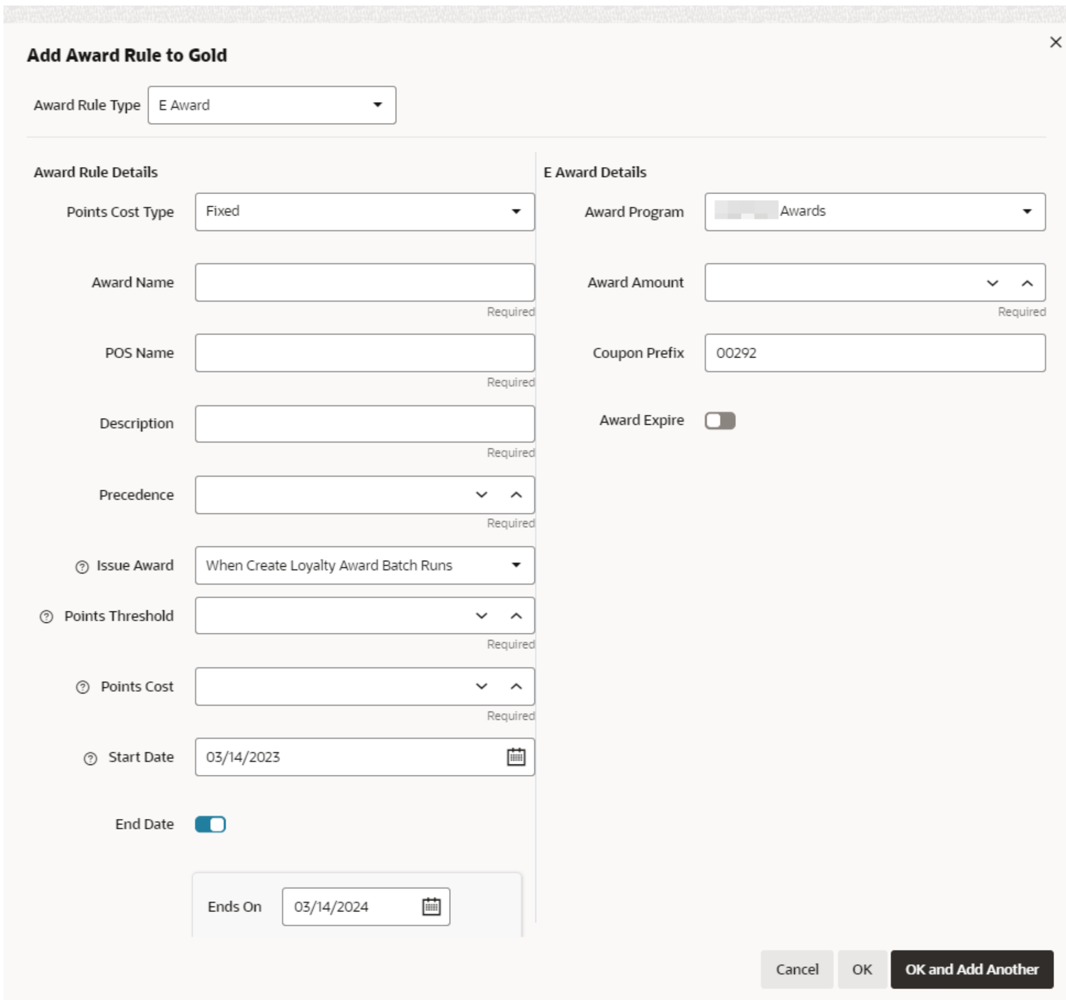


- Award Name
- POS Name
- Description
- Precedence (Order in which the Award Rule will be applied if more than one Award Rule is effective).

- Points Threshold (The customer's loyalty account balance must be equal to or greater than the number entered in this field to issue this award).
- Points Cost
- Start Date
- End Date - Toggle the End Date **On** to enter an End Date if desired.

E Award

Figure 10-39 Award Rule Type - E Award



Awards Rule Details

- Enter the **Points Cost Type**. The fields in the Award Rules Details section for an E Award will change depending upon the value in the Points Cost Type Selection Menu
  - **Fixed** - E Award is a fixed amount.
  - **Cashback** - E Award value will depend upon the number of points in the Loyalty Account, which allows for full redemption.
- Enter the **Award Name**.
- Enter the **POS Name**.

- Enter the **Description**.
- Enter the **Precedence** (Order in which the Award Rule will be applied if more than one Award Rule is effective).
- Select **Issue Reward** setting.

> **Note:**
>
> When the Issue Certificate is set to Immediately Upon Transaction Posting, the award certificate will be issued to a customer account as soon as the system processes the purchase activity. If the selection is set to When Create Loyalty Award Batch Runs, the award certificate will not be issued after the scheduled batch job runs.

- Enter the **Award Factor** (Cashback only). A multiple used to convert points to an E-Award amount (in the base currency of the Award Program).
- **Reset Balance** (Cashback only) - Indicates whether the loyalty points balance is reset when the Award is issued.
- Enter the **Points Threshold**.
- Enter the **Start Date**.
- **End Date** - Toggle the End Date to **On** to enter an End Date if desired.

E Award Details

- Select an **Award Program**.

> **Note:**
>
> The list will display the award programs already on the selected card

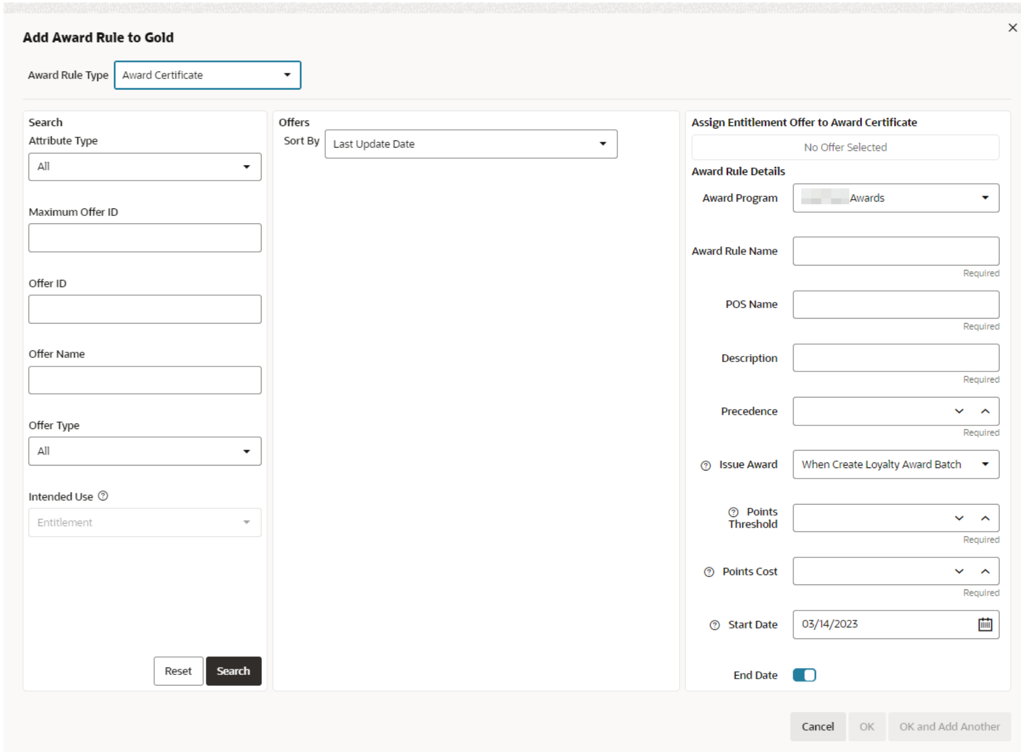
- Enter the **Award Amount**.
- Enter the **Minimum Award Amount** (Cashback only).
- Enter the **Coupon Prefix**.
- **Award Expire** - Toggle on to configure expiry settings.
  - Select **Expiration Type**.

    Relative - Enter the Expires After value and select a Time Period.

    Program - E Award will use the Award Expiration defined for the award program the E Award will be held in.

Award Certificate

Figure 10-40 Award Rule Type - Award Certificate



There are five sections; Search, Offers, Assign Entitlement Offer to Award Certificate, Award Rule Details, and Certificate Details.

- **Search** - Use this section to populate the Offers Section. Fields include:
  - Attribute Type
  - Maximum Offer ID
  - Offer ID
  - Offer Name
  - Offer Type
  - Intended Use

> **Note:**
>
> The Intended Use field is disabled and uses the default value of Entitlement. Only offers with an Intended Use of Entitlement are assigned to an award certificate.

- Click **Search** to populate the Offers Section. Click **Reset** to clear all Search fields.
- **Sort By** - Select an option to sort by the following:
  - Last Update Date
  - Offer ID
  - Offer Name

  - Offer Type
- Click **Add** to populate the Assign Entitlement Offer to Award Certificate section.

  Assign Entitlement Offer to Award Certificate
- Click the **X** to remove an offer. Return to the Offers section to select a new offer to assign.

  Award Rule Details
- Select the **Award Program**.

  > **Note:**
  >
  > An Award Certificate can be previously created in an Award Program on the same card as the Loyalty Program. Additionally, a new Award Certificate can be created from the Loyalty Program and associated with an Award Program on the same card. If an existing award certificate exists for the selected offer, the Award Program will be defaulted into the options list. If the offer is NOT associated with an existing award certificate, the first active award program on the card will display by default and the award certificate will be created from the Loyalty Program.

- Enter an **Award Rule Name**.
- Enter a **POS Name**.
- Enter a **Description**.
- Enter the **Precedence** (Order in which the Award Rule will be applied if more than one Award Rule is effective).
- Select **Issue Reward** setting.

  > **Note:**
  >
  > When the Issue Certificate is set to Immediately Upon Transaction Posting, the award certificate will be issued to a customer account as soon as the system processes the purchase activity. If the selection is set to When Create Loyalty Award Job Runs, the award certificate is issued after the scheduled job runs.

- Enter the **Points Threshold**.
- Enter the **Points Cost**.
- Enter the **Start Date**.
- **End Date -** Toggle the End Date to **On** to enter an **End Date** if desired.
- Enter the **Coupon Prefix**.
- **Award Certificate Expires** - Toggle to **On** to configure the expiry settings.
  - Select an **Expiration Type**.

    Relative - Enter the **Expires After** value and select a **Time Period**.

    Program - Award Certificate will use the Award Expiration defined for the award program the Award Certificate will be held in.

Certificate Details

> **Note:**
>
> If the user selects an offer that is already assigned to an existing award certificate, the fields in the Certificate Details section will be populated and will be read only.

- Enter the **Award Certificate Name**.
- Enter the **Description**.
- Enter the **Precedence** (Order in which the Award Rule will be applied if more than one Award Rule is effective).
- Toggle **Unlimited Redemption** to **On** to allow unlimited redemptions.
- Enter the **number** of **Maximum Redemptions** (Displays when Unlimited Redemptions is OFF).

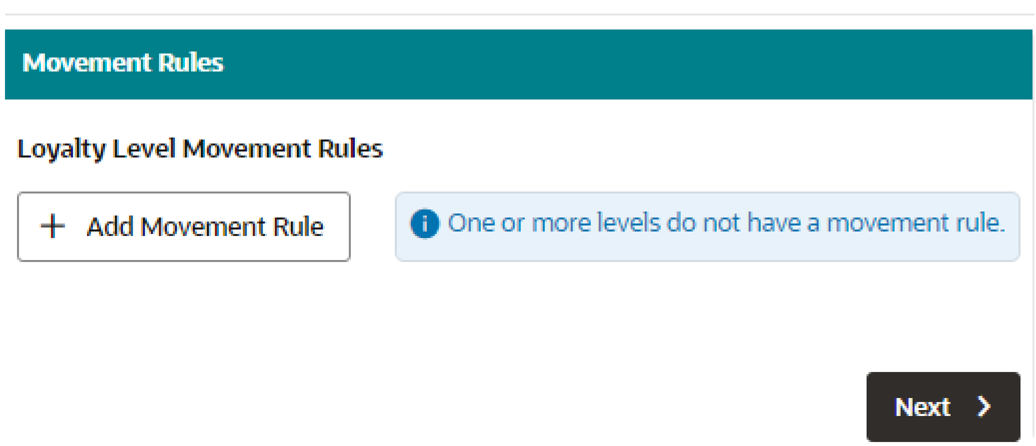
26. Either click **OK** to accept all changes for the configured Award Rules or click **Cancel** to close without saving.

> **Note:**
>
> Before you save the Program, you can use the **tab links** along with **Previous** and **Next** to go back to any point in the create program process and make changes.

27. When finished entering all **Award Rules**, click **Next** to go to the **Movement Rules** tab.

Movement Rules determine how customers are moved from one Loyalty Level to another. Movement Rules are accessed through the Loyalty Level to which they belong.

Figure 10-41 Movement Rules Tab



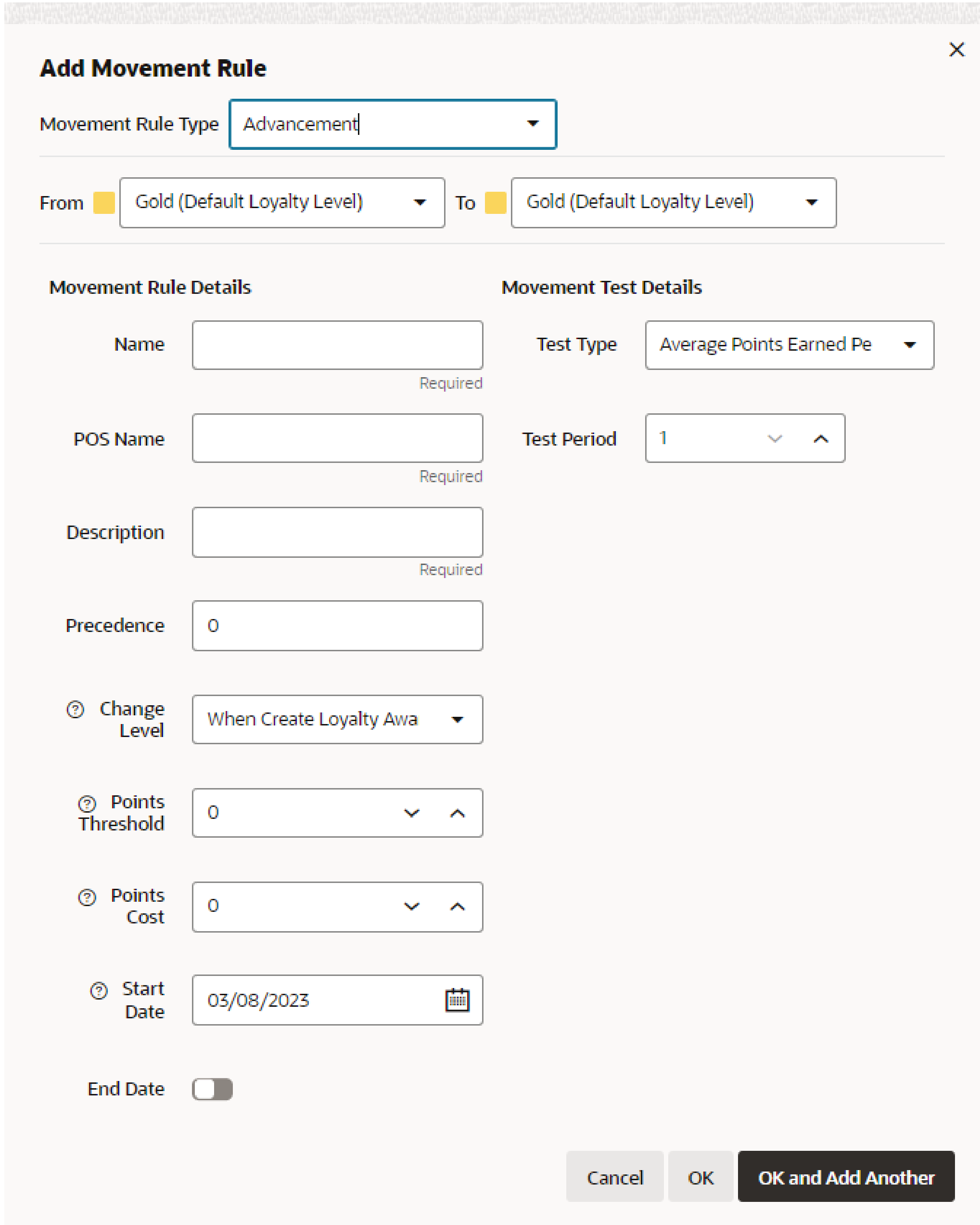
- Click **+ Add Movement Rule**.

- Select a **Movement Rule Type**.
  - **Advancement** - The Customer Account is moving to a higher level.
  - **Sustain** - The move is a lateral move.
  - **Demotion** - The Customer Account is moving to a lower level.
- Select the **Levels** to configure using the **From**, **To**, or **Sustain** option list.

> **Note:**
>
> Advancement and Demotion Movement Rule Types both use the From and To option lists. The Sustain Movement Rule Type uses the Sustain option list. All three Movement Rule Types share the same Movement Rule and Test Details.

Movement Rule Details

Figure 10-42   Movement Rule Details



- Enter the **Name**.
- Enter the **POS Name**.
- Enter the **Description**.
- Enter the **Precedence** (Order in which the Award Rule will be applied if more than one Movement Rule is effective).
- Select **Change Level** setting.

> **Note:**
>
> When the Change Level is set to Immediately Upon Transaction Posting, the movement rule will be applied to a customer account as soon as the system processes the purchase activity. If the selection is set to When Create Loyalty Award Job Runs, the movement rule will be applied when the scheduled job runs.

- Enter the **Points Threshold**.
- Enter the **Points Cost**.
- Enter the **Start Date**.
- **End Date** - Toggle the End Date to **On** to enter an **End Date** if desired.

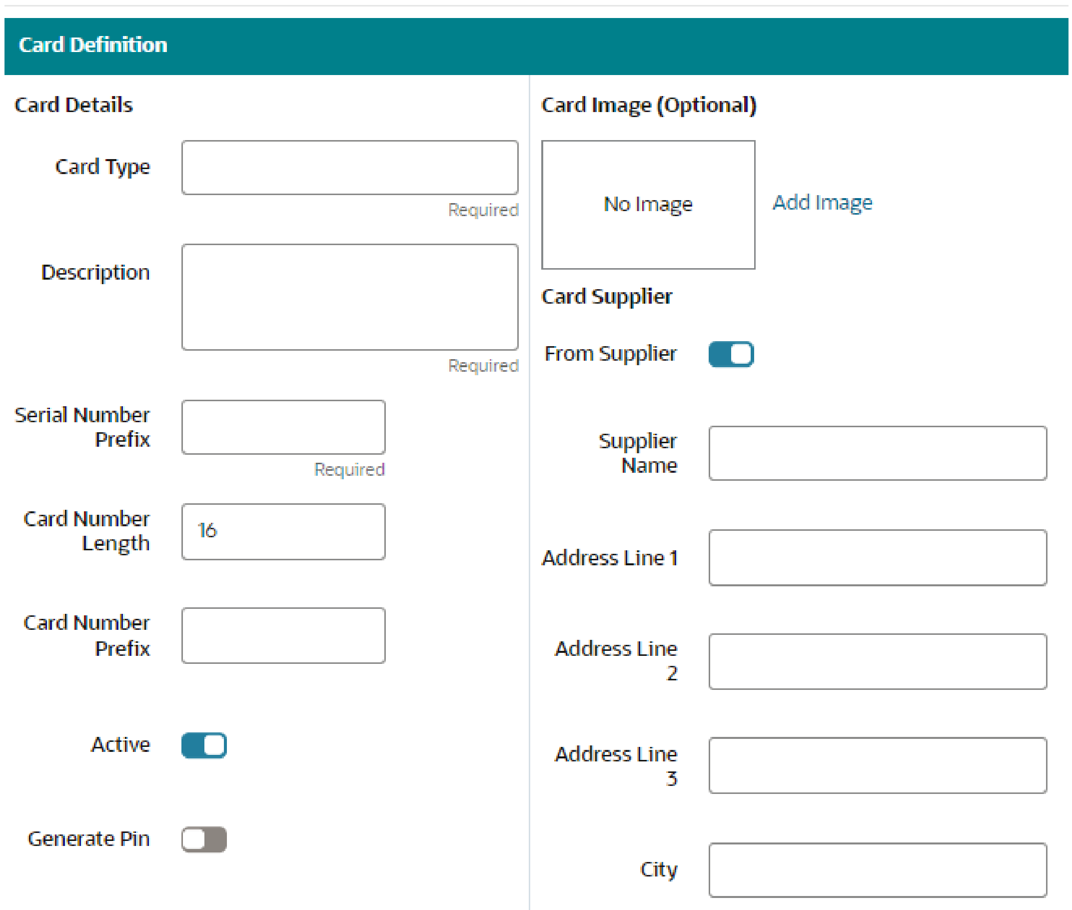
  Movement Test Details
- Select the **Test Type**. Type of test performed to determine whether a Customer should be moved. This Selection Menu has the following options:
  - **YTD Points** - Movement depends upon the number of points earned year-to-date in the Customer account.
  - **LTD Points** - Movement depends upon the number of points earned lifetime-to-date in the Customer account.
  - **Points Earned Since Last Level Move** - Movement depends upon the number of points earned since the last level move, or the creation of the Customer account.
  - **Average Points Earned Per Month** - Movement depends upon the average number of points earned per month in a defined number of months.
  - **Time Period Since Last Level Move** - Movement occurs after a defined period of time has passed since the last level move, or the creation of the Customer account.
- Enter the **Test Period**. The number of periods (from Test Period Type) used for the movement test (visible only if the Test Type is either Average Points Earned Per Month or Time Period Since Last Level Move).
- Enter the **Test Period Type**. The type of period used for the movement test (visible only if the Test Type is Time Period Since Last Level Move)
- **Extend Sustain Period** - When the toggle is on, then customers remain at the same level for an additional amount of time past the test period until the customer meets additional criteria.
  - Select the **Extension Test Type**.
  - Enter the **Extension Test Period** (only visible when the Extension Test Type is Average Points Earned Per Month).
  - Enter the **Extension Points Threshold**.
  - Enter an **Extend By** value.
  - Enter the **Period Type**.
- Click **OK** to save, click **Cancel** to close without saving, or click **OK and Add Another** to save the Movement Rule and configure additional Movement Rules.

28. When finished defining Movement Rules do the following:

- If you are creating a **new** card, click **Next** to proceed to **Step 29** the Card Definition tab.
- If you are assigning an **existing** card, click **Next** to proceed to **Step 38**, the Review tab for the Loyalty Program.

29. The **Card Definition** tab allows you to add a card image and identify the contact details if there is a supplier for the physical cards. Enter the following information:

Figure 10-43 Card Definition Tab



Card Details

- **Card Type** - Type of Card.
- **Description** - Description of Card.
- **Serial Number Prefix** - The Card Serial Number Prefix for this Card Definition.
- **Active** - Indicates whether the Card Definition is currently active.
- **Generate Pin** - Toggle on to enable Customer Engagement to generate PINs for the Cards.
  - **PIN Length** - The length of each PIN. (This field is only visible if the Generate Pin Toggle is On). Enter 0 [default] for Cards that will not have PINs.
- **PIN Required** - For each Check Box, indicate whether a PIN is required for that situation. (These fields are only visible if the Generate Pin Toggle is On.)

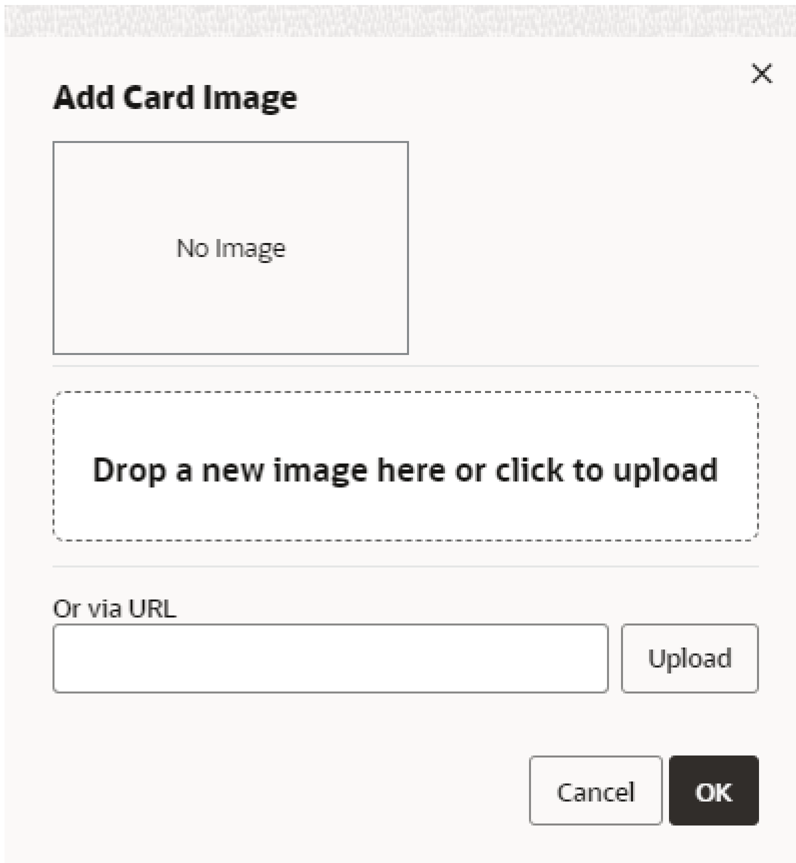
- **Always** - A customer must enter a PIN every time their Card is used.
- **Without Card** - A customer must enter a PIN if they do not have their Card.

Card Image (Optional)

You can also edit the image once it has been added.

- Click **Add Image**. The Add Card Image window opens.

Figure 10-44 Add Card Image



To add a new Card Image, either:

- **Drag and Drop** a new image as shown in Figure 10-44.
- Click anywhere in the **Drop a new image here or click to upload box**.
- **Or Via URL** - Enter the **URL** of the image, then click **Upload** to complete the process.

- Either click **OK** to create the add the card image or click **Cancel** to close without saving.

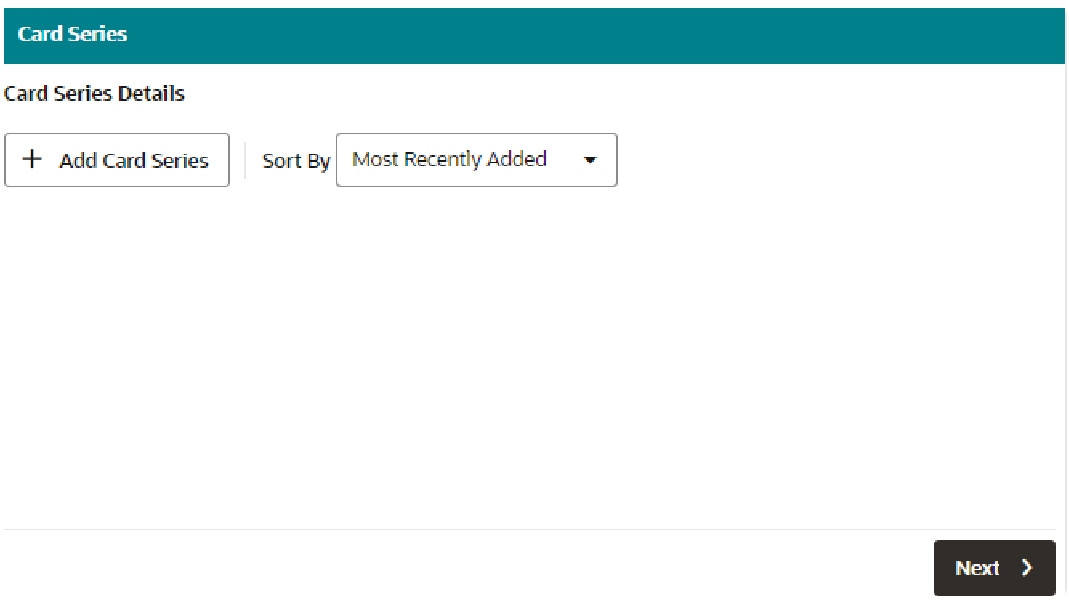
Card Supplier

- From Supplier - Toggle **On** to enter the following Supplier details:
  - Supplier Name
  - Address Line 1

- Address Line 2
- Address Line 3
- City
- State
- Postal Code
- Country
- Phone Number

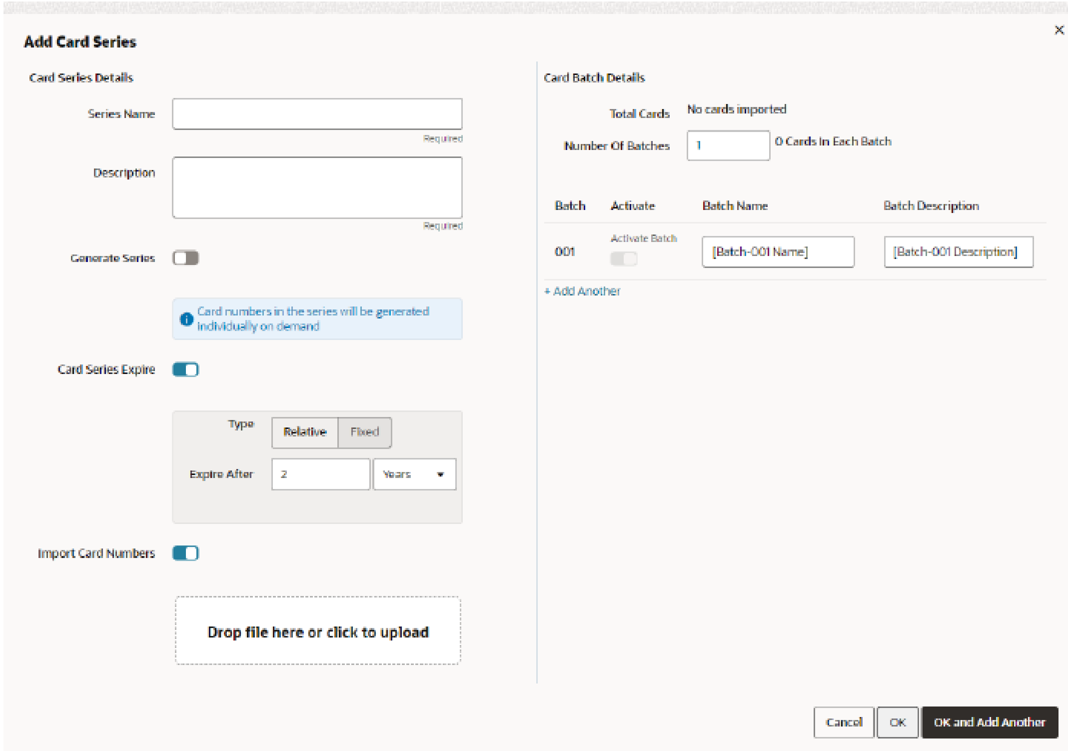
30. When finished entering the Program information on the **Card Definition** tab, click **Next** to continue to the **Card Series** tab.

Figure 10-45 Card Series Tab



31. The **Card Series** tab enables you to setup a new card series at the same time you are defining a new card. Enter the following information:

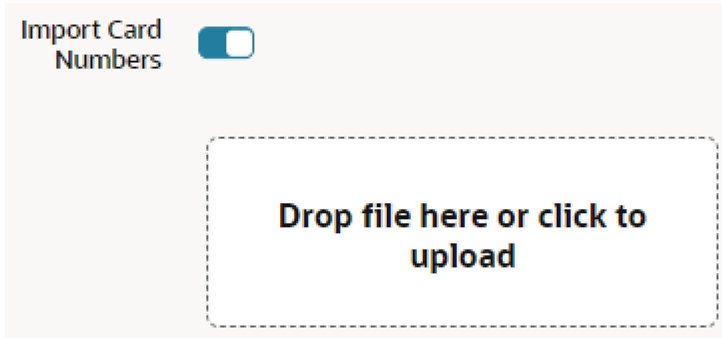
Figure 10-46 Add Card Series



Card Series Details

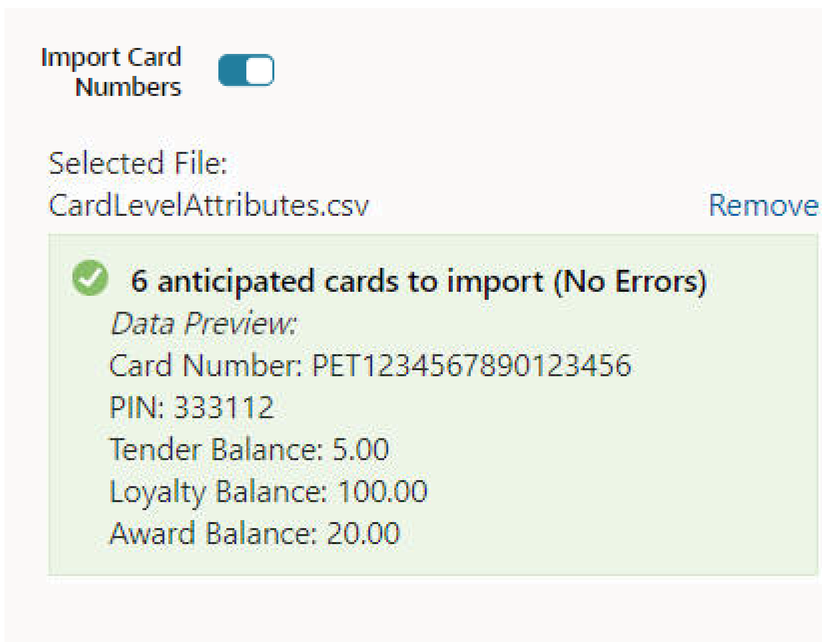
- **Series Name** - Name of the Card Series Distribution.
- **Description** - Description of the Card Series Distribution.
- **Generate Series**
  - Toggle on - When the wizard is completed, the card series is generated.
  - Toggle off (Default) - Card numbers in the series are generated individually on demand.
- **Card Series Expire** - Determines the type of expiration date to use for the Card Series Distribution. This Selection Menu has the following options:
  - **Relative** - The ending expiration date will be a certain, defined period of time after the initial activation date. If this option is selected, the Expire After section displays the Number of Periods and Period Type fields.
  - **Fixed** - Beginning and ending expiration dates are defined by the User.
- To Import Card Numbers, either:
  - **Drag and Drop** a file as shown in Figure 10-47.

Figure 10-47 Import Card Numbers



– Click anywhere in the **Drop file here or click to upload** box.

Figure 10-48 Import Card Numbers



Card Import File Field Information

When importing external card numbers for a card series, the Import File listing the numbers must have the following fields for each line:

- CARD_NUMBER [required]
- CARD_PIN_NUMBER [optional]
- Tender Balance Amount [optional]
- Loyalty Balance Amount [optional]
- Award Balance Amount [optional]
- ATTRIBUTE NAME 1 [optional]
- ATTRIBUTE VALUE 1 [optional], but required if ATTRIBUTE NAME 1 specified

- ATTRIBUTE NAME 2 [optional]
- ATTRIBUTE VALUE 2 [optional], but required if ATTRIBUTE NAME 2 specified
- ATTRIBUTE NAME 3 [optional]
- ATTRIBUTE VALUE 3 [optional], but required if ATTRIBUTE NAME 3 specified
- ATTRIBUTE NAME 4 [optional]
- ATTRIBUTE VALUE 4 [optional], but required if ATTRIBUTE NAME 4 specified
- ATTRIBUTE NAME 5 [optional]
- ATTRIBUTE VALUE 5 [optional], but required if ATTRIBUTE NAME 5 specified

A placeholder must be used for all fields. For example, to include a card number of 1234567890123456 with a PIN of 123456, a Tender Balance Amount of 10, a Loyalty Balance Amount of 20, an Award Balance Amount of 30, and a CARD_REDEMPTION_ INFO attribute of Redeemed Solon, OH, the following line would be included in the Import File:

1234567890123456,123456,10,20,30,CARD_REDEMPTION_INFO,"Redeemed Solon, OH",,,,,,,

Note the empty fields for the remaining four attribute names and values in the example.

Card Import File Validation

- The card numbers cannot be duplicates to any cards already in the database.
- The card number prefixes must be valid for the card definition.
- The activation amounts must be valid numbers.
- The card number length does not need to match the length specified for the card definition.
- If an activation amount is provided in the import file, the card will be activated upon creation. If no amounts are provided the card will remain inactive.
- The activation amounts are in the program's base currency.

Remove an Imported File

You have the option to remove the file at any time before the wizard is completed. Click **Remove** to remove the imported file.

> **Note:**
>
> The Import Card Numbers option is not allowed once cards have been generated for the card series.

Card Batch Details

- **Total Cards** - Total Number of cards to be generated for the Card Definition.

> **Note:**
>
> This field is filled in automatically when card numbers are imported.

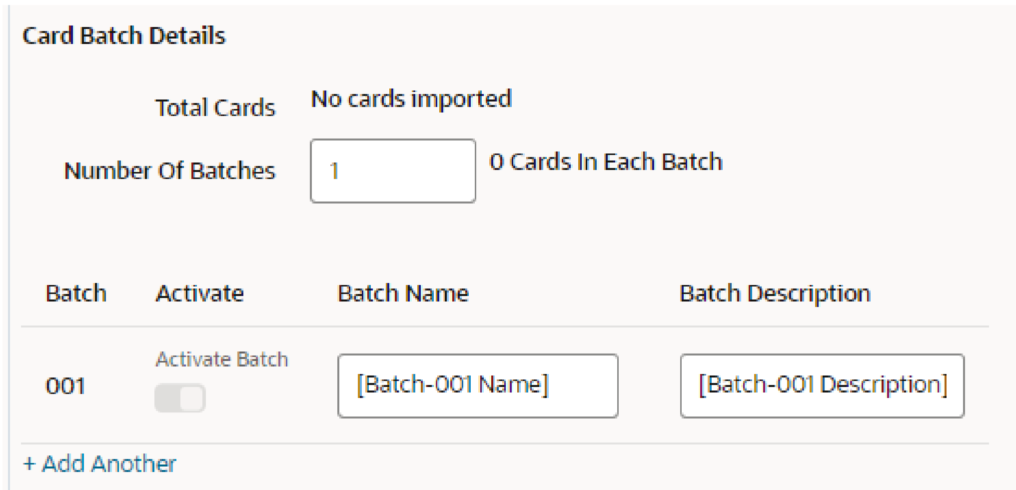
- **Number of Batches -** The number of separate Card batches included in the Card Series Distribution.

  Activate Cards

  When the wizard is completed, the cards in the batch set to activate will be set to active. If this is toggled off, the cards can be activated from the **Card Series** tab or from the **View Card** screen.

  To activate a set of Cards within Card Series configuration:

Figure 10-49 Card Batch Details



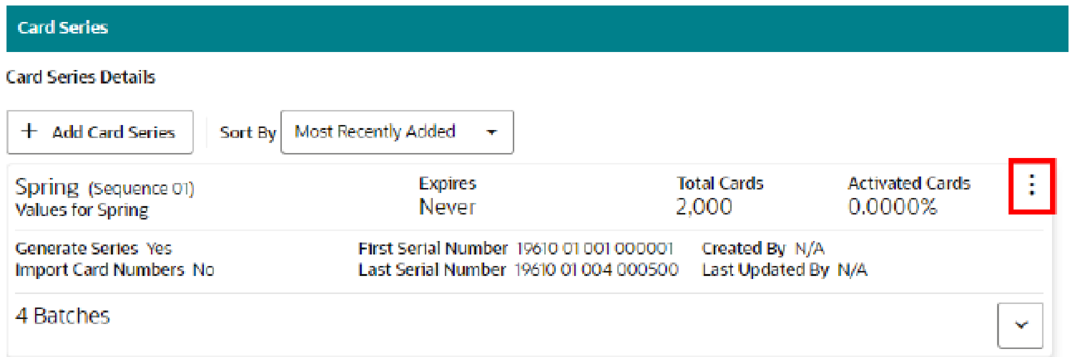
- **Activate** - Toggle on to activate the Cards when the wizard is completed.
- Enter a **Batch** Name.
- Enter a **Batch Description**.

> **Note:**
>
> Click **+ Add Another** to add another batch. You can also adjust the **Number of Batches** field. Click the **X** icon next to each Batch to remove a batch from the list.

- Click **OK** to add the Card Series to the Program or click **OK and Add Another** to add another Card Series. Click **Cancel** to close the window without adding the Card Series.

Edit Card Series

Figure 10-50 Card Series Details



To Edit an existing Card Series click the Action menu and select, **Edit**. The Edit Card Series window opens. See **Step 31**, the Card Series tab to edit the card.

Remove a Card Series

To Remove an existing Card Series, click the Action menu and select, **Remove**. The Card Series is deleted immediately.

> **Note:**
>
> Before you save the Program, you can use the **tab links** along with **Previous**, **Next**, or **Cancel** to go back to any point in the create program process and make changes.

32. When finished entering the Program information on the **Card Series** tab, click **Next** to continue to the **Attributes** tab.

    Enter the following for the **Attributes** tab. Attributes can be added to the Card Type to further distinguish qualifications for the Offer.

Figure 10-51 Attributes - Card Type Attributes

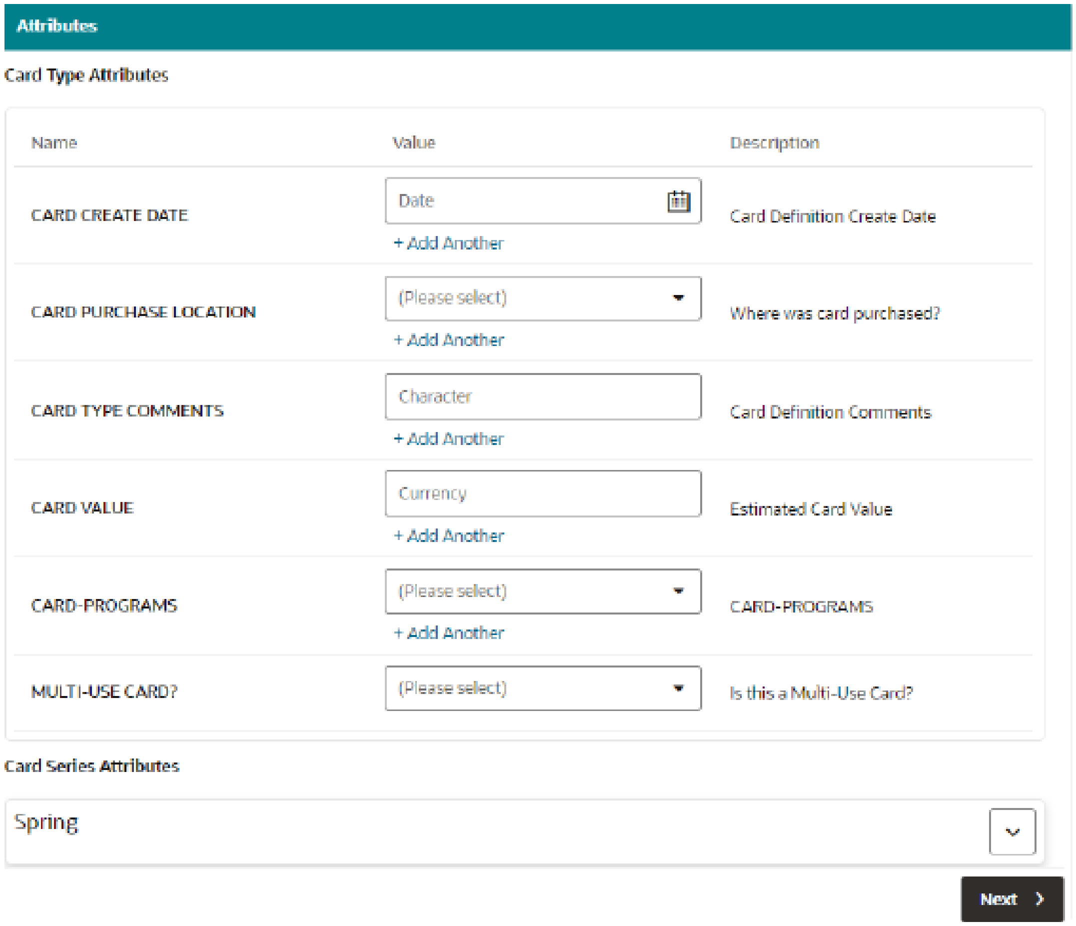
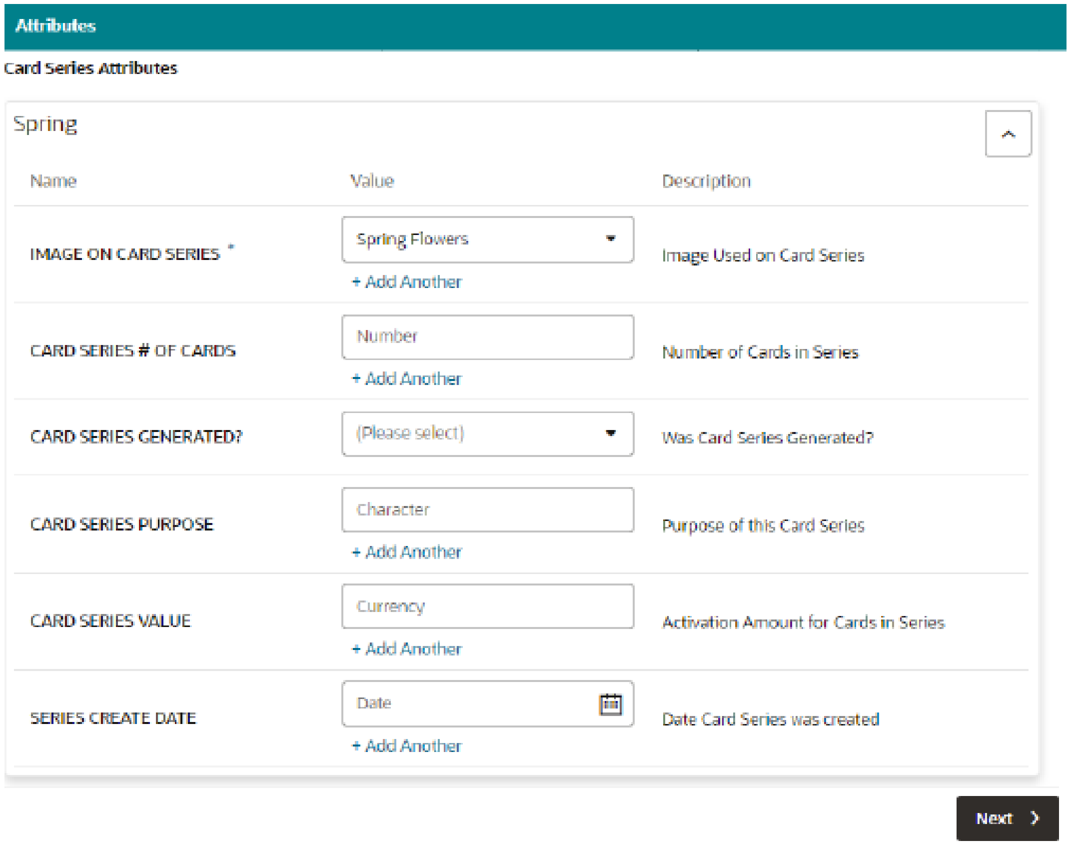


Figure 10-52 Attributes - Card Series Attributes

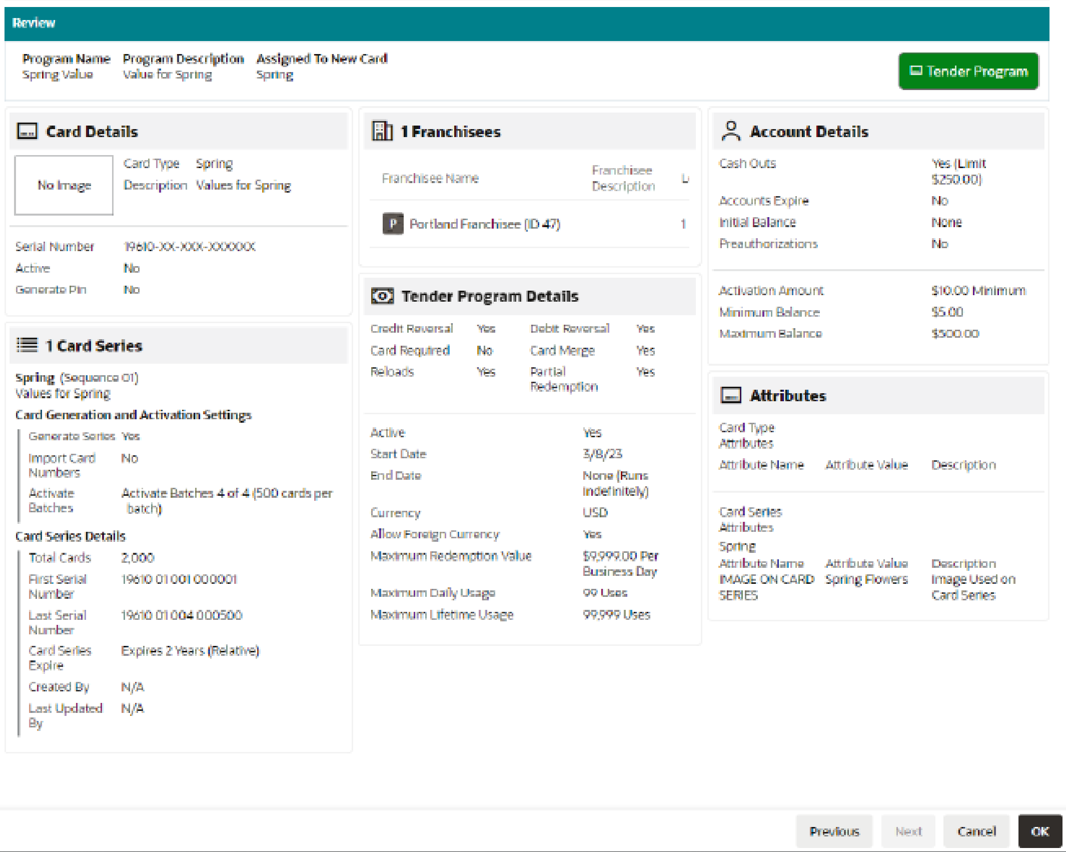


- Select or enter the **Values** for each of the required attributes (indicated by an asterisk*).
- Add **Values** for any optional attributes.
- Select or enter the **configuration value** for the Attribute.

> **Note:**
>
> Repeat this step for all optional Attributes you wish to add to the Card or Card Series.

33. When finished defining any attributes for the Program, click **Next** to continue to the **Review** tab (Assigned to New Card).
34. The **Review** tab (Assigned to New Card) displays key elements in the Program Setup. Review the following for the **Tender Program** Type.

Figure 10-53 Tender Program - Review Tab (Assigned to New Card)

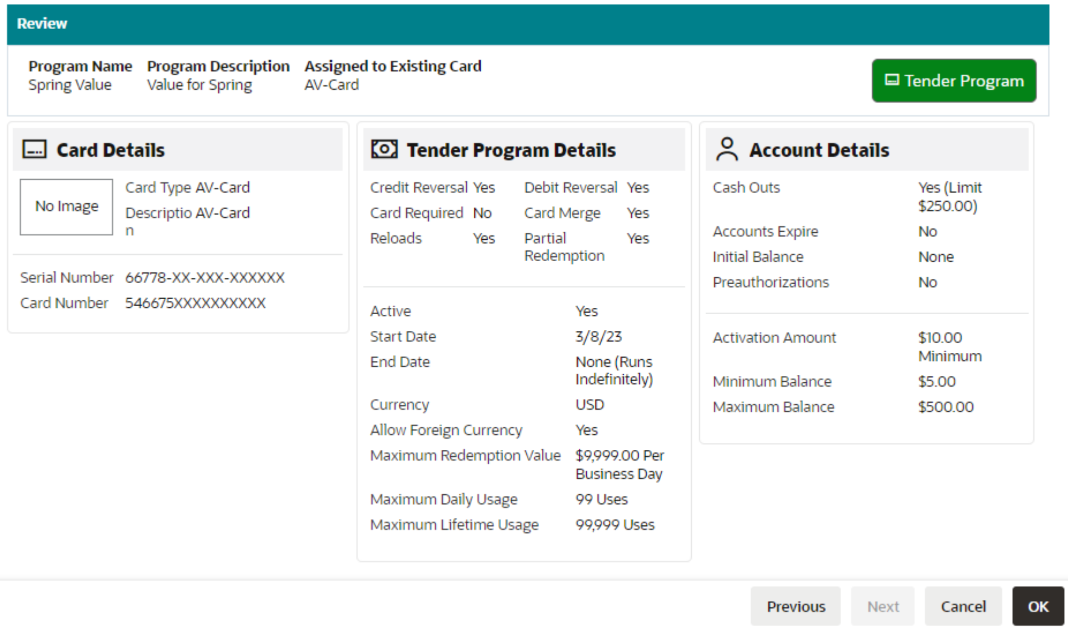


35. Either click **OK** to create the Program or click **Cancel** to close without saving.

> **Note:**
>
> Before you save the Program, you can use the **tab links** along with **Previous** and **Next** to go back to any point in the create program process and make changes.

36. The **Review** tab (Existing Card) displays key elements in the Program Setup. Review the following for the **Tender Program** Type.

Figure 10-54 Tender Program - Review Tab (Assigned to Existing Card)

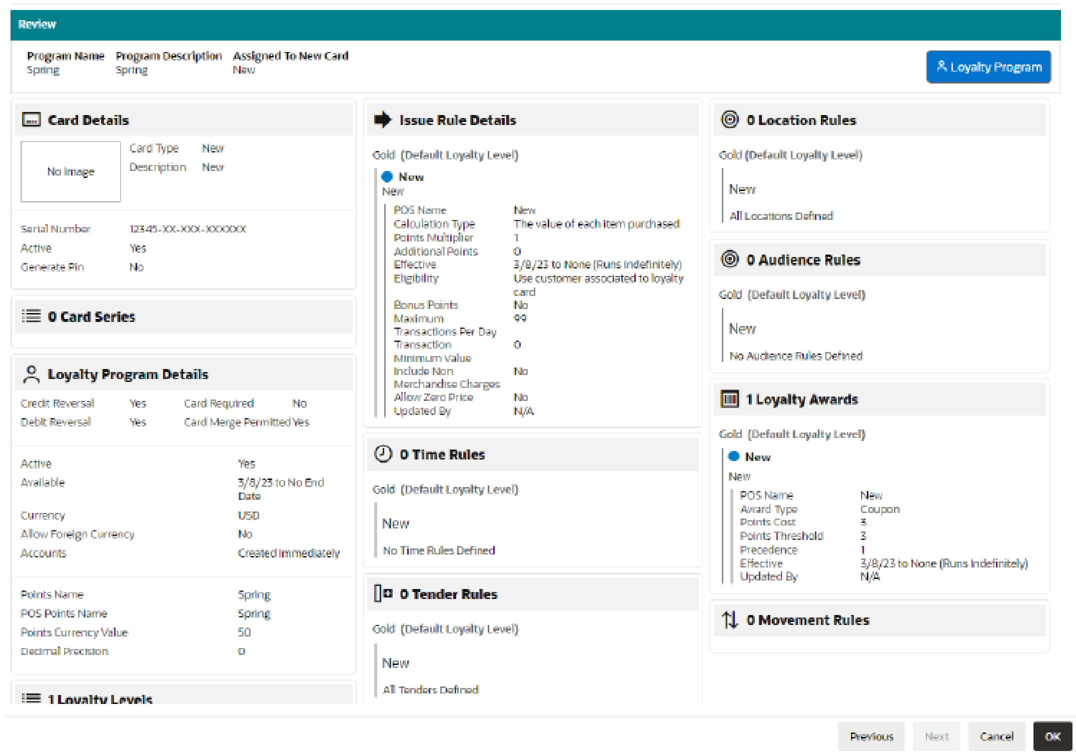


37. Either click **OK** to create the Program or click **Cancel** to close without saving.

> **Note:**
>
> Before you save the Program, you can use the **tab links** along with **Previous** and **Next** to go back to any point in the create program process and make changes.

38. The **Review** tab (Assigned to New Card) displays key elements in the Program Setup. Review the following for the **Loyalty Program** Type.

Figure 10-55 Loyalty Program - Review Tab (Assigned to New Card)

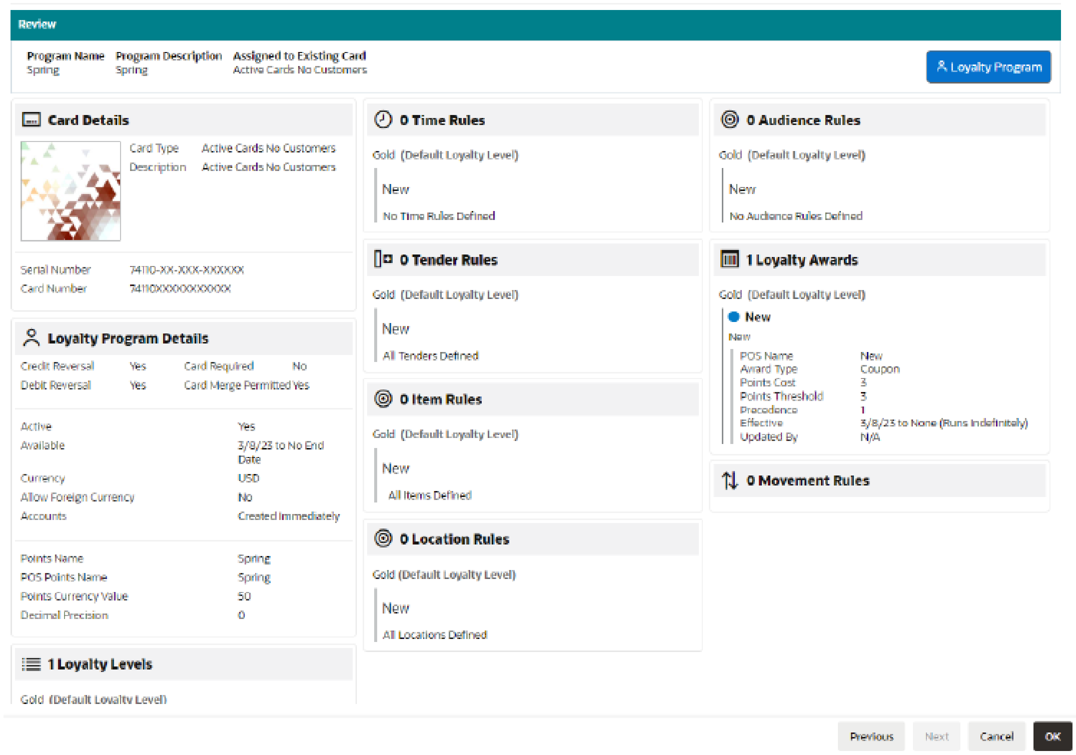


39. Either click **OK** to create the Program or click **Cancel** to close without saving.

> **Note:**
>
> Before you save the Program, you can use the **tab links** along with **Previous** and **Next** to go back to any point in the create program process and make changes.

40. The **Review** tab (Existing Card) displays key elements in the Program Setup. Review the following for the **Loyalty Program** Type.

Figure 10-56   Loyalty Program - Review Tab (Assigned to Existing Card)

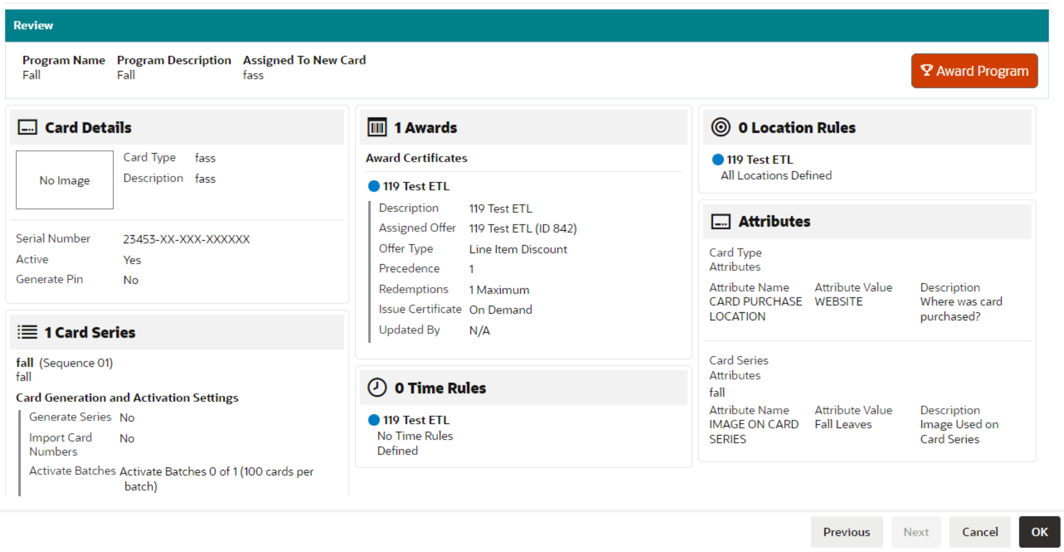


41. Either click **OK** to create the Program or click **Cancel** to close without saving.

> **Note:**
>
> Before you save the Program, you can use the **tab links** along with **Previous** and **Next** to go back to any point in the create program process and make changes.

42. The **Review** tab (Assigned to New Card) displays key elements in the Program Setup. Review the following for the **Award Program** Type.

Figure 10-57 Award Program - Review Tab (Assigned to New Card)

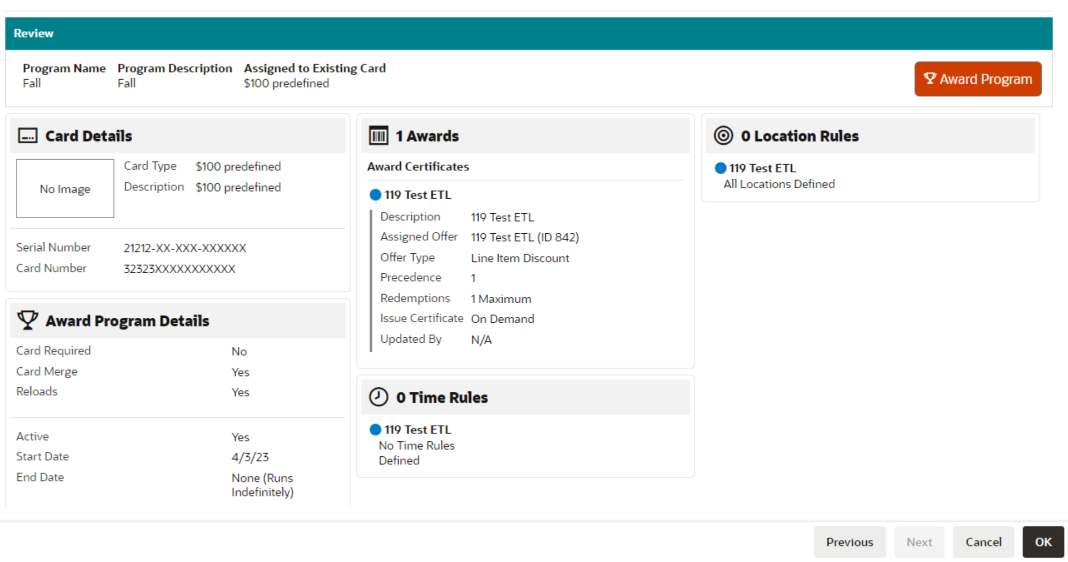


43. Either click **OK** to create the Program or click **Cancel** to close without saving.

> **Note:**
>
> Before you save the Program, you can use the **tab links** along with **Previous** and **Next** to go back to any point in the create program process and make changes.

44. The **Review** tab (Existing Card) displays key elements in the Program Setup. Review the following for the **Award Program** Type.

Figure 10-58 Award Program - Review Tab (Assigned to Existing Card)



45. Either click **OK** to create the Program or click **Cancel** to close without saving.

Note:

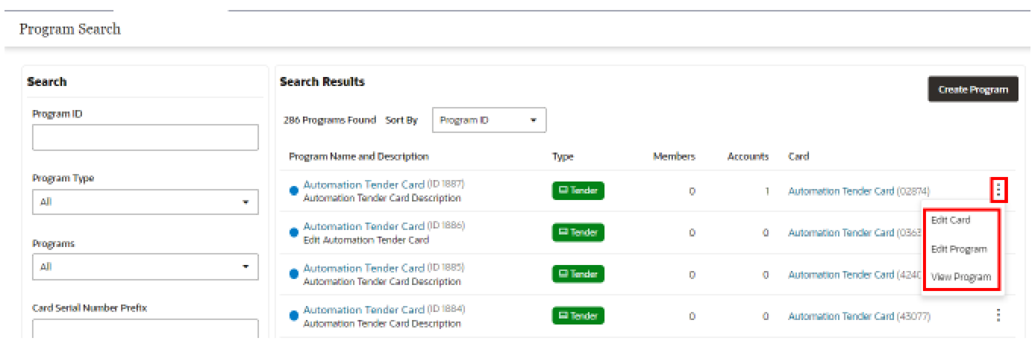
Before you save the Program, you can use the **tab links** along with **Previous** and **Next** to go back to any point in the create program process and make changes.

Editing Programs

You can access Programs for editing using the following methods to display the Edit Program option:

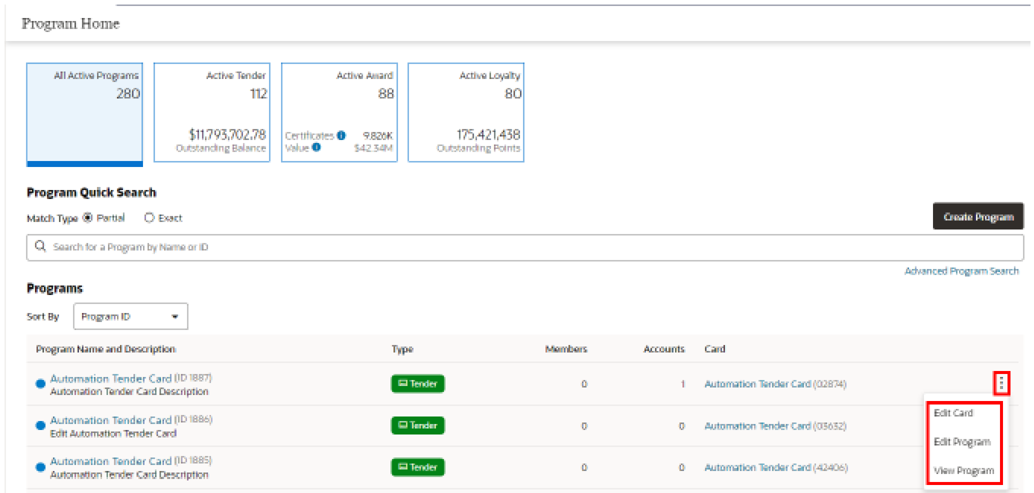
- Program Advanced Search Results
  - Click the **Action Menu** icon on the far right in the data display section for an individual **Program** in the Program Advanced Search window (**Program Result Section**).
  - Click **Edit Program**.

Figure 10-59 Action Menu Options (Program Advanced Search)



- Program Home Quick Search
  - Click the **Action Menu icon** on the far right in the data display section for each individual **Program** in the **Programs Quick Search** window located in **Program Home**.
  - Click **Edit Program**.

Figure 10-60 Action Menu Options (Program Quick Search)



Click **Done** to close the Program and return to the **Search Results**.

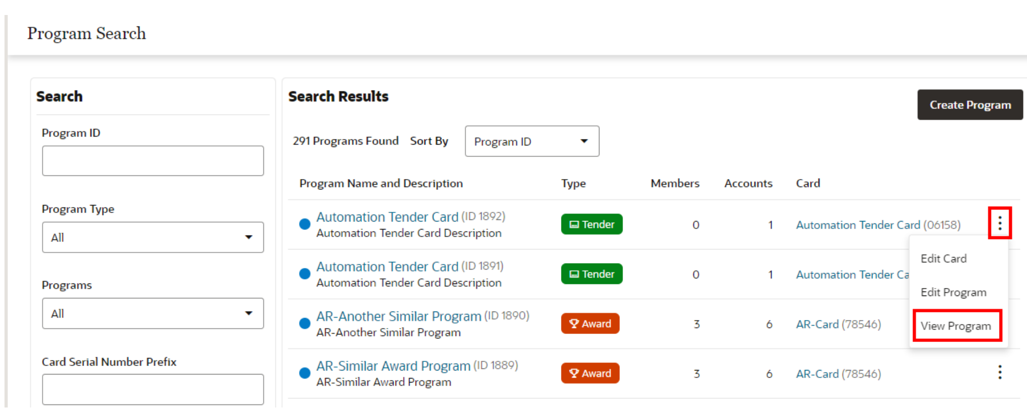
> **Note:**
>
> For detailed information on each section while editing a Program, see Creating a Program.

Viewing Programs

You can access a Program for viewing using the following methods to display the View Program option:

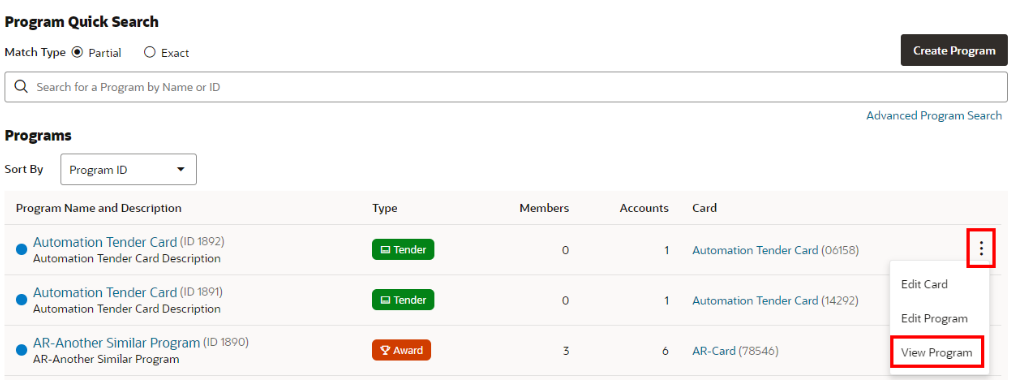
- Program Advanced Search Results
  - Click the **Action Menu** icon on the far right in the data display section for each individual **Program** in the Program Advanced Search window (**Program Search Results Section**).
  - Click **View Program**. The View Program screen displays. See Figure 10-64.

Figure 10-61 Action Menu Options (Program Advanced Search) - View Program



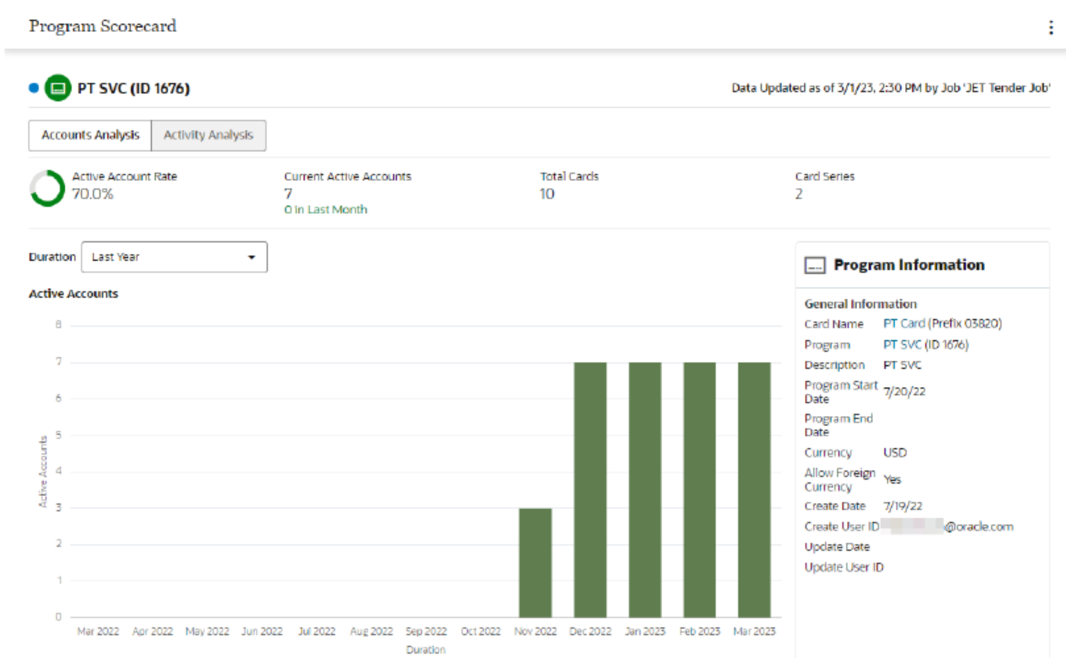
- Program Quick Search
  - Click the **Action Menu icon** on the far right in the data display section for each individual **Program** in the **Program Quick Search** window.
  - Click **View Program**. The View Program screen displays. See Figure 10-64.

Figure 10-62 Action Menu Options (Program Quick Search) - View Program



- Program Scorecard - Click the **Program Name** link in the Program Information panel. The View Program screen displays. See Figure 10-64.

Figure 10-63 View Program - Program Scorecard

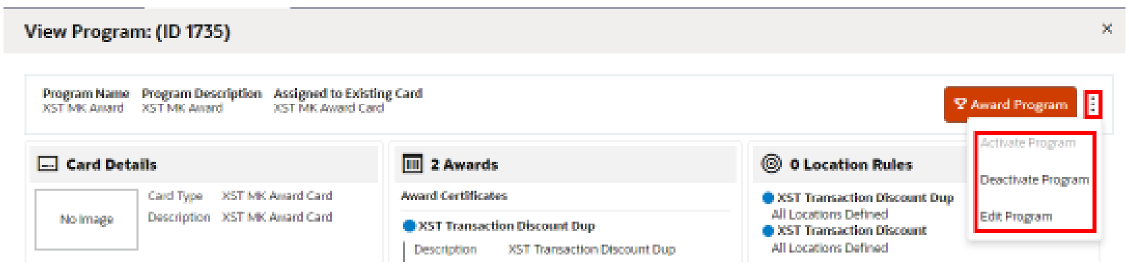


Note:

The Program Screen is a compilation of what is created during the Create Program wizard process and appears as the Review tab. See Creating a Program for more details about what each panel represents in the Program screen.

View Program - Action Menu Options

Figure 10-64 Program Screen



The Action Menu options include:

- **Activate Program** - Available when Program Status is Deactivated
- **Deactivate Program** - Available when Program Status is Activated
- **Edit Program** - See Editing Programs for details.

Click **Done** to close the Program and return to **Program Home**. For detailed information on each section see Creating a Program.

Cards

Cards include information about cards held by the customer and about the programs associated with each card. Programs include Tender, Award, and Loyalty.

Note:

This section deals with Cards associated with a Program. See Card Administration for information on administering Card and Account details.

Viewing Cards

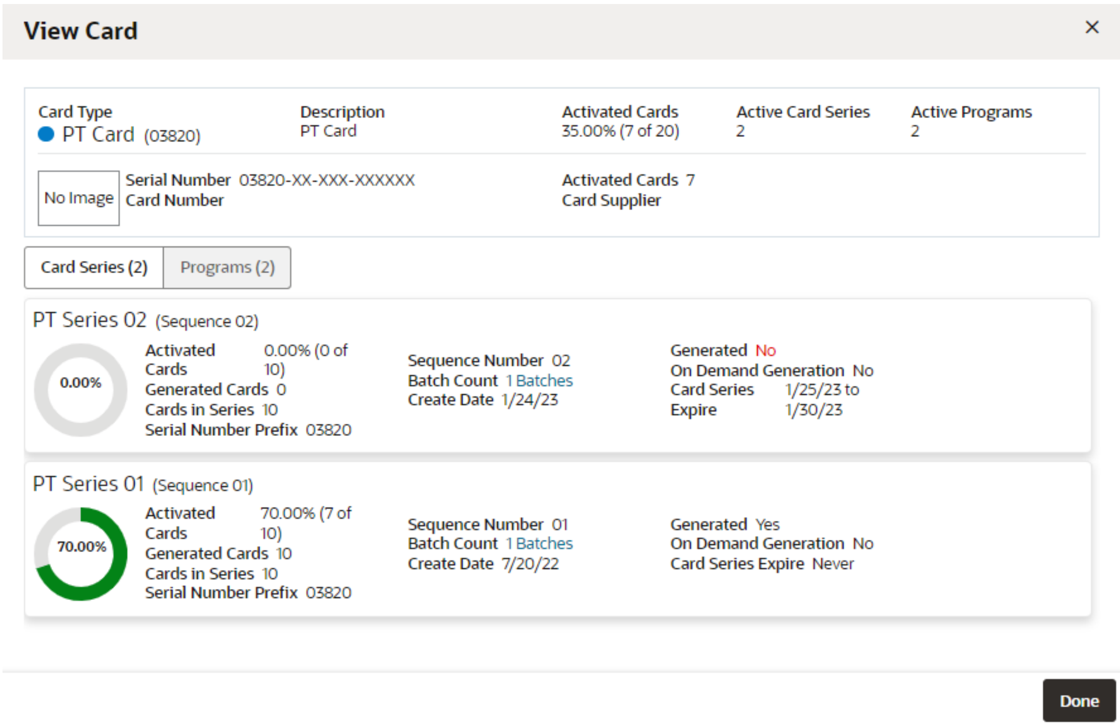
The following options enable you to view Cards already associated with a Program.

- **Program Home** - From the Card column in the Programs Quick Search results area click the Card's name link as shown in Figure 10-62.
- **Program Search** - From the Card column in the Search Results area click the Card's name link as shown in Figure 10-61.

- **Program Scorecard** - From the Program Information panel, click the Card's name link as show in Figure 10-63.

The View Card window opens. You can select to view the Card Series or Programs.

Figure 10-65 View Card - Card Series



View Card - Card Series Actions

The following actions for Card Series are available from the View Card window.

- Edit Card
- Activate Batch
- Change Batch Expiration Date
- Deactivate Card Series Batch
- Generate Card Series

Edit Card

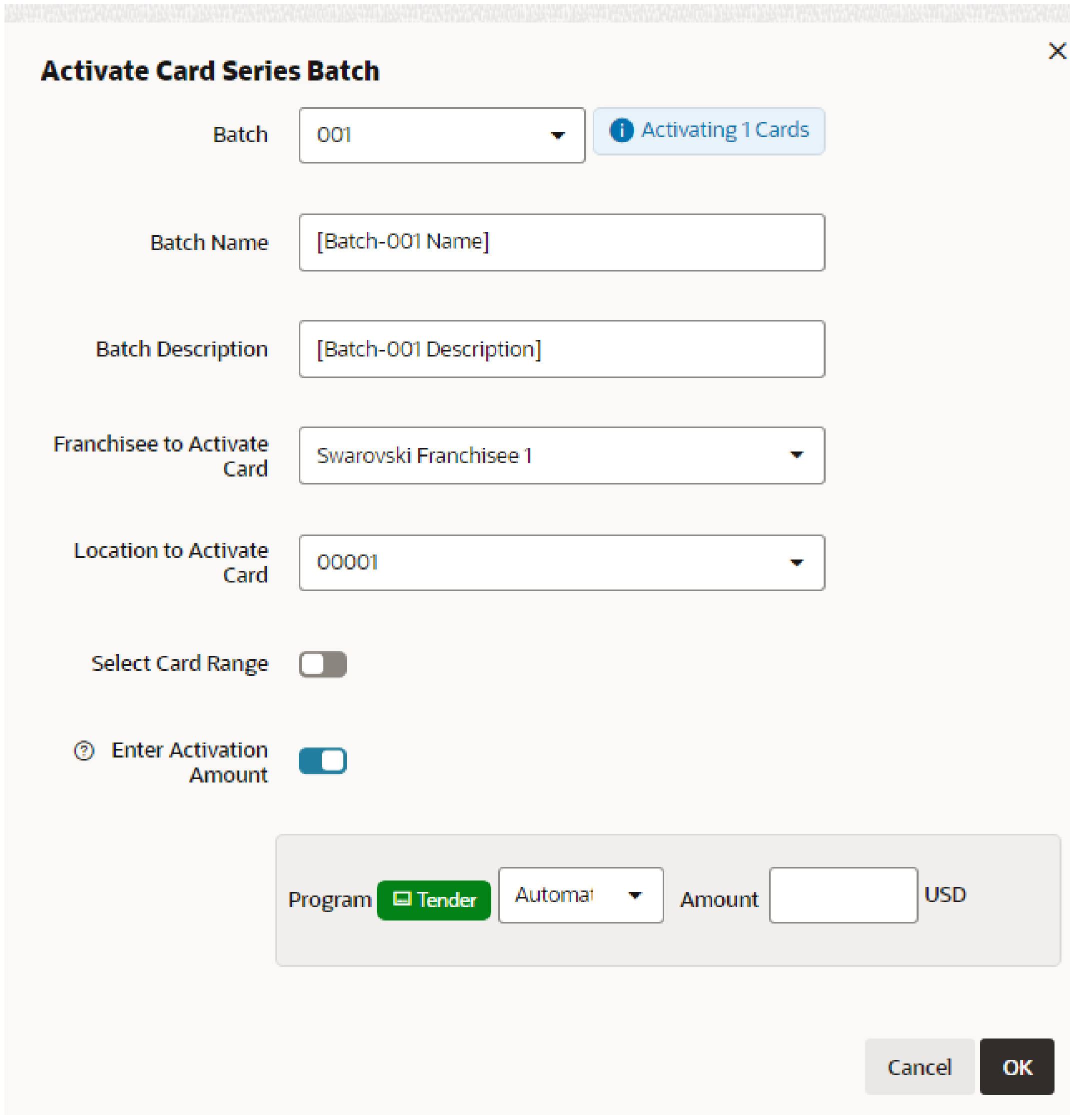
See Editing Cards for details.

> **Note:**
>
> The Activate Batch, Change Batch Expiration Date, Deactivate Card Series Batch will also be made available on the Card Series Tab when the user selects Edit Card.

Activate Batch

- Click the Action Menu and select **Activate Batch**. The Activate Card Series Batch window opens.

Figure 10-66   Activate Card Series Batch



- Enter the following information:
  - **Batch** - Batch Number
  - **Batch Name** - Name of the Batch
  - **Batch Description** - Description of the Batch
  - **Franchisee to Activate Card** - The Franchisee that activated the card.
  - **Location to Activate Card** - The location where the cards are active.
  - **Select Card Range** - Toggle to **On** to enter a specific Card Range.

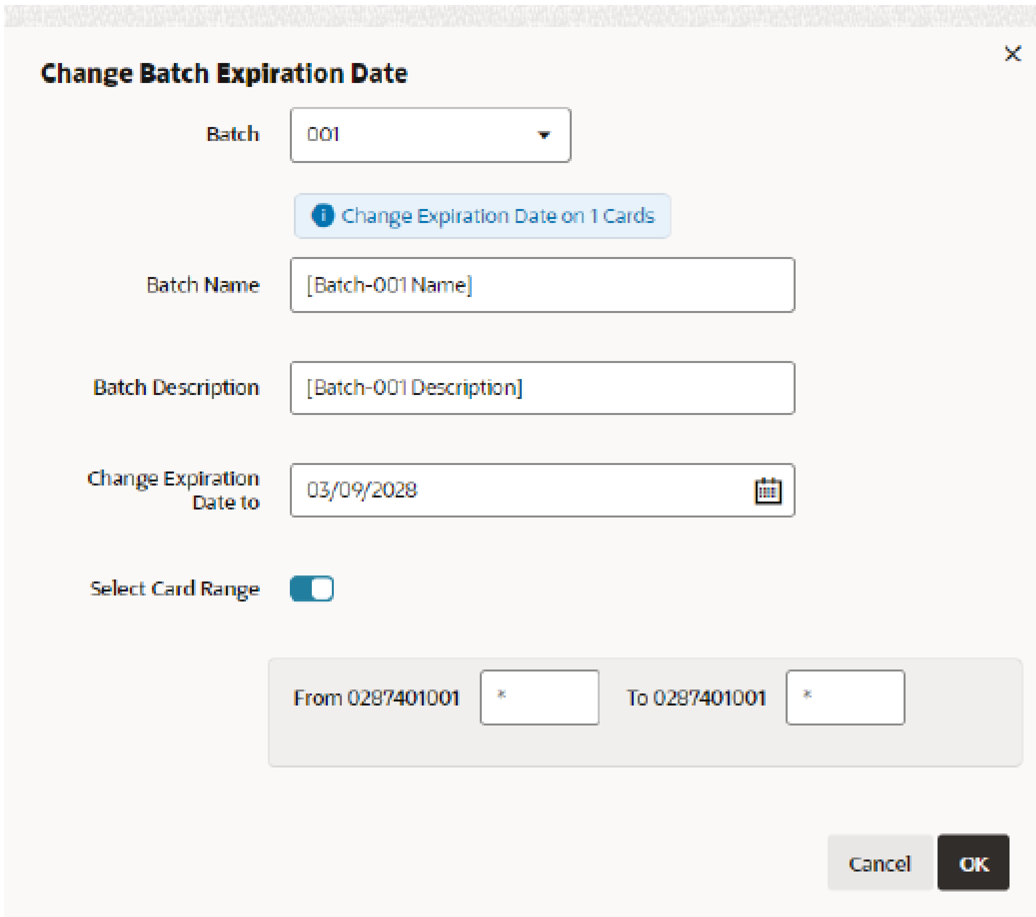
  – **Enter Activation Amount -** When this option is toggled to **On**, the initial amount set up for the program can be overridden when activating the card. If an amount is not selected, the amount defined for the program will be used.

- Either click **OK** to accept the changes and activate the Card Series Batch or click **Cancel** to close the window without saving.

Change Batch Expiration Date

- Click the Action Menu and select **Change Batch Expiration Date**. The Change Batch Expiration Date window opens.

Figure 10-67 Change Batch Expiration Date



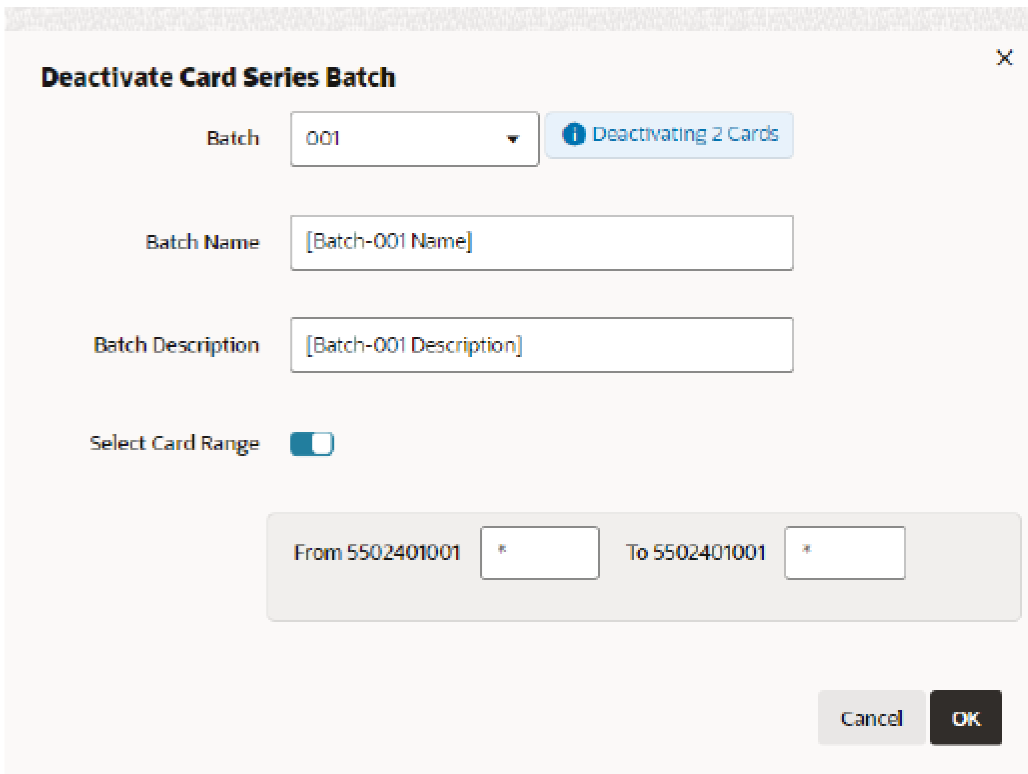
- Enter the following information:
  – **Batch** - Batch Number
  – **Batch Name** - Name of the Batch
  – **Batch Description** - Description of the Batch
  – **Change Expiration Date to -** The new expiration date.
  – **Select Card Range** - Toggle to **On** to enter a specific Card Range.
- Either click **OK** to accept the changes or click **Cancel** to close the window without saving.

> **Note:**
>
> The information box displays the number of cards impacted by the approval of the action.

Deactivate Card Series Batch

- Click the Action Menu and select **Deactivate Batch**. The Deactivate Card Series Batch window opens.

Figure 10-68 Deactivate Card Series Batch



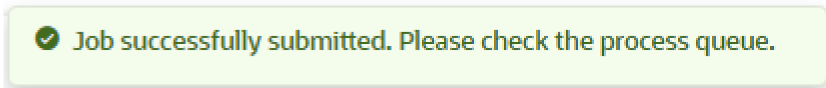
- Enter the following information:
  - **Batch** - Batch Number
  - **Batch Name** - Name of the Batch
  - **Batch Description** - Description of the Batch
  - **Select Card Range** - Toggle to **On** to enter a specific Card Range.
- Either click **OK** to accept the changes and Deactivate the Card Series Batch or click **Cancel** to close the window without saving.

> **Note:**
>
> The information box displays the number of cards impacted by the approval of the action.

Generate Card Series

Click the **Action Menu** and select, **Generate Card Series**. A notification indicates the successful job submission.

Figure 10-69 Job Submission Notification

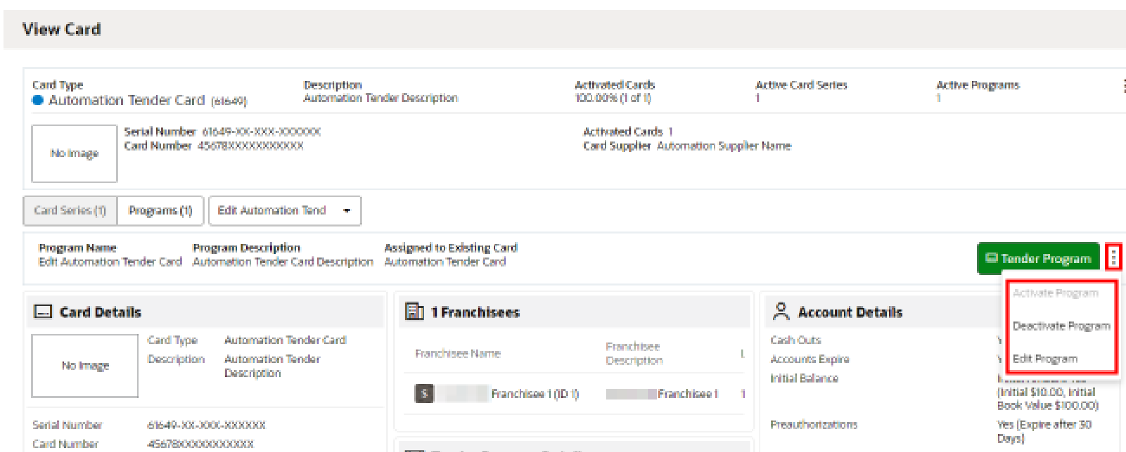


View Card - Programs Actions

The following actions for Card Series are available from the View Card window.

> **Note:**
>
> If more than one Program is associated with a Card, a selection list enables you to select a Program.

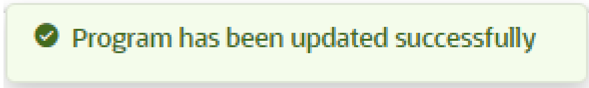
Figure 10-70 View Card – Program Action Menu



- Activate Program - Click the Action Menu icon, then select Activate Program.
- Deactivate Program - Click the Action Menu icon, then select Deactivate Program.

> **Note:**
>
> For Activate and Deactivate Programs a notification appears.

Figure 10-71 Activate/Deactivate Notification



- Edit Program - See Creating a Program for details.

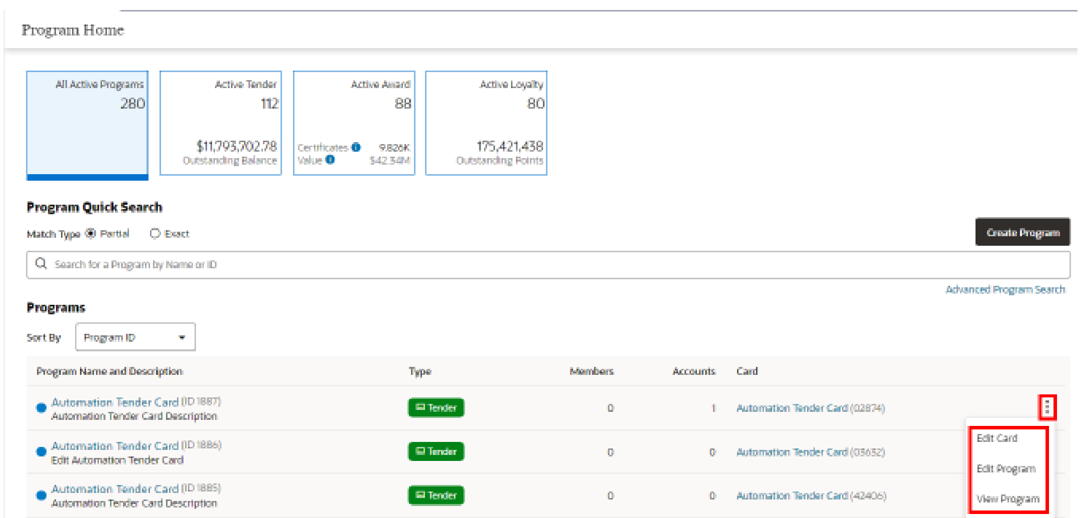
Editing Cards

Once a program has been created, you can edit the card associated with the program. You have the ability to edit certain information in the Franchisees, Card Definition, Card Series and Attributes tab. Once changes are made you can save the edited card.

There are a few places you can find the Edit Card option in order to edit a Card associated with a Program:

- Select **Edit Card** in the Action Menu (also known as the Overflow Menu) icon for each individual Program on the Program Advanced Search window.
- Select **Edit Card** in the Action Menu (also known as the Overflow Menu) icon for each individual Program on the Program Quick Search window.

Figure 10-72 Action Menu - Edit Card



- Select **Edit Card** in the Action Menu (also known as the Overflow Menu) icon in the View Card window.

During the editing process the Franchisees, Card Definition, Card Series and Attributes tabs available for editing. See Creating a Program for more information.

Program Scorecards

The Program Scorecard provides statistical analysis about an individual Tender, Award, or Loyalty Program. The scorecard displays the number of accounts and activity for the program in order to see how much the program is being used, including outstanding balances.

Viewing the Tender Program Scorecard

The Program Scorecard provides a snapshot of how a Tender Program is doing.

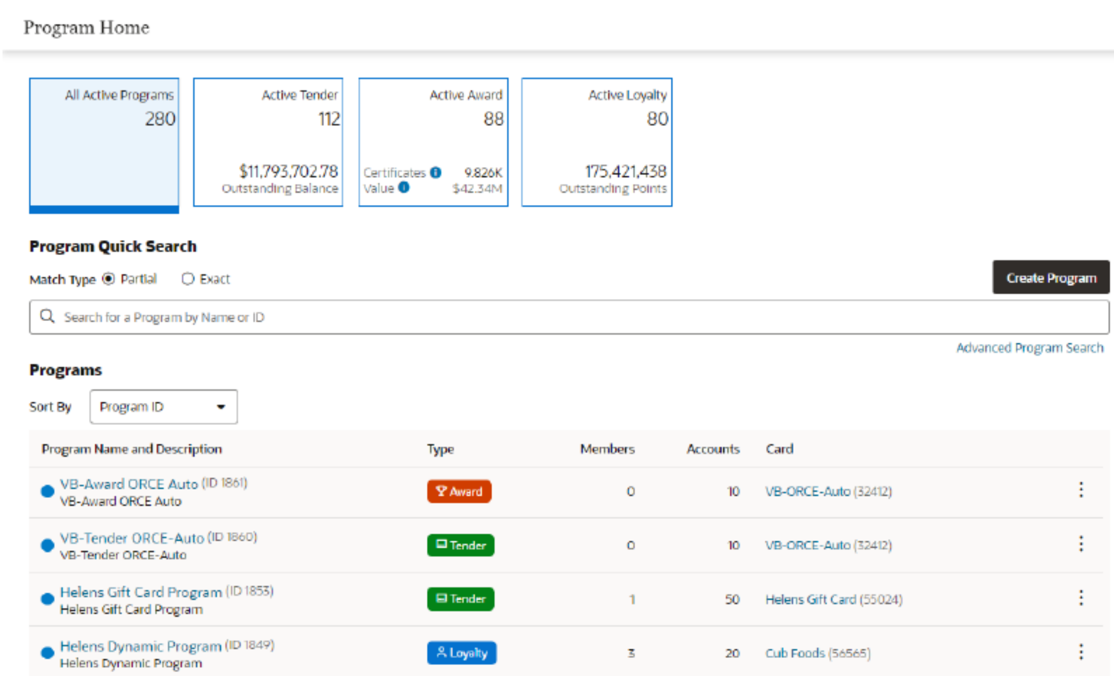
To access the Program Scorecard for analysis on a Tender Program, the user can select the Tender Program name link on either the Programs List or the Programs Advanced Search results windows.

To access the Programs List:

1. From the **Main** menu, click **Tasks**.
2. Click **Program**.
3. Click **Program Home**. This displays the Program Home tab which contains the Program List.

> **Note:**
>
> You will need the Program Home role in order to see this menu option.

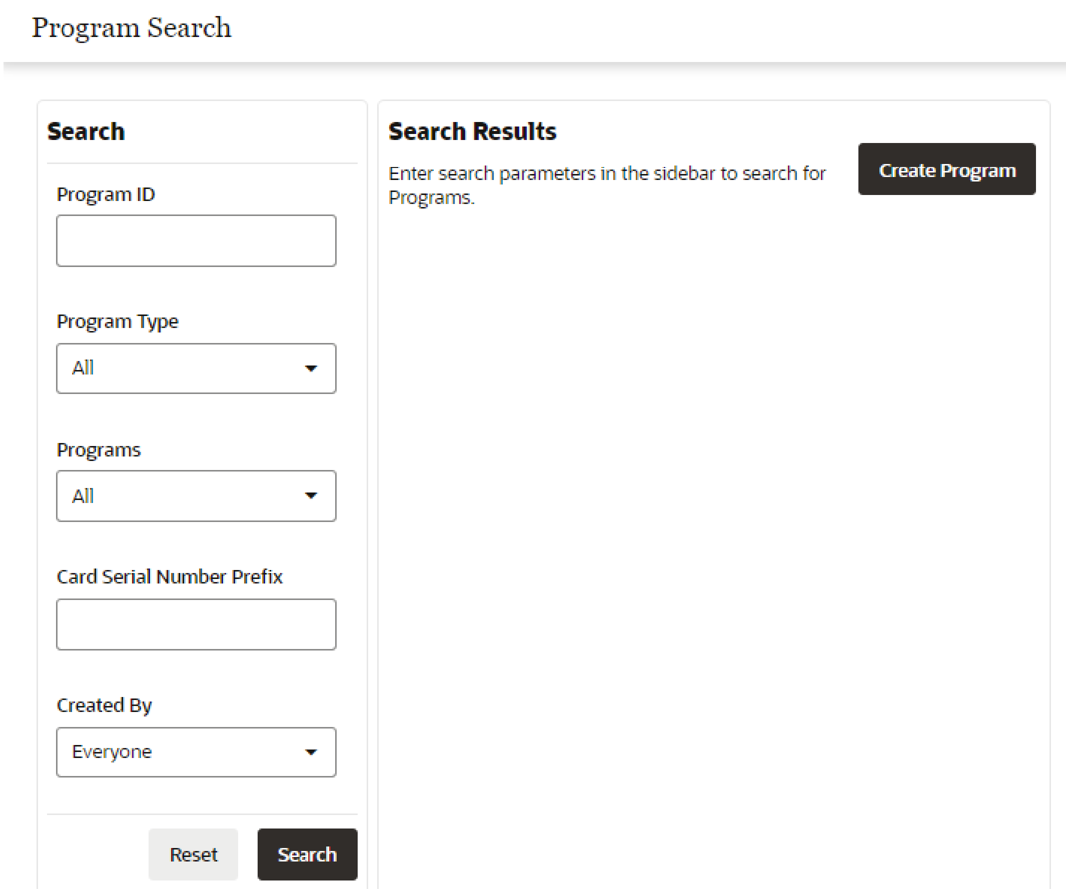
Figure 10-73 Program Home



To access Program Advanced Search:

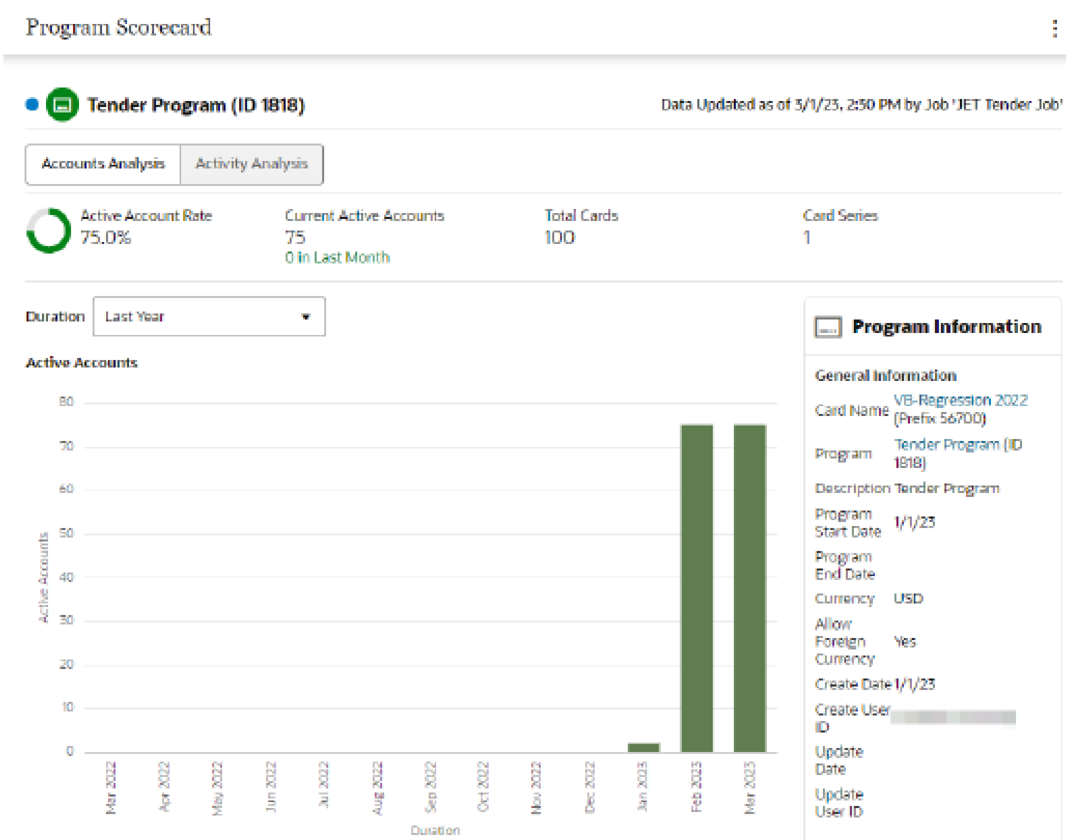
1. From the **Main** menu, click **Tasks**.
2. Click **Program Search**.
3. Enter **criteria** in the Search panel where you can search for a unique program, or click **Search** to retrieve all programs.

Figure 10-74 Advanced Program Search



4. Select the **link** on a **Tender Program Name**, which then opens the Program Scorecard for that Tender Program.

Figure 10-75 Program Scorecard: Tender Program



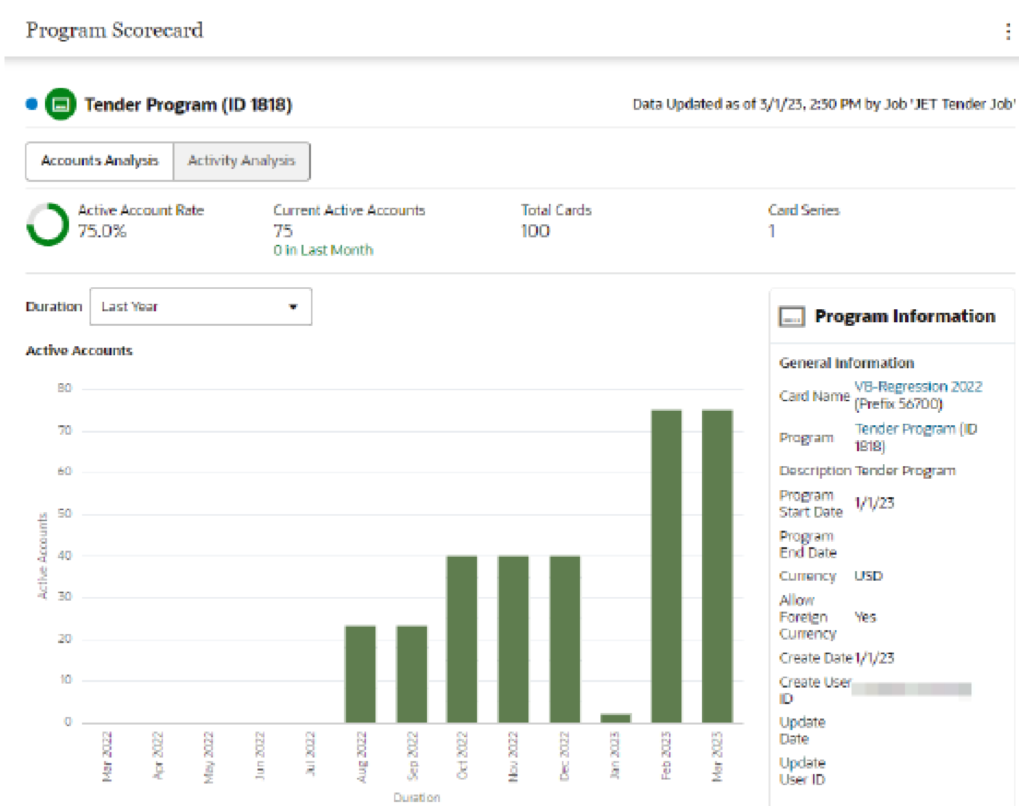
5. The Program Scorecard window displays the following sections:
   - **Title** (displays on all windows) - Displays the Name and ID of the Tender Program as well as an indicator of whether the program is currently active or inactive (a solid Blue Dot represents an Active Program while an Empty Dot represents an Inactive Program).

> **Note:**
>
> When the aggregate job for a Program Scorecard has not yet run for the month, there is no column in the graph for the new month. A message appears to the right of the Name and ID of the Tender Program with the aggregate job identified to let you know why that column is not there, and shows you the job name so you can research the job if several days have gone by and the column is not appearing.

> **Note:**
>
> The Title section also displays a vertical ellipse. Click the vertical ellipse to either Edit or View the Program. See Editing Programs or Viewing Programs for more information.

- **Analysis Toggles** - (chart displays on all windows) The following Analysis toggles are included for the Tender Program Scorecard:
- **Accounts Analysis**
  - Active Account Rate - The percentage of currently Activated Accounts that have been activated out of the total.
  - Current Active Accounts - The total number of accounts currently active for the selected program.
  - Total Cards - Total number of cards in all series.
  - Card Series - Number of card series.
- **Accounts Analysis Chart** - Displays Last Year or Lifetime to Date analysis of the Active Accounts.

Figure 10-76 Accounts Analysis Chart

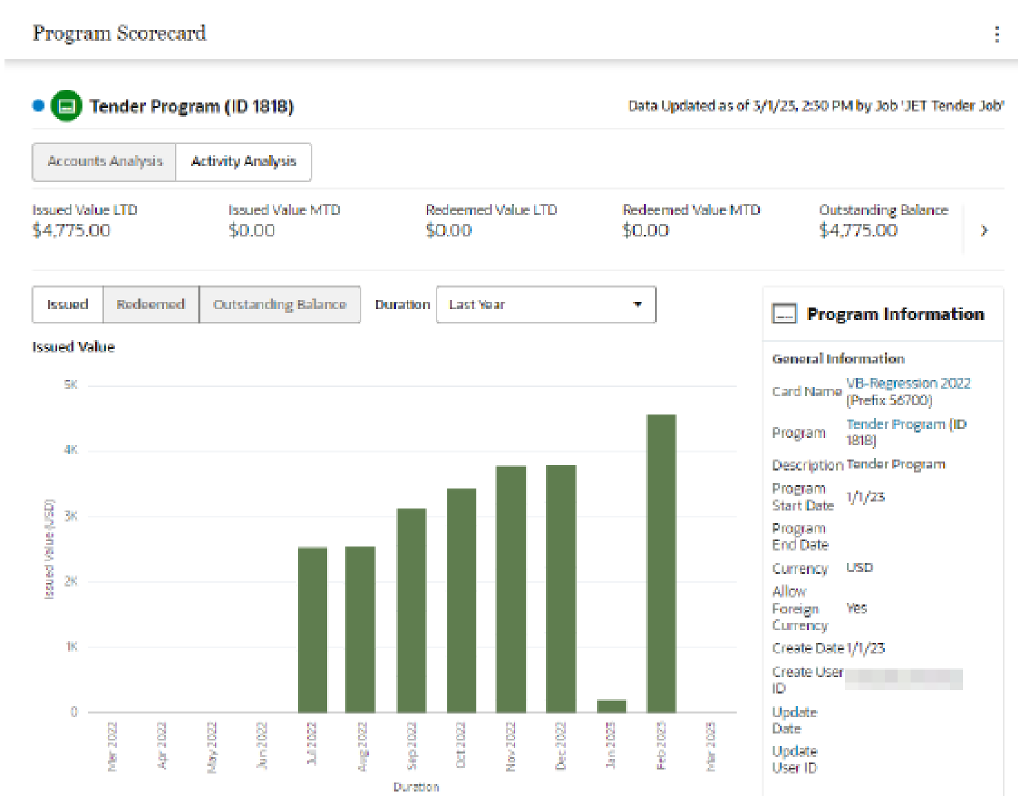


- **Activity Analysis**
  - Issued Value LTD - The total value issued lifetime to date to all active account holders. This includes the activation amount, recharge amount and any amounts returned to the account.
  - Issued Value MTD - The total value issued month to date to all active account holders. This includes the activation amount, recharge amount and any amounts returned to the account.
  - Redeemed Value LTD - The total value redeemed lifetime to date for all active account holders. This includes the cash out amount, post authorize amount, redeemed amount and service charge amount.

- Redeemed Value MTD - The total value redeemed month to date for all active account holders. This includes the cash out amount, post authorize amount, redeemed amount and service charge amount.
- Outstanding Balance - The total value issued that has not yet been redeemed for all active account holders.
- Average Balance Per Account - The average balance held on account for all active account holders. This is calculated by dividing the total outstanding balance divided by the total number of active accounts.

- **Activity Analysis Charts** - Displays Last Year or Lifetime to Date analysis of the Tender.

Figure 10-77 Activity Analysis - Issued

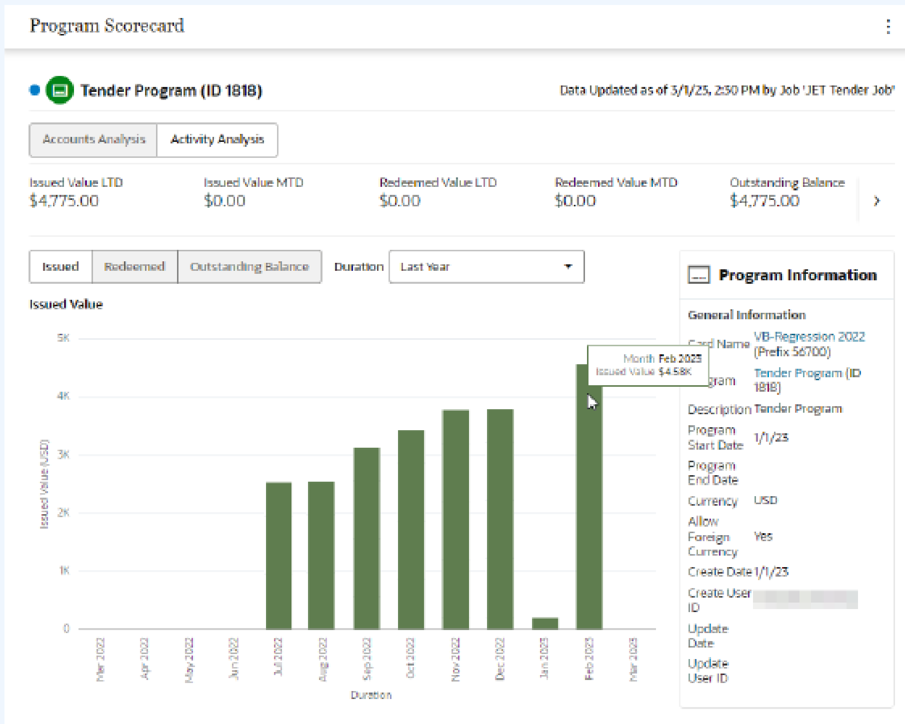


- Issued Value
- Redeemed
- Outstanding Balance

Note:

Hovering the mouse over any bar in the graph displays the information for that bar.

Figure 10-78 Chart Tooltip



- Program Information - (displays on all windows) Lists the General Information including:
  - Card Name - Click the link to open the View Card screen.
  - Program - Click the link to open the View Program screen.
  - Description
  - Program Start Date
  - Program End Date
  - Currency
  - Allow Foreign Currency
  - Create Date
  - Create User ID
  - Update Date
  - Update User ID

6. When finished viewing the Program Scorecard, click the **X** in the Program Title tab to close the window.

Viewing the Loyalty Program Scorecard

The Program Scorecard provides a snapshot of how a Loyalty Program is doing.

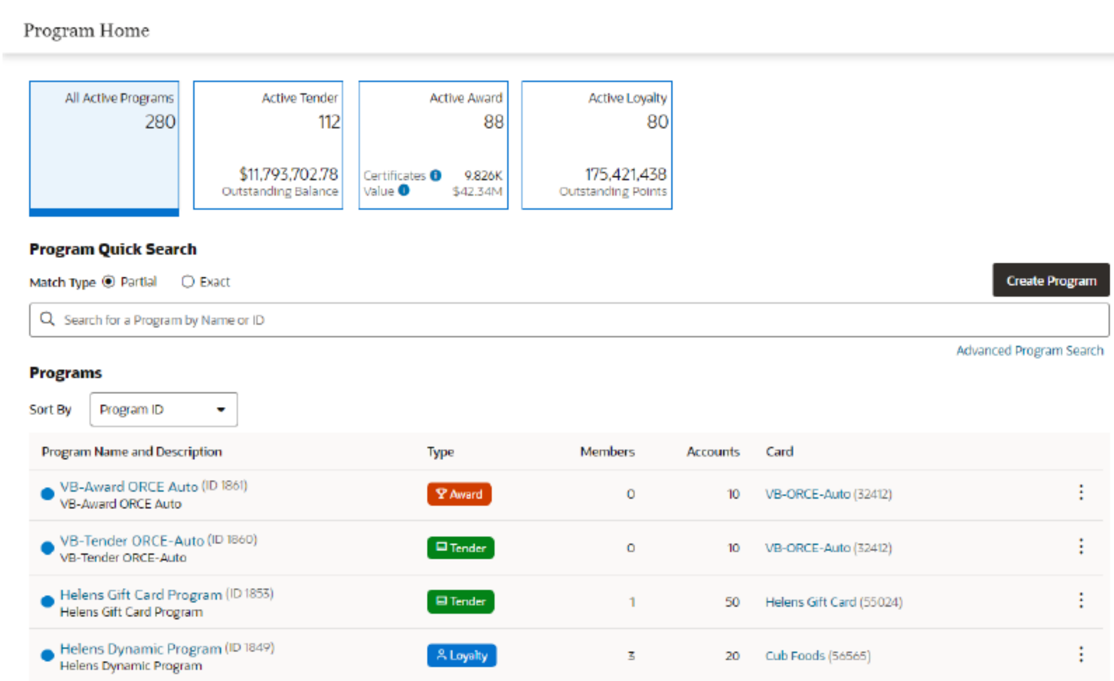
To access the Program Scorecard for analysis on a Loyalty Program, the user can select the Loyalty Program name link on either the Programs List or the Programs Advanced Search results windows.

To access the Programs List:

1. From the **Main** menu, click **Tasks**.
2. Click **Program**.
3. Click **Program Home**. This displays the Program Home tab which contains the Program List.

> **Note:**
>
> You will need the Program Home role in order to see this menu option.

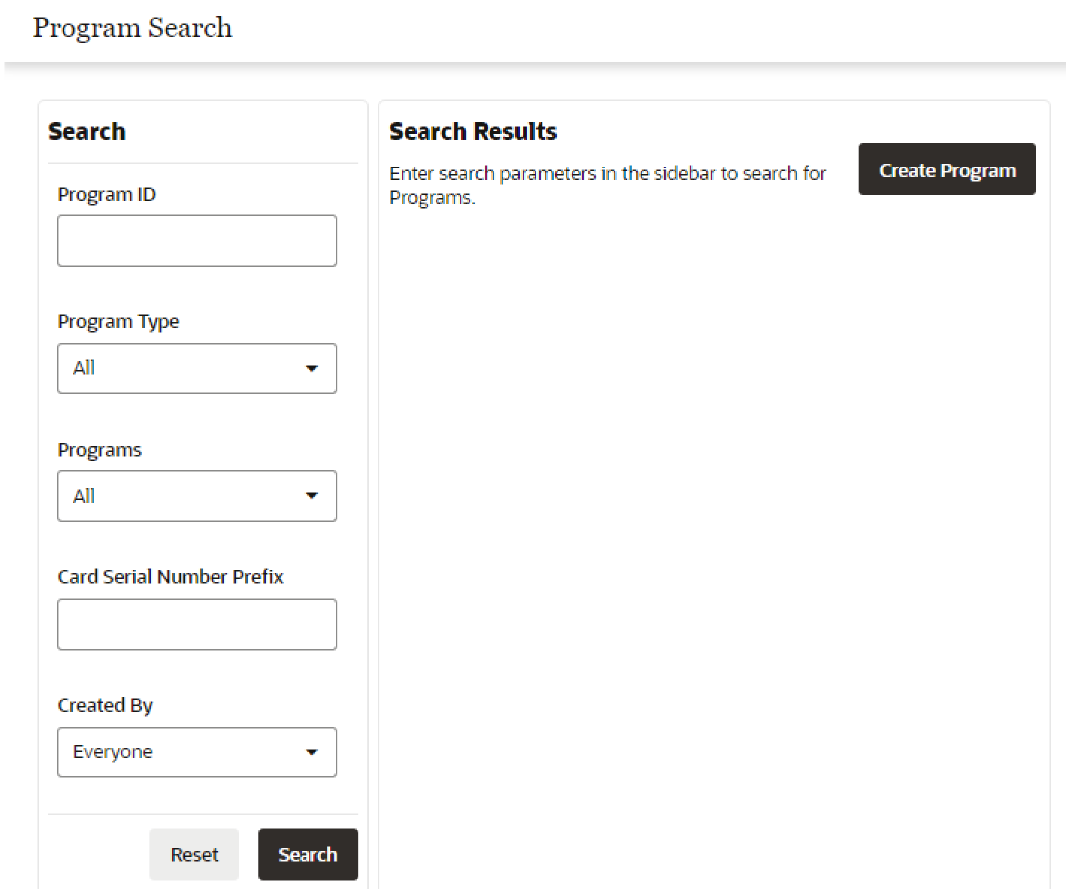
Figure 10-79 Program Home



To access Program Advanced Search:

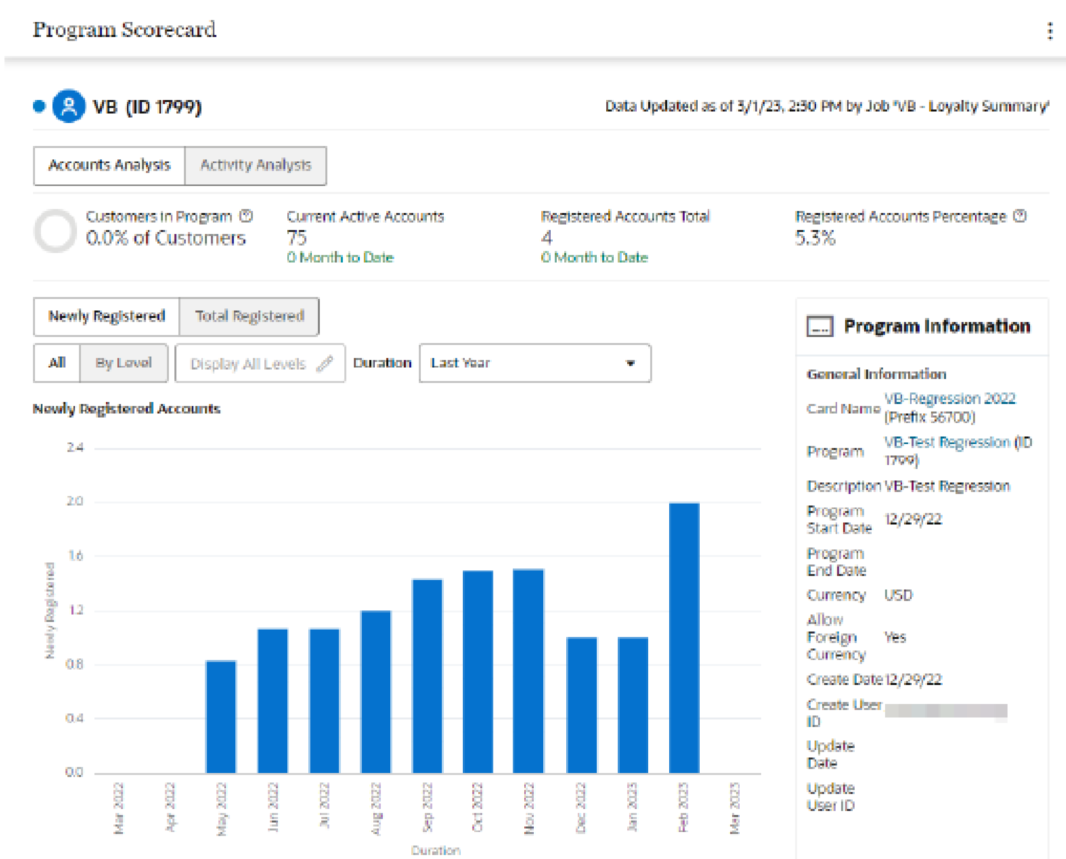
1. From the **Main** menu, click **Tasks**.
2. Click **Program Search**.
3. Enter **criteria** in the Search panel where you can search for a unique promotion, or click **Search** to retrieve all promotions.

Figure 10-80 Advanced Program Search



4. Select the **link** on a **Loyalty Program Name**, which then opens the Program Scorecard for that Loyalty Program.

Figure 10-81 Program Scorecard: Loyalty Program



5. The Program Scorecard window displays the following sections:
   - **Title** (displays on all windows) - Displays the Name and ID of the Loyalty Program as well as an indicator of whether the program is currently active or inactive (a solid Blue Dot represents an Active Program while an Empty Dot represents an Inactive Program).

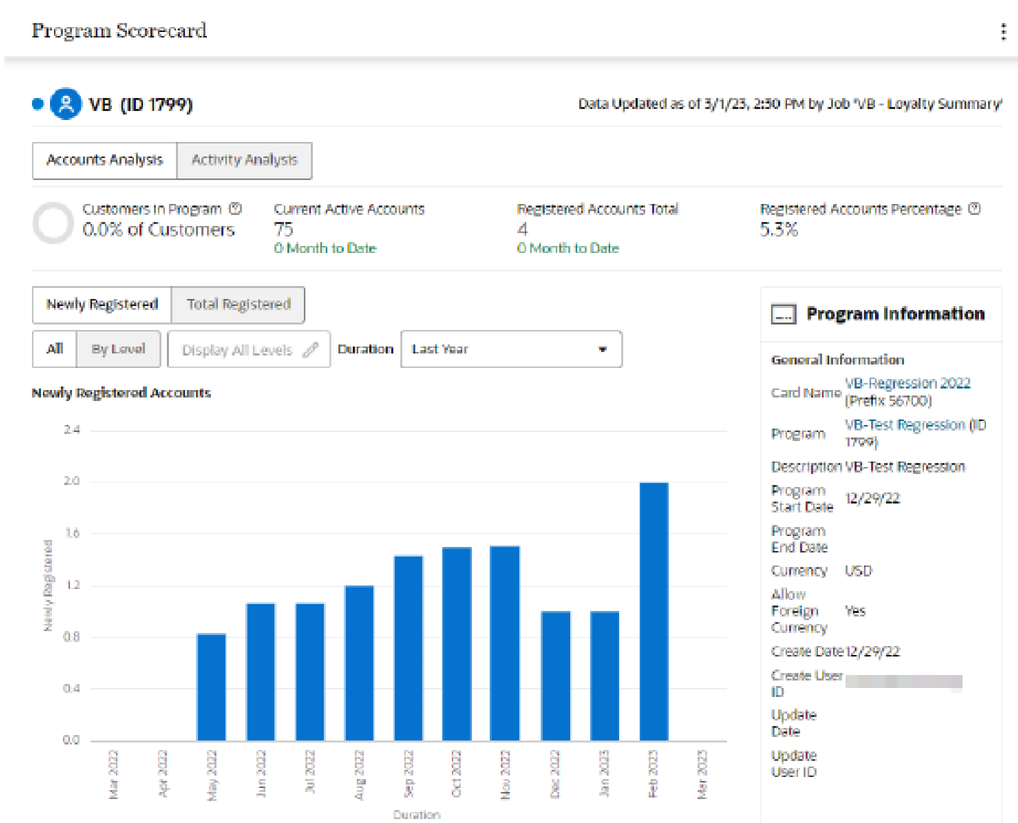
> **Note:**
>
> When the aggregate job for a Program Scorecard has not yet run for the month, there is no column in the graph for the new month. A message appears to the right of the Name and ID of the Loyalty Program with the aggregate job identified to let you know why that column is not there, and shows you the job name so you can research the job if several days have gone by and the column is not appearing.

> **Note:**
>
> The Title section also displays a vertical ellipse. Click the vertical ellipse to either Edit or View the Program. See Editing Programs or Viewing Programs for more information.

Analysis Toggles - (chart displays on all windows) The following Analysis toggles are included for the Loyalty Program Scorecard:

- **Accounts Analysis**
  - Customers in Program - The percentage of customers that are active members of the selected program. This includes both primary and secondary account holders.
  - Current Active Accounts - The total number of accounts currently active for the selected program.
  - Registered Accounts Total - The total number of accounts that are registered to customers and are not anonymous for the program.
  - Registered Accounts Percentage - The percentage of active accounts that are registered to customers compared to all accounts (registered plus anonymous) for the program.
- **Accounts Analysis Chart -** Displays Last Year or Lifetime to Date analysis of the Active Accounts by using the Newly Registered or Total Registered toggles.

Figure 10-82   Accounts Analysis Chart

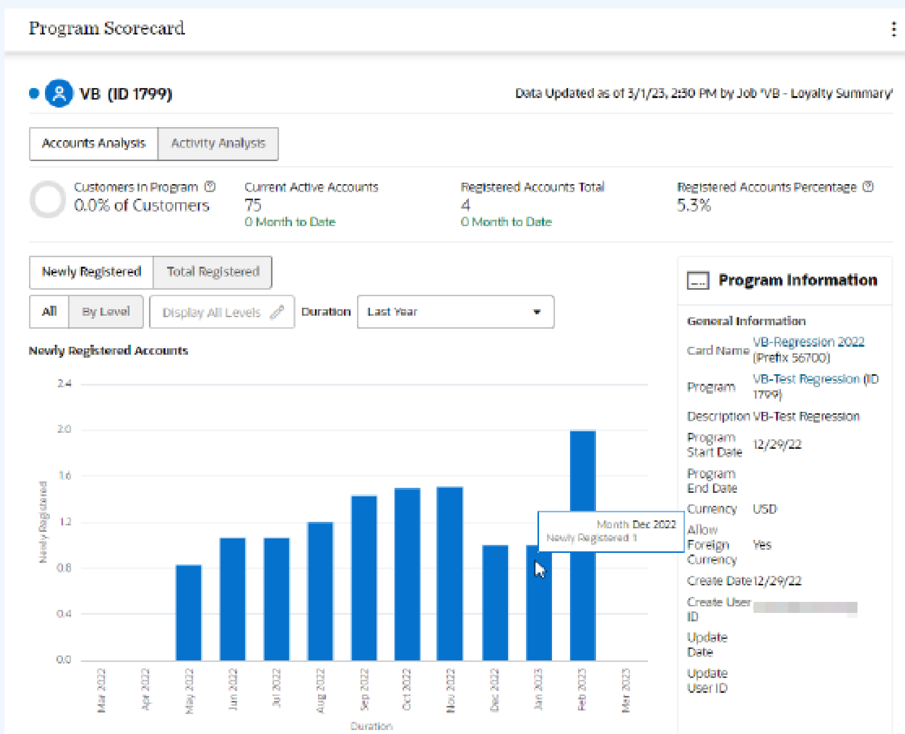


  - Newly Registered
    - All - Displays all levels.
    - By Level - Activates the Display All Levels button as shown in . **Click** to open the Filter Levels to Display window and select the desired levels. Click **OK** to confirm selections.

  * Duration - Used for all Newly Registered options and displays Last Year or Lifetime to Date information.
- Total Registered
  * All - Displays all levels
  * By Level - Activates the Display All Levels button as shown in . **Click** to open the Filter Levels to Display window and select the desired levels. Click **OK** to confirm selections.
  * Duration - Used for all Total Registered options and displays Last Year or Lifetime to Date information

> **Note:**
>
> Hovering the mouse over any bar in the graph displays the information for that bar.

Figure 10-83 Chart Tooltip

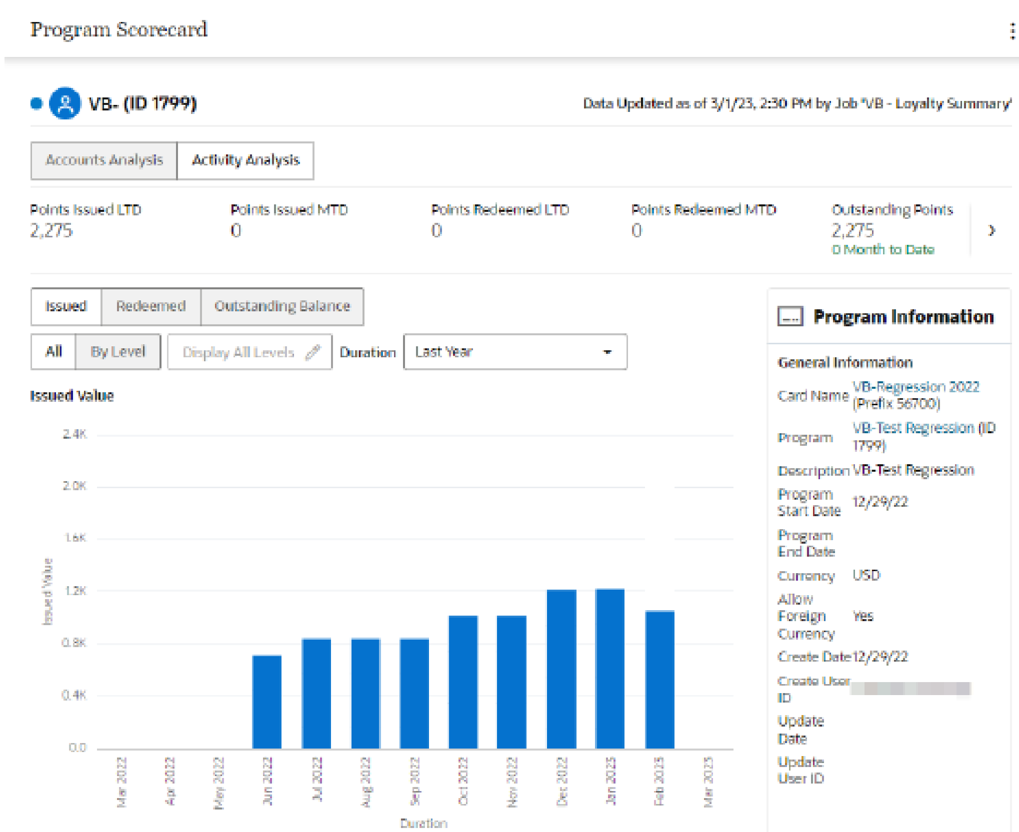


- **Activity Analysis**
  - Points Issued LTD - The total number of lifetime to date points issued to all active account holders. This includes both earned and bonus points. Escrow points are excluded.
  - Points Issued MTD - The total number of month to date points issued to all active account holders. This includes both earned and bonus points. Escrow points are excluded.

- – Points Redeemed LTD - The total number of lifetime to date points redeemed by active account holders for the program.
- – Points Redeemed Month MTD - The total number of month to date points redeemed by active account holders for the program.
- – Outstanding Points - The total number of points issued that have not yet been redeemed. This includes both earned and bonus points. Escrow points are excluded.
- – Average Balance Per Account - The average points balance for all active accounts for the loyalty program. This includes both registered and anonymous account holders. This is calculated by dividing the total earned points balance by the total number of active accounts.

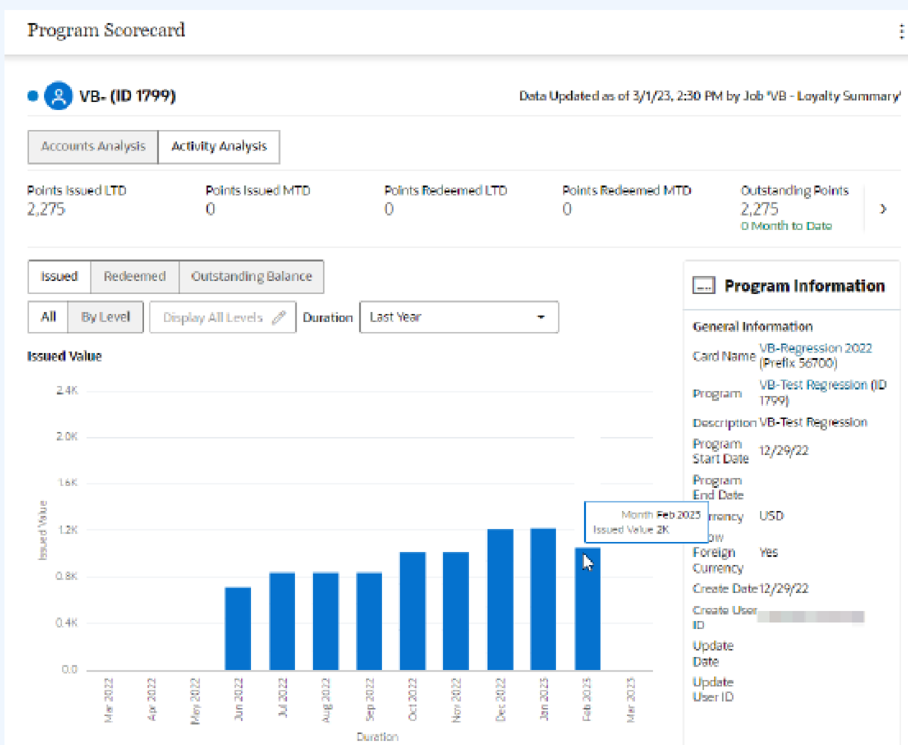
- **Activity Analysis Charts** - Displays Last Year or Lifetime to Date analysis of the points by using the Issued, Redeemed, or Outstanding Balance toggles.

Figure 10-84   Activity Analysis Chart



- – **Issued**
  - * All - Displays all levels
  - * By Level - Activates the Display All Levels button as shown in . **Click** to open the Filter Levels to Display window and select the desired levels. Click **OK** to confirm selections.
  - * Duration - Used for all Issued Value options and displays Last Year or Lifetime to Date information

- **Redeemed**
  - All - Displays all levels
  - By Level - Activates the Display All Levels button as shown in . **Click** to open the Filter Levels to Display window and select the desired levels. Click **OK** to confirm selections.
  - Duration - Used for all Redeemed Value options and displays Last Year or Lifetime to Date information
- **Outstanding Balance**
  - All - Displays all levels
  - By Level - Activates the Display All Levels button as shown in . **Click** to open the Filter Levels to Display window and select the desired levels. Click **OK** to confirm selections.
  - Duration - Used for all Outstanding E-Award Balance options and displays Last Year or Lifetime to Date information

> **Note:**
>
> Hovering the mouse over any bar in the graph displays the information for that bar.
>
> **Figure 10-85 Chart Tooltip**
>
> 
>

- Accounts Summary - (displays on all windows) Summarized the following information:

  - Loyalty Program Levels - Lists the Loyalty Program Total and then lists each level created within that Loyalty Program
  - Percent of Program - The percentage of all active accounts in the loyalty program level compared to the entire program. This includes both registered and anonymous account holders.
  - Points Issued - The total number of lifetime to date points issued to all active account holders for the loyalty level. This includes both earned and bonus points. Escrow points are excluded.
  - Points Redeemed - The total number of lifetime to date points redeemed by active account holders for the loyalty level.
  - Members Who Received Points - The total number of unique customer ID's associated with a points issue transaction for the loyalty program level. This includes both primary and secondary account holders.
  - Average Points Balance - The average points balance for all active accounts for the loyalty program level. This includes both registered and anonymous account holders. This is calculated by dividing the total earned points balance by the total number of active accounts.
- Program Information - (displays on all windows) Lists the General Information including:
  - Card Name - Click the link to open the View Card screen.
  - Program - Click the link to open the View Program screen.
  - Description
  - Program Start Date
  - Program End Date
  - Currency
  - Allow Foreign Currency
  - Create Date
  - Create User ID
  - Update Date
  - Update User ID

6. When finished viewing the Program Scorecard, click the **X** in the Program Title tab to close the window.

Viewing the Award Program Scorecard

The Program Scorecard provides a snapshot of how an Award Program is doing.

To access the Program Scorecard for analysis on an Award Program, the user can select the Award Program name link on either the Programs List or the Programs Advanced Search results windows.

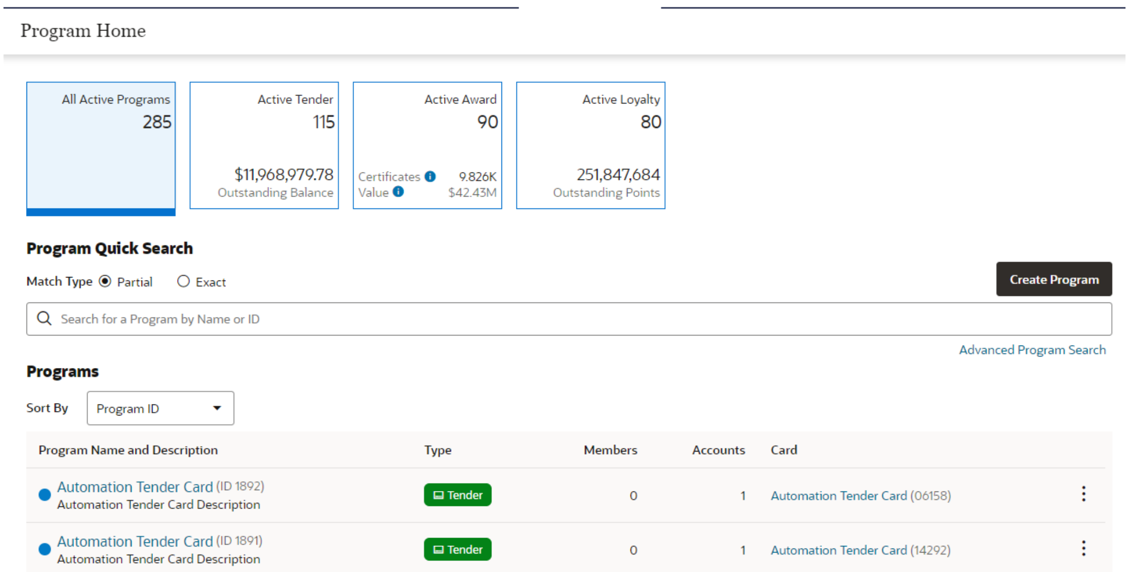
To access the Programs List:

1. From the **Main** menu, click **Tasks**.
2. Click **Program**.

3. Click **Program Home**. This displays the Program Home tab which contains the Program List.

> **Note:**
>
> You will need the Program Home role in order to see this menu option.

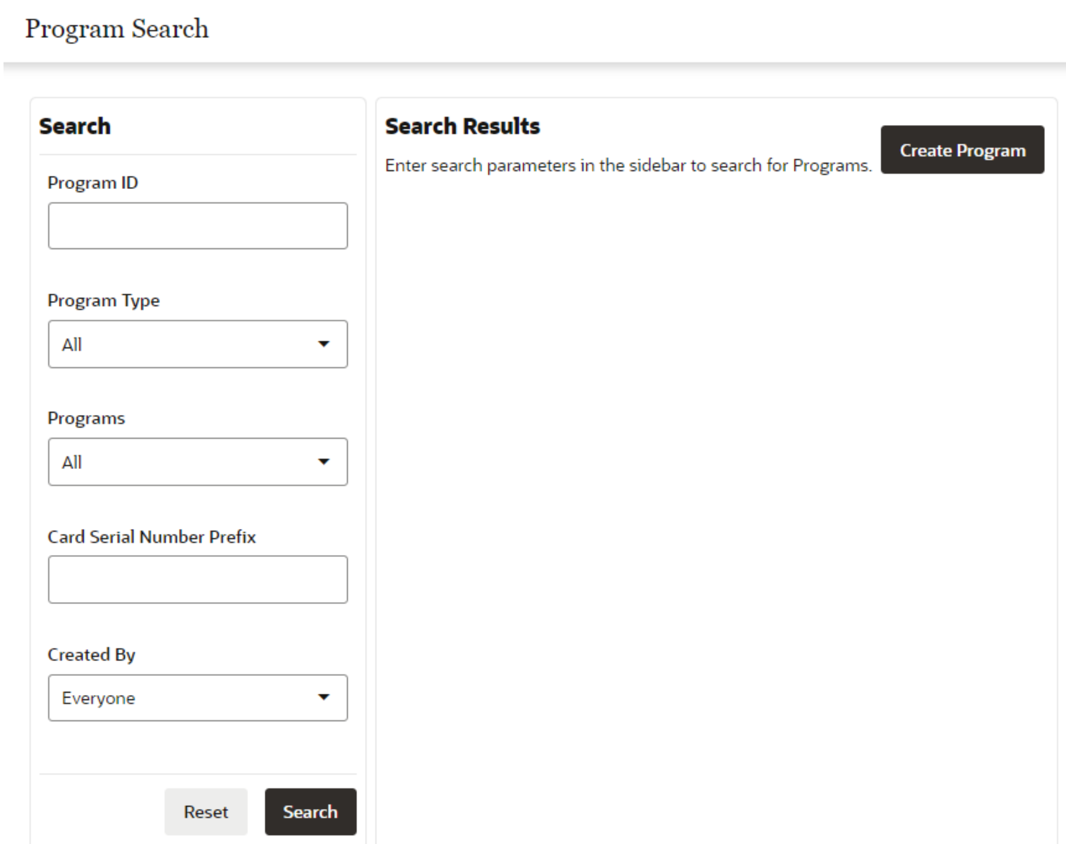
Figure 10-86 Program Home



To access Program Advanced Search:

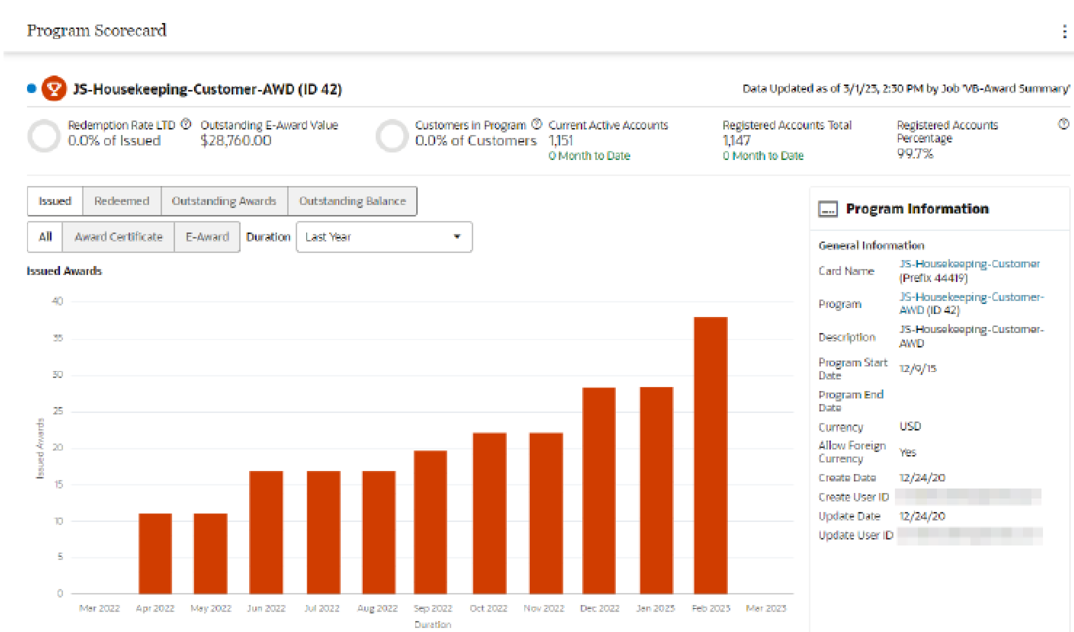
1. From the **Main** menu, click **Tasks**.
2. Click **Program Search**.
3. Enter **criteria** in the Search panel where you can search for a unique promotion, or click **Search** to retrieve all promotions.

Figure 10-87 Advanced Program Search



4. Select the **link** on an **Award Program Name**, which then opens the Program Scorecard for that Award Program.

Figure 10-88 Program Scorecard: Award Program



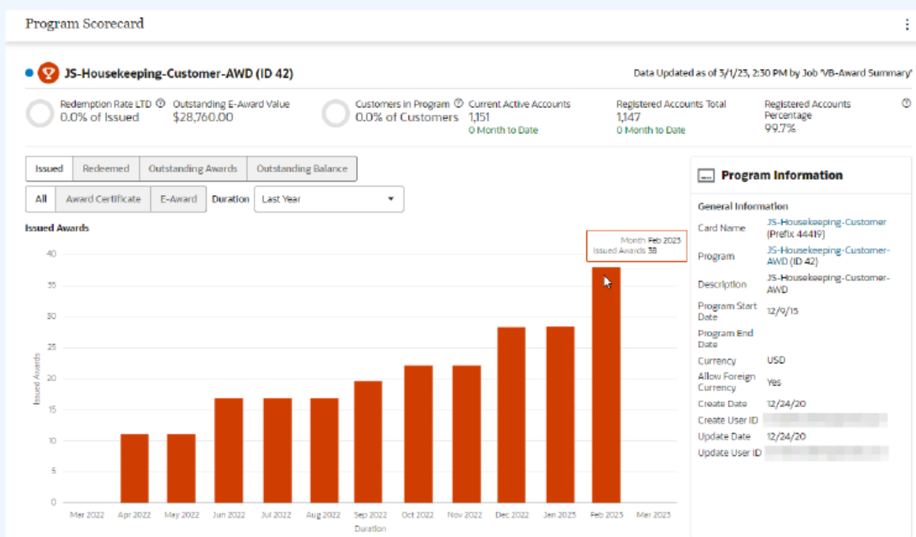
5. The Program Scorecard window displays the following sections:
   - **Title** (displays on all windows) - Displays the Name and ID of the Award Program as well as an indicator of whether the program is currently active or inactive (a solid Blue Dot represents an Active Program while an Empty Dot represents an Inactive Program).

     > **Note:**
     >
     > When the aggregate job for a Program Scorecard has not yet run for the month, there is no column in the graph for the new month. A message appears to the right of the Name and ID of the Award Program with the aggregate job identified to let you know why that column is not there, and shows you the job name so you can research the job if several days have gone by and the column is not appearing.

     > **Note:**
     >
     > The Title section also displays a vertical ellipse. Click the vertical ellipse to either Edit or View the Program. See Editing Programs or Viewing Programs for more information.

   - **Metrics** (displays on all windows)
     – Redemption Rate LTD - The percentage of lifetime to date awards redeemed from those that have been issued.
     – Outstanding E-Award Value - The total value of e-awards available for redemption.
     – Customers in Program - The percentage of customers that are active members of the selected program out of all customers. This includes both primary and secondary account holders.
     – Current Active Accounts - The total number of active accounts. This includes registered and anonymous accounts.
     – Registered Accounts Total - The total number of accounts that are registered to customers and are not anonymous for the program.
     – Registered Accounts Percentage - The percentage of active accounts that are registered to customers compared to all accounts (registered plus anonymous) for the program.
   - **Award Analysis Graphs**
     – Issued
       * All - Plots all Issued Awards
       * Award Certificate - Plots only Issued Award Certificates
       * E-Award - Plots only Issued E-Awards
       * Duration - Used for all Issued Award options and displays Last Year or Lifetime to Date information
     – Redeemed
       * All - Plots all Redeemed Awards

    - * Award Certificate - Plots only Redeemed Award Certificates
    - * E-Award - Plots only Redeemed E-Awards
    - * Duration - Used for all Redeemed Award options and displays Last Year or Lifetime to Date information
  - – Outstanding Awards
    - * All - Plots all Outstanding Awards
    - * Award Certificate - Plots only Outstanding Award Certificates
    - * E-Award - Plots only Outstanding E-Awards
    - * Duration - Used for all Outstanding Award options and displays Last Year or Lifetime to Date information
  - – Outstanding Balance - Graphs the outstanding E-Award balances by Last Year or Lifetime to Date durations

> **Note:**
>
> Hovering the mouse over any bar in the graph displays the information for that bar.
>
> **Figure 10-89   Chart Tooltip**
>
> 
>

- **Program Information** - (displays on all windows) Lists the General Information including:
  - – Card Name - Click the link to open the View Card screen.
  - – Program - Click the link to open the View Program screen.
  - – Description
  - – Program Start Date
  - – Program End Date

- Currency
- Allow Foreign Currency
- Create Date
- Create User ID
- Update Date
- Update User ID

6. When finished viewing the Program Scorecard, click the **X** in the Program Title tab to close the window.

11
Card Administration

The Card Administration page provides Users with access to Cards issued to Customers, and the Accounts associated with those Cards. Users can then view information about that Card or Account, or make any necessary changes to that Card or Account.You can use this page to work with Tender Accounts, Award Accounts, and Loyalty Accounts.

Overview

This chapter contains the following:

- Overview
- Card Search
- Card and Account Details
  - Basic Card Information
- Actions Menu
  - Activate Card
  - Add Account
  - Card Attributes
  - Deactivate Card
  - Merge Card
  - Reset Card Expiration Date
  - Unblock Card
  - View Card Details
- Tender Account
- Award Account
- Loyalty Account

Card Search

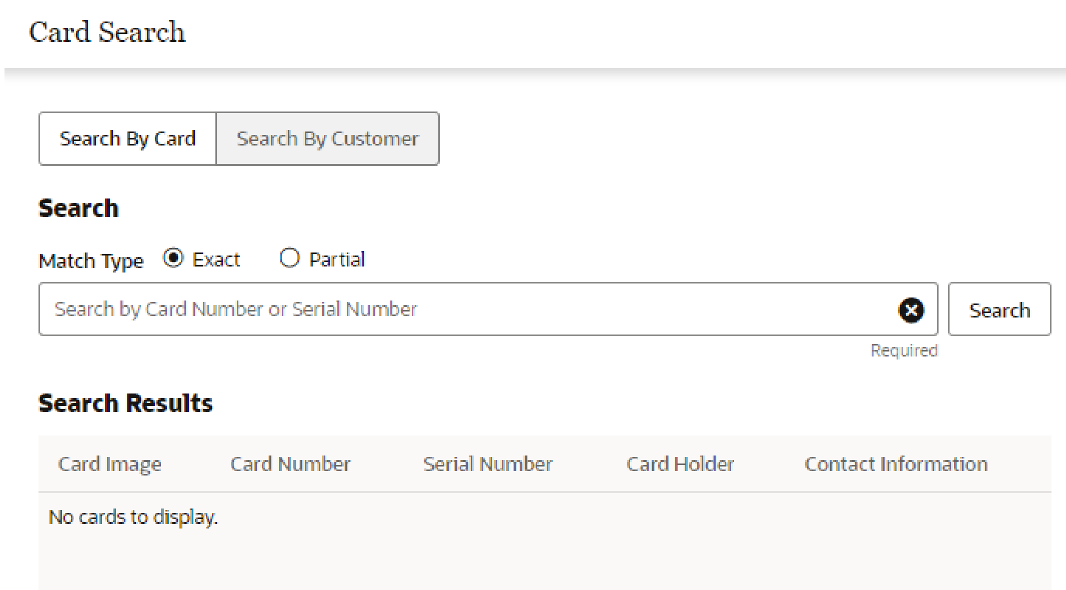
The Card Search page uses Card-specific or Account-specific information to locate a Card to open in Card Administration.

To perform a Card search:

1. Either select Task>Program>Card Search or select the Card Search icon on the Menu Bar.

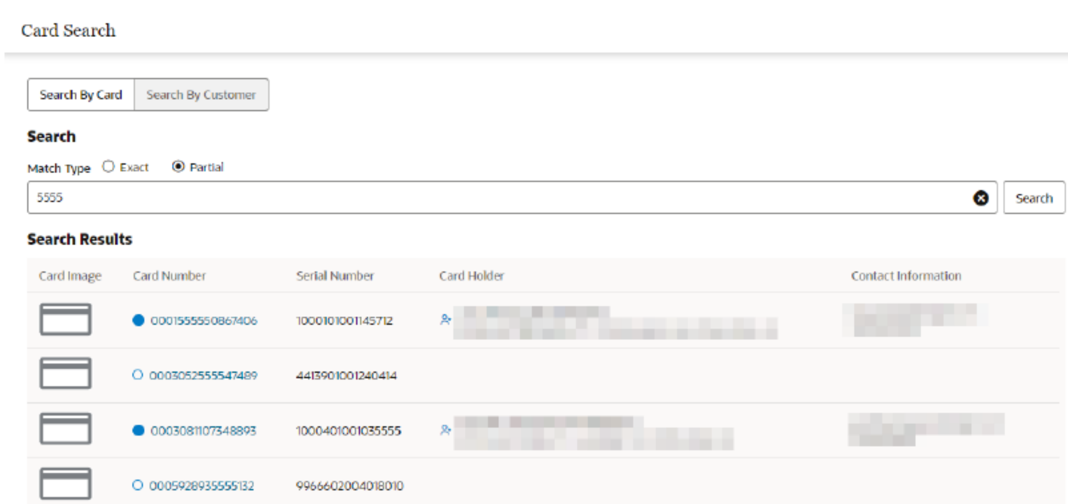
   The Card Search page opens.

Figure 11-1 Card Search



2. In the Search for Card field, enter the **Card Number** or **Serial Number** of the Card you want to search for. Click **Partial** to search for Cards that partially match the search text, or click **Exact**, to search for an exact match.
   - Card Number - Card Number for the Card.
   - Serial Number - Serial Number for the Card.
   - Account Number - Account Number for an Account associated with a Card.
3. Click the **Search** button, or press **Enter**. The Search Results window appears,.

Figure 11-2 Search Results



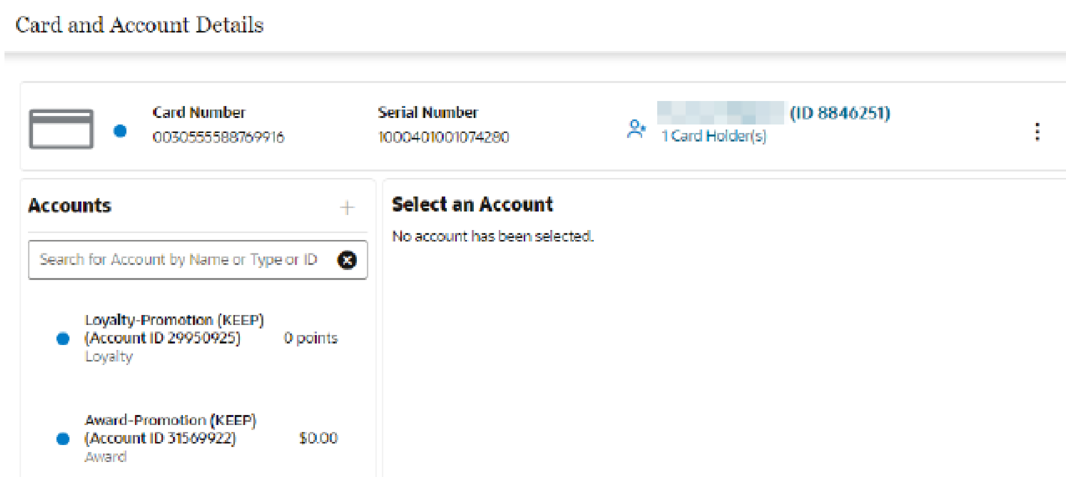
- The search results display the following fields:
- Card Image
- Card Number

- Serial Number
- Card Holder
- Contact Information
- If no Card is found matching the entered criteria, an error message displays.

4. Hover over any of the icons in the **Card Number** column (as shown in Figure 11-2) to see a tooltip listing the status of the Program.
    - **Active** - Filled
    - **Inactive** - Empty
5. Click the **Card Number** which appears as a link to view the details. The Card and Account Details window appears.

> **Note:**
>
> You can also arrive at this screen by clicking on the card number in the Customer Dashboard screen. See Cards and Programs for more information.

Figure 11-3 Card and Account Details



See Card and Account Details for more information.

Card and Account Details

The Card and Account Details page displays information about individual Cards and provides access to functions that can be performed on the Card and its associated Accounts, including:

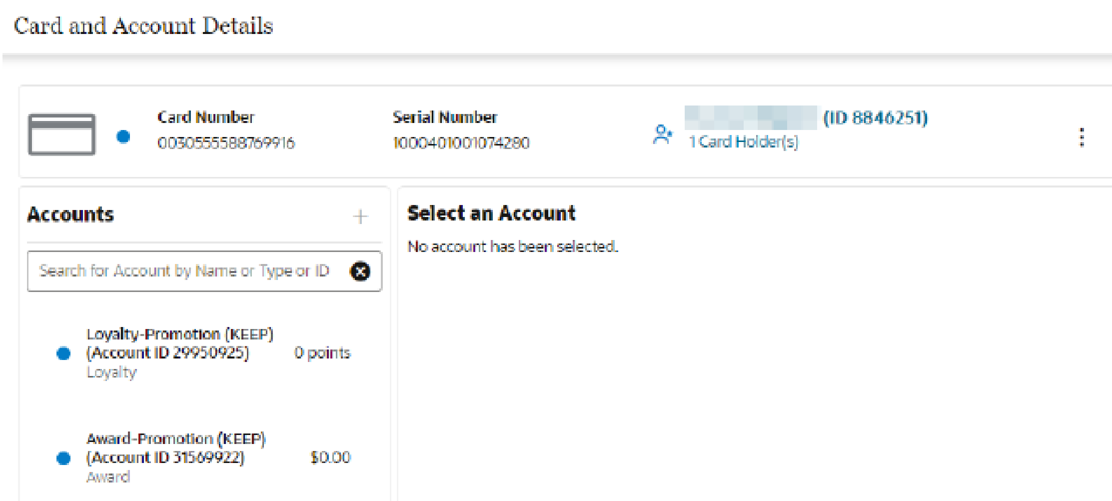
- Activate Card
- Add Account
- Card Attributes
- Deactivate Card
- Merge Card

- Reset Card Expiration Date
- Unblock Card
- View Card Details

Basic Card Information

The upper portion of the Card Administration page displays basic information about the Card and the Accounts associated with the Card. This information is always displayed in Card Administration.

Figure 11-4 Basic Card Information



This area displays the following information:

- Card Information - Basic information about the Card. This includes the following information:
  - Card Number - Card Number for the Card.
  - Serial Number - Serial Number for the Card.
  - Primary holder - Name of Customer designated as the primary holder of the Card. Click the name to open Customer Record of the primary holder in the Customer Dashboard.
  - Card Status - Current status of the Card.
  - Card Holders - Total number of Customers assigned to this Card. This includes a link that will display all cardholders in a mini popup and will allow the user to click on a name which will open the customer dashboard for the selected customer.
- Accounts Panel - Displays the Accounts associated with the Card.
  - Account Name - Name of the Account.
  - Account Number - Account Number for the Account.
  - Account Type - Type of Account (Tender, Award, or Loyalty).
  - Value

    Tender - Current balance in the tender account.

Award - Current E-Award balance for Award Accounts.

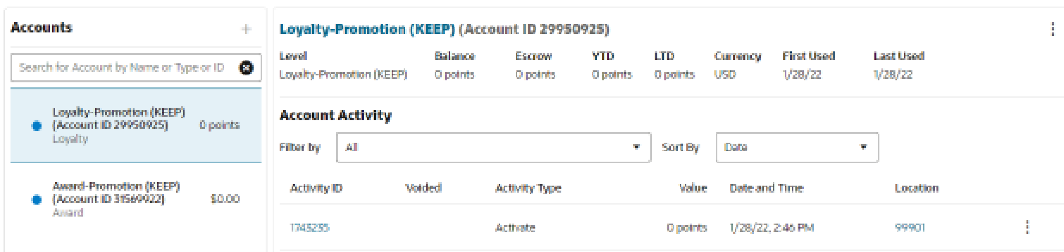
Loyalty - Current Points balance for Loyalty Accounts

–

–

- Select an Account Panel - This section lists the accounts associated with the Card. Select an **Account** listed in the Accounts Panel to populate the Account Details and Activity.

Figure 11-5 Account Details and Activity



The fields are based on the type of program selected.

- Filter By - Options are based on the type of program selected.
- Sort By - Options are based on the type of program selected.
- Account Activity List
  - Activity ID - The ID of the Activity. Click the **Activity ID** to see the Activity Details. Click **Done** to close the Activity Details and return to the Activity List.
  - Voided - Indicates whether or not the activity was voided.
  - Activity Type - Type of activity performed.
  - Value

    Tender - Displays the activity amount.

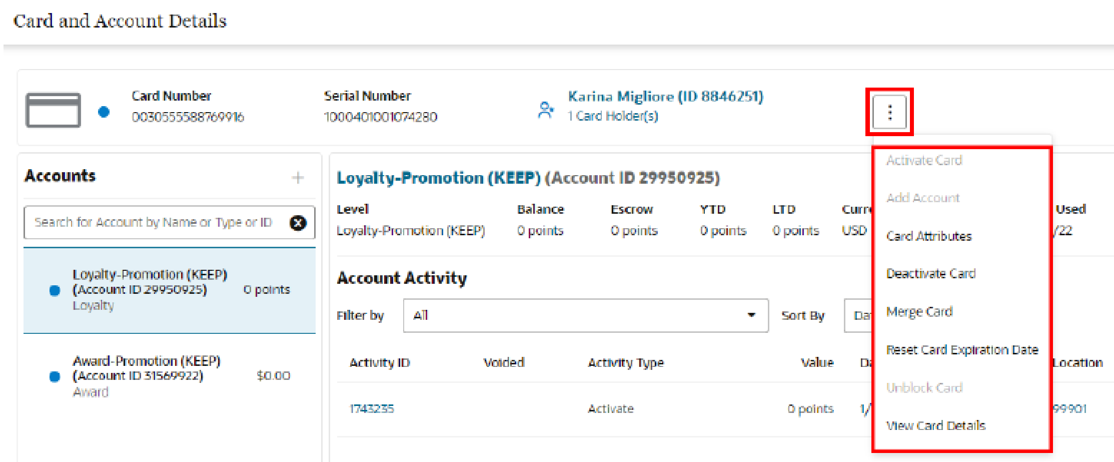
    Award - Displays the e-award value or the entitlement offer name. A link will display for an entitlement offer that will open the View Offer screen.

    Loyalty - Displays the points associated with the activity.
  - Date and Time - Date and Time of the activity.
  - Location - Location where the activity occurred. Click on the Location ID to view details.
  - Coupon ID - The ID of the Coupon (visible for Award Program only).

Actions Menu

The Actions Menu for the Card Administration page (without selecting a specific Account, such as an Award Account) has the following options:

Figure 11-6 Card Actions Menu



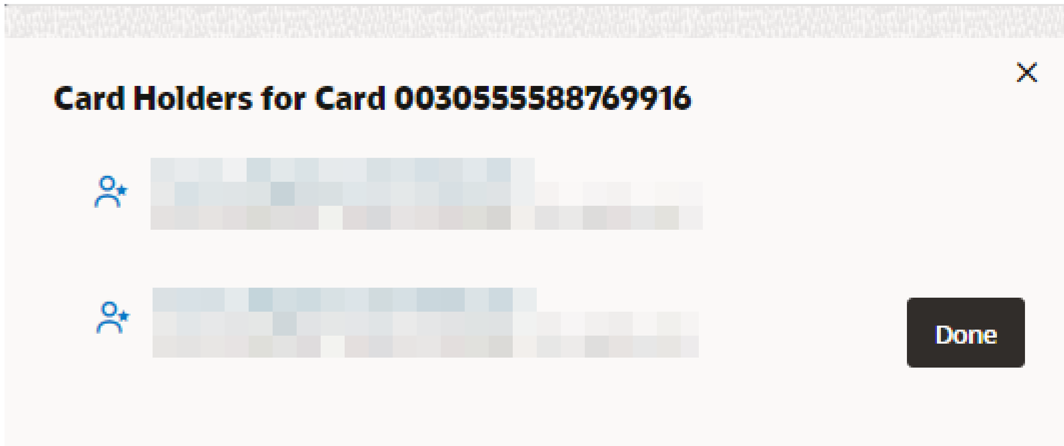
- Activate Card - Activate an inactive Card (only shown for inactive Cards). See Activate Card.
- Add Account - Add a Loyalty Account to the Card. This option is available only if there is a Loyalty Account that has not been applied to the Card, when the Card was generated for a Program that has the Dynamically Create Accounts option selected. Also, the DynamicProgramAccountAdmin role controls access to this option. See Add Account.
- Card Attributes - The details of the card attributes. See Card Attributes.
- Deactivate Card - Deactivate an active Card (only shown for active Cards). See Deactivate Card.
- Merge Card - Merge the Card with another Card. See Merge Card.
- Reset Card Expiration Date - Set a new expiration date for the Card. See Reset Card Expiration Date.
- Unblock Card - Enables you to unblock a card that has been blocked from deactivating or merging a card with a tender account. See Unblock Card.
- View Card Details - Displays the details for the selected card. See View Card Details.

Open Customer Record

To open the Customer Record for the Customer associated with the Card, see Figure 11-4 and do one of the following:

- Click the **name** of the Primary holder. The Customer Record of the primary holder opens in the Customer Dashboard.
- Click the **number** of Card Holders to open a menu containing a menu of all of the Customers associated with the Card. Click the **name** in the menu to open the Customer Record in the Customer Dashboard.

Figure 11-7 Card Holders

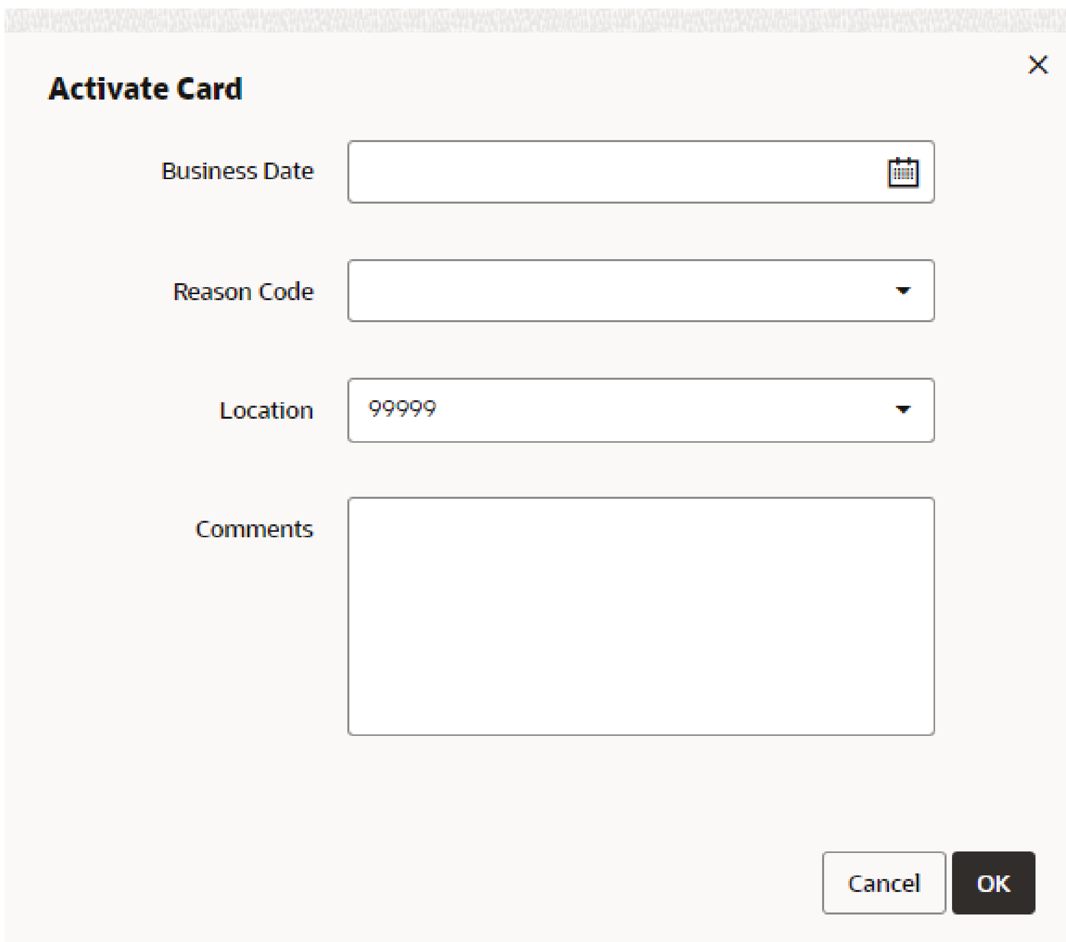


Activate Card

To activate a card do the following:

1. Click **Activate Card** in the Actions Menu. The Activate Card Window opens.

Figure 11-8 Activate Card Window



2. Select the **Business Date**.
3. Select the **Reason Code**.
4. Select the **Location** where the activation is being performed.
5. Enter **Comments** describing the reason for activating the Card.
6. Either click **OK** to close the Window and activate the Card or click **Cancel** to close the Window and keep the Card inactive.

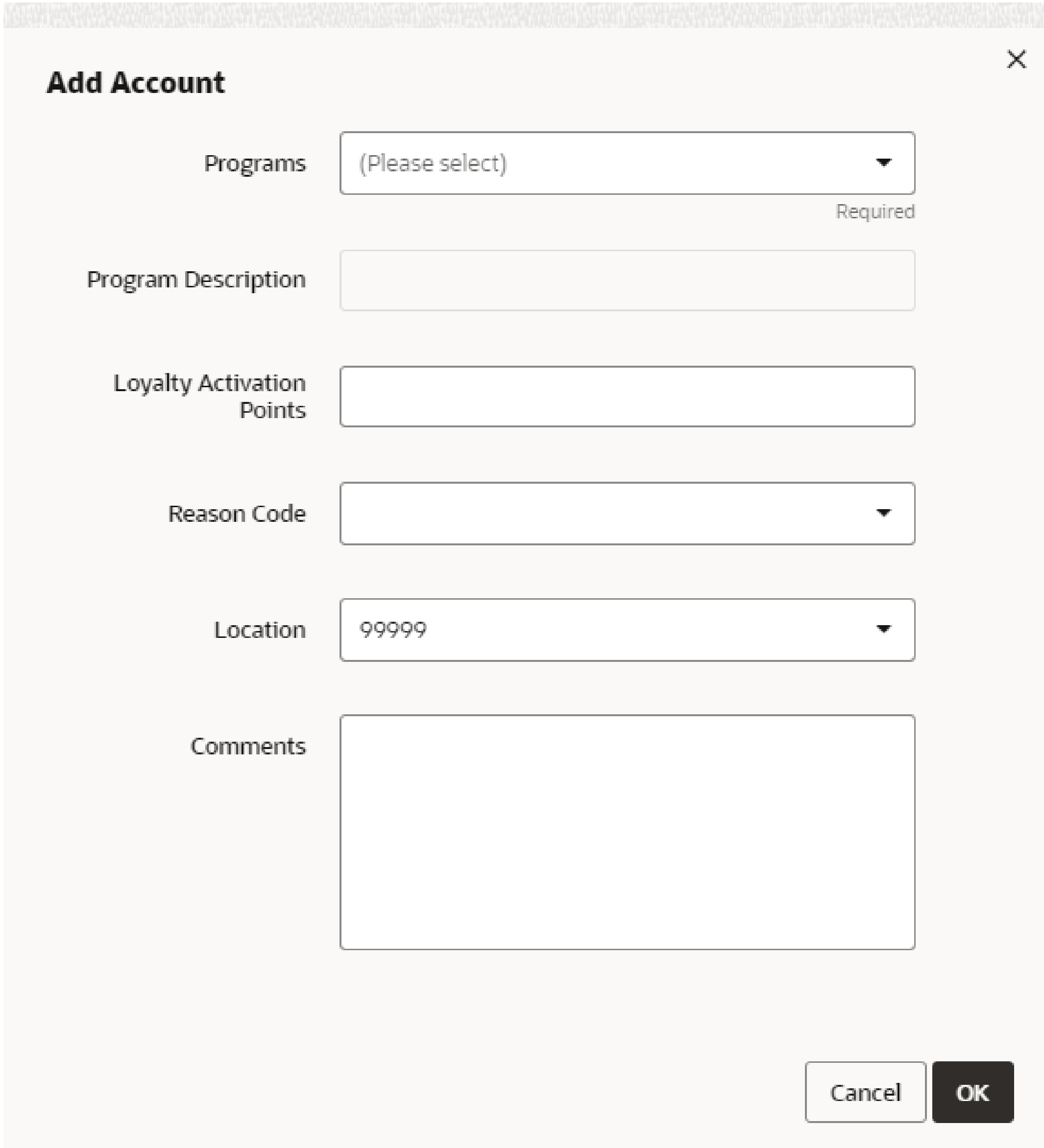
Add Account

Use this window to add a Loyalty Account to an activated Card.

> **Note:**
>
> This option is available only if there is Loyalty Account that has not been applied to the Card, when the Card was generated for a Program that has the Dynamically Create Accounts option selected. Also, the DynamicProgramAccountAdmin role controls access to this option.

1. Click **Add Account** in the Actions Menu, or click the **+ (Plus)** icon in the Accounts panel. The Add Account Window opens.

Figure 11-9 Add Account



2. Select the **Loyalty Program** to add an Account. Only Loyalty Programs that have the Dynamically Create Accounts option selected are available for selection. Also, if the Card is already associated with a Loyalty Account, it is not listed.

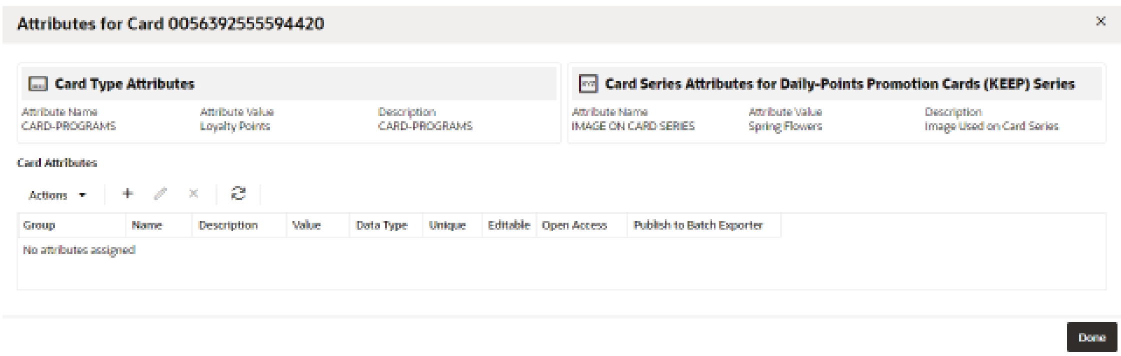
   When you select a Loyalty Program, the associated Program Description is displayed.
3. Optionally, enter the **Loyalty Activation Points** to issue at Account activation.
4. Select the **Reason Code** that indicates why you are creating the Account.
5. Select the **Location** identifying the location associated with the Account creation.
6. Optionally, enter any **Comments** related to the Account creation.
7. Either click **OK** to create the Account or click **Cancel** to close without saving.

> **Note:**
>
> If the card is not already activated, the window is different. You can select the Program, but there is no option to enter or select Loyalty Activation Points, Reason Code, Location ID, or Comments.

Card Attributes

Click **Card Attributes** to display Attributes for the Card, its Series, and its Type, and optionally to add or modify Attributes for the Card.

Figure 11-10 Card Attributes



Card Type Attributes

Card Type Attributes include the following:

- Attribute Name
- Attribute Value
- Description

Card Series Attributes

Card Series Attributes include the following:

- Attribute Name
- Attribute Value
- Description

Card Attributes

Card Attributes - A List of Card Attributes currently assigned to the Card. Information displayed for each Card Attribute:

- Group- The group associated with the attribute.
- Name - The Name of the Card Attribute.
- Description - The Description of the Card Attribute

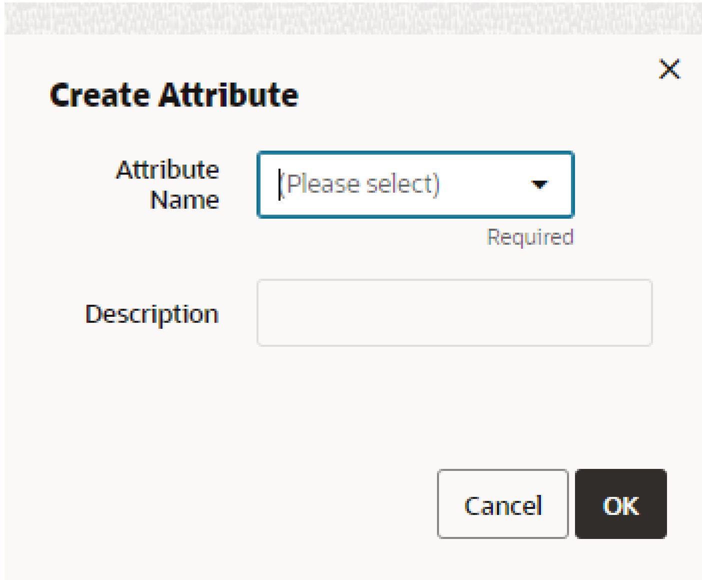
- Value - The current Value of the Card Attribute
- Data Type - The Card Attribute Data Type. Possible Data Types are:
  - Character - A string of characters entered through a Text Field
  - Number - A number value entered through a Text Field
  - Currency - A currency amount entered through a Text Field.
  - Date - A date entered through a Calendar Menu
  - Logical - A true or false value entered through a Selection Menu
  - List - One of a number of defined values selected through a Selection Menu
- Unique - Indicates whether the Attribute can be assigned more than once:
  - Yes - The Attribute can only be assigned to a Card once
  - No - The Attribute can be assigned to a Card multiple times.
- Editable - Indicates the permissions required for a user to edit this attribute value in a customer record.
  - Yes - This attribute can edited by any user with permission to edit customer records.
  - No - This attribute can only be edited by a user with system administration permissions.
- Open Access - Indicates whether there is Open Access to this attribute.
  - Yes - This Attribute has Open Access.
  - No - This Attribute does not have Open Access.
- Publish to Batch Exporter - Indicates whether each Attribute value can be included in batch export to a Marketing system.

Add Card Attribute

To add a Card Attribute to a Card:

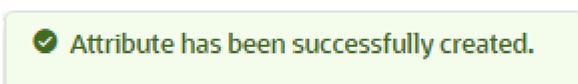
1. Click the **Actions Menu**, then, click **Add**, or click the **Add (+)** icon. This opens Create Attribute.

Figure 11-11 Create Attribute



2. Select the **Attribute Name**.
3. Enter or select the **Value** for the Attribute.
4. Either click **OK** to save the Attribute or **Cancel** to close without saving.

Figure 11-12 Confirmation Notification



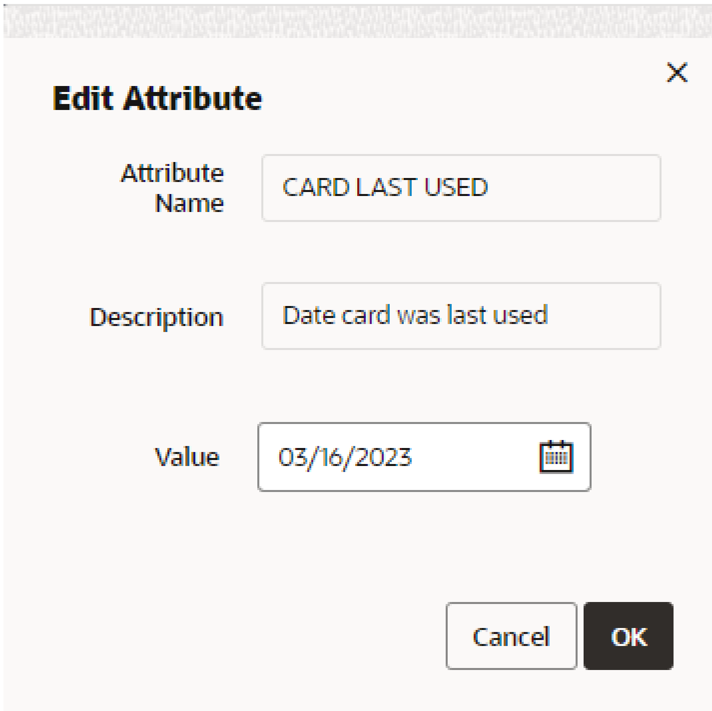
> **Note:**
>
> A confirmation notification appears to confirm the Attribute has been successfully created.

Editing Card Attributes

To edit an existing Card Attribute for a Card:

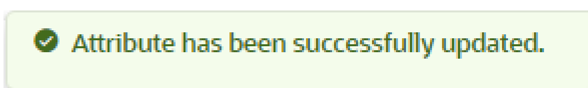
1. Click the **Actions Menu**, then, click **Edit**, or click the **Pencil** icon. This opens Edit Attribute.

Figure 11-13 Edit Attribute



2. To edit the Card Attribute value, select or enter the new values. Click **OK** to save the changes, or **Cancel** to close without saving.

Figure 11-14 Confirmation Notification



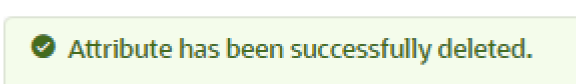
> **Note:**
>
> A confirmation notification appears to confirm the Attribute has been successfully updated.

Deleting a Card Attribute

To delete an existing Card Attribute for a Card:

1. Click the **Actions Menu**, then, click **Delete**, or click the **X** icon.
2. Click **OK** to delete the Attribute, or **Cancel** to close without saving.

Figure 11-15 Confirmation Notification



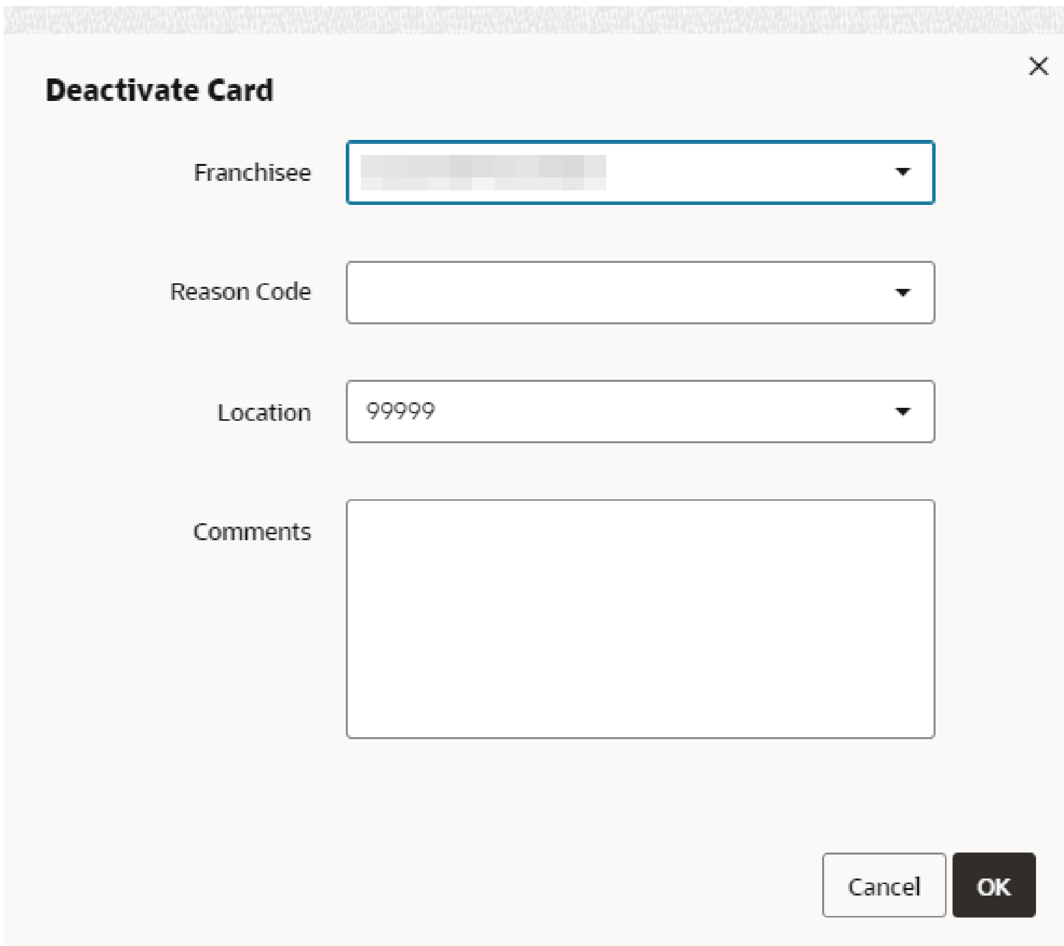
Note:

A confirmation notification appears to confirm the Attribute has been successfully deleted.

Deactivate Card

1. Click **Deactivate Card** in the Actions Menu. A Perform Action: Deactivate Card Window opens.

Figure 11-16 Deactivate Card Window



2. Select the **Franchisee** associated with the Card, if Franchises are enabled.
3. Select the **Reason Code**. Options include:
   - Client Request
   - Mgmt Decision
4. Select the **Location** where the deactivation is being performed.
5. Enter **Comments** describing the reason for deactivating the Card.

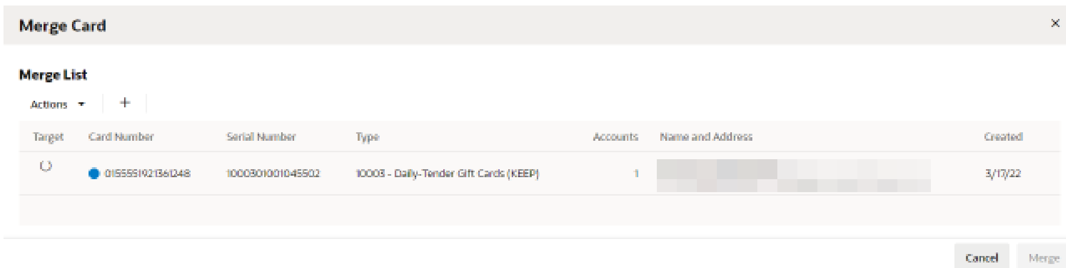
6. Either click **OK** to close the Window and deactivate the Card or click **Cancel** to close the Window and keep the Card active.

Merge Card

You can merge the Card with another Card as long as the Card Merge Permitted flag is not selected for a Program. To merge a Card with another Card:

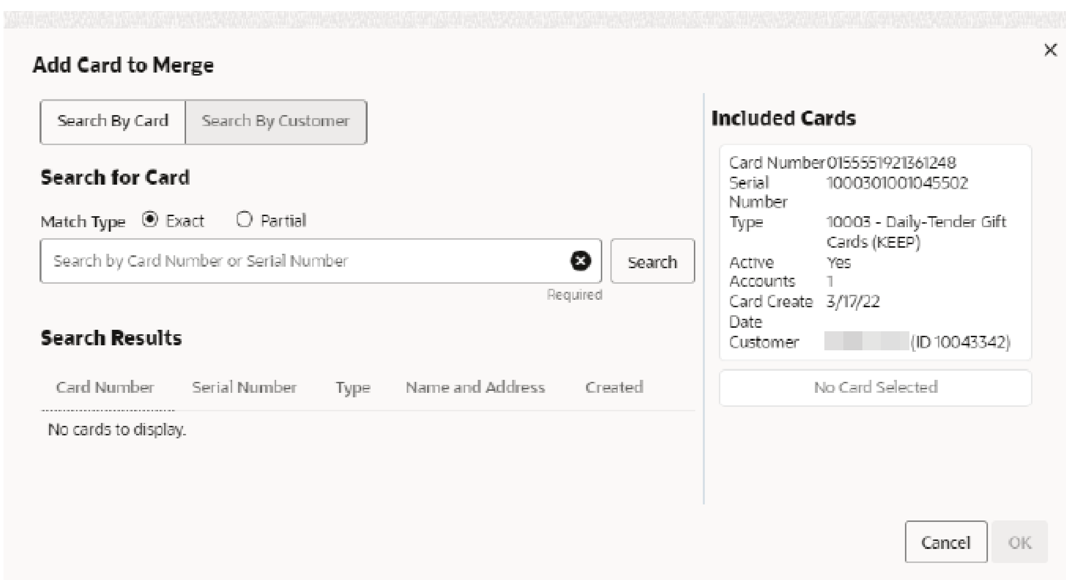
1. Click the **Actions Menu**, then, click **Merge Card**. A Merge Card Window opens.

Figure 11-17 Merge Card



2. Click the **Actions Menu**, then, click **Add Card to Merge**, or click the **+ (Plus)** icon. An Add Card to Merge Window opens.

Figure 11-18 Add Card to Merge



3. Use one of the following methods to search for a card to add to the merge.

   To add a card using Search By Card

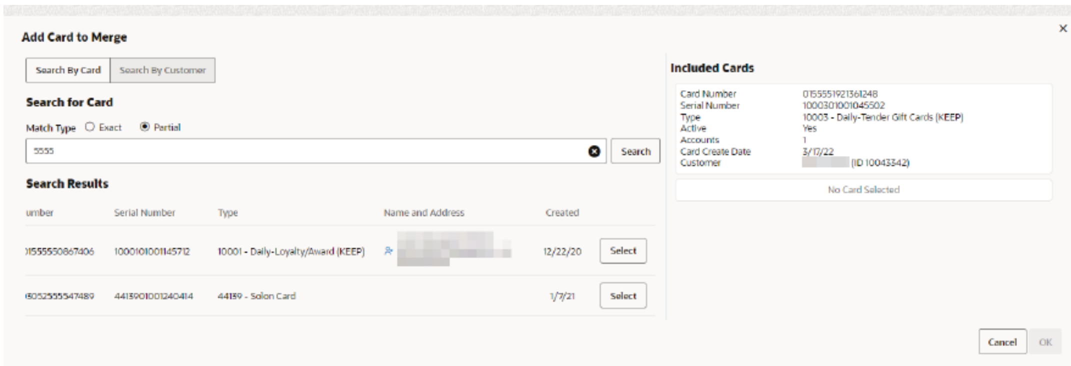
   - In the Search for Card field, enter the **Card Number** or **Serial Number** of the Card you want to search for. Click **Partial** to search for Cards that partially match the search text, or click **Exact**, to search for an exact match.

   To add a card using Search By Customer

- In the Search By Customer field, enter the **Customer Name**, **ID**, **Email Address**, or **Serial Number** of the Customer you want to search for. Click **Partial** to search for Customers that partially match the search text, or click **Exact**, to search for an exact match.

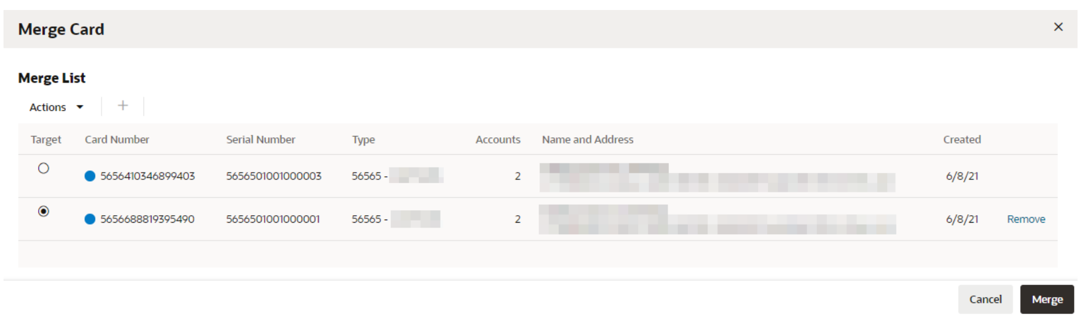
4. Click **Search**. The Search Results list displays the cards or customers matching the criteria.

Figure 11-19   Search Results: Add Card to Merge



5. Click **Select** to add the card to the merge.
6. Click **OK**. The Merge List appears.

Figure 11-20   Merge List



7. To complete the merge, select the **Target** card, then click **Merge**. The Cards are merged and the Window closes.

> **Note:**
>
> If you flag Loyalty Programs to Dynamically Create Accounts, it is possible that two Cards you are merging do not share the same Accounts. For example, Card A has Accounts for Programs 1 and 2, and Card B has Accounts for Programs 2 and 3. The merge will dynamically create the Accounts that do not already exist for Card A. After the merge, Card A has Accounts for Programs 1, 2, and 3, and Card B has deactivated Accounts for Programs 2 and 3.

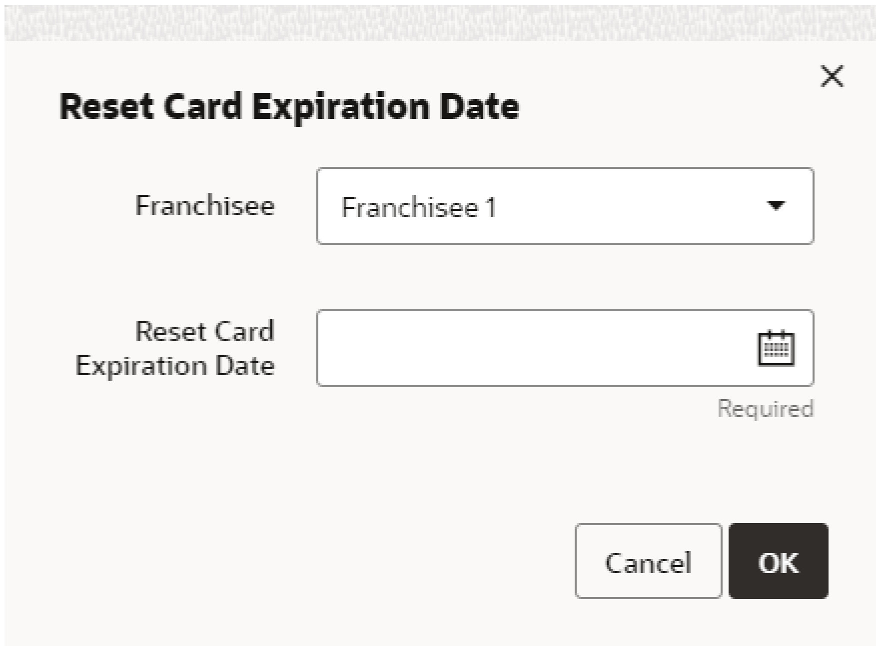
To exit the Window without merging the Cards, click **Cancel**.

Reset Card Expiration Date

Expiration dates can be set on individual Cards in Customer Engagement. To set a new expiration date for an individual Card:

1. Click **Reset Card Expiration Date** in the Actions Menu. A Reset Card Expiration Date Window opens.

Figure 11-21 Reset Card Expiration Date Window

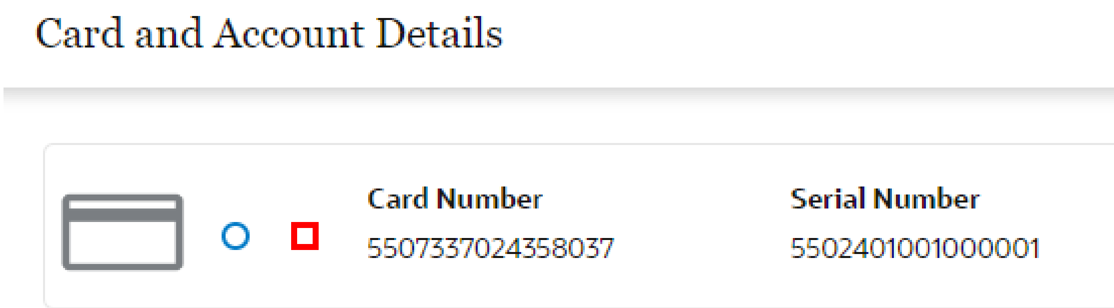


2. Select a **Franchisee**, if Franchisees are available.
3. Use the Reset Card Expiration Date Calendar Menu, select the **new expiration date** for the Card.
4. Either click **OK** to change the Card Expiration Date to the new value and close the Window or click **Cancel** to close the Window without saving.

Unblock Card

Typically a card will be blocked when the card has been deactivated and has a tender account on the card as shown inFigure 11-22. To unblock a card:

Figure 11-22 Blocked Card



1. Click **Unblock Card** in the Actions Menu.
2. Select a **Reason Code**.
3. Select a **Location**.
4. Enter **Comments**.
5. Click **OK** to unblock a card, or click **Cancel** to close without saving.

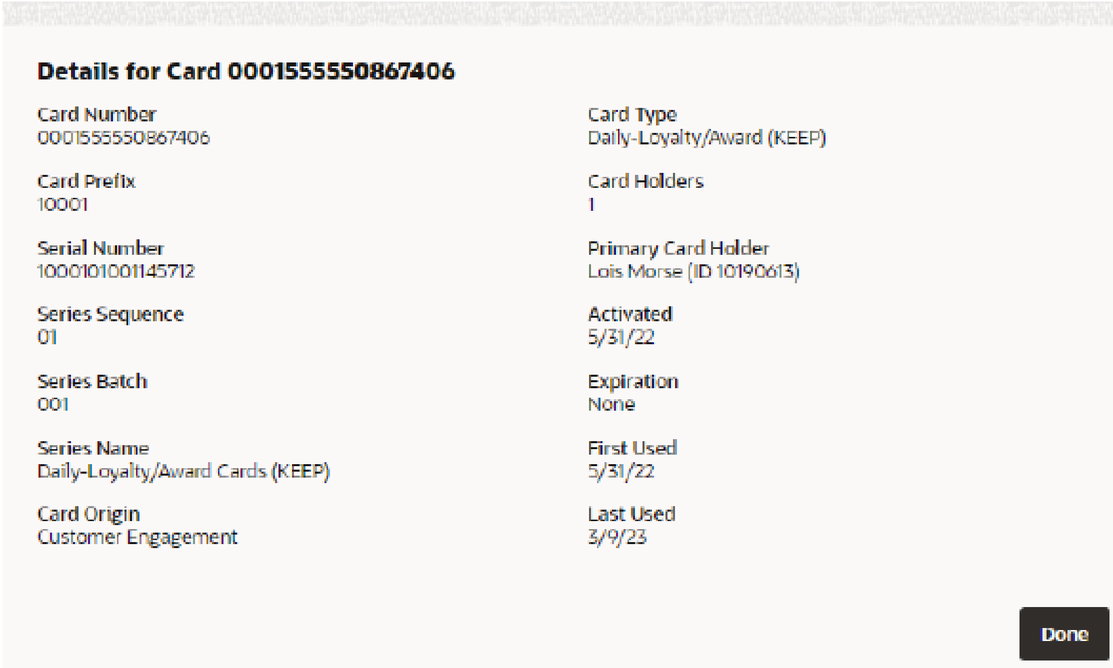
Figure 11-23 Confirmation Notification

> **Note:**
>
> A confirmation notification appears to confirm the card was unblocked successfully.

View Card Details

Click **View Card Details** to open the details for a card. Click **Done** to close the window.

Figure 11-24 Card Details



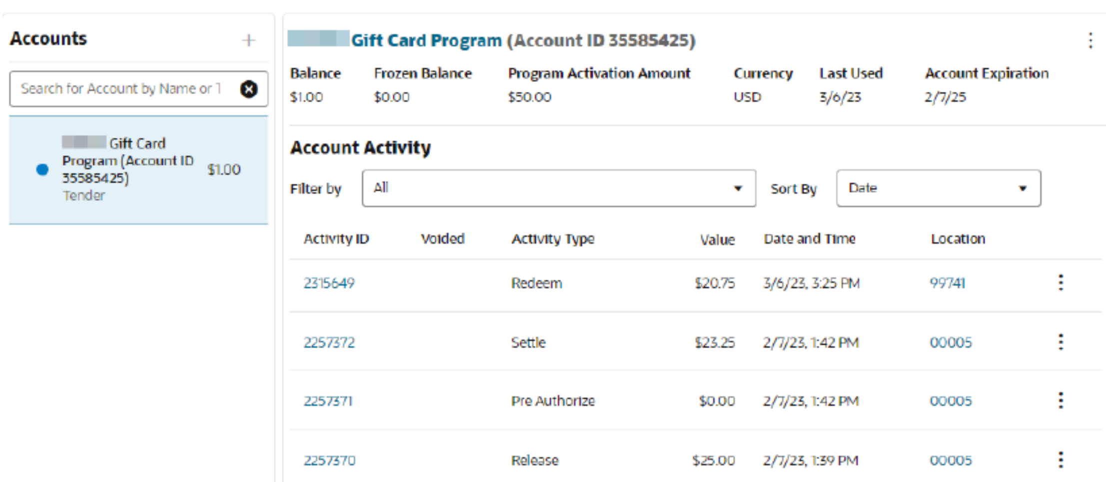
Account Information

Click the Account Number Link to view information about a specific Account. The information displayed for each Account depends upon its Account type: Tender Account, Award Account, or Loyalty Account.

Tender Account

The following information is displayed for each Tender Account:

Figure 11-25 Tender Account Information



- Tender Account Administration - Displays information about the Tender Account. This area includes the following information:
  - Program Name - Name of the Program to which the Account belongs.
  - Account ID - ID number for the Account.
  - Balance - Current tender balance of the Account.
  - Frozen Balance - Balance of the Account that is currently frozen.
  - Program Activation Amount - Amount the account will be activated for when there is no activation amount specified in the transaction. The original balance on the card could be different from this program activation amount.
  - Currency - Base currency for the Program.
  - Last Used Date - Date of the most recent activity on the Account.
  - Account Expiration - Date when the Account expires

> **Note:**
>
> Note that if the Tender Account was merged with another Account, Customer Engagement will display the message "Account has been merged" below the Tender Account Administration area.

- Tender Account Activity - A List displaying each action performed on the Account.

  The information in the List is determined by the Filter Activity Menu.

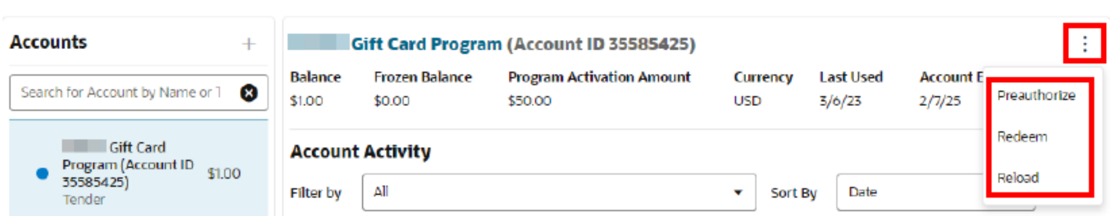
  The following information is displayed for each Account action:
  - Activity ID - ID of the activity on the Account.
  - Voided - Indicates whether the activity was voided.
  - Activity Type - Type of activity performed.
  - Value - Value applied to the Account by the activity.
  - Date and Time - Date and time of the activity.
  - Location - ID of the location where the activity occurred.

Filter Activity Menu

The Filter Activity menu is a Filter for the Tender Account Activity List. This Selection Menu filters the Tender Account Activity List by Activity Type, such as Deactivate. The default setting is All.

Tender Account Actions Menu

Figure 11-26 Tender Account Actions Menu



The Actions Menu for Tender Accounts displays the following options:

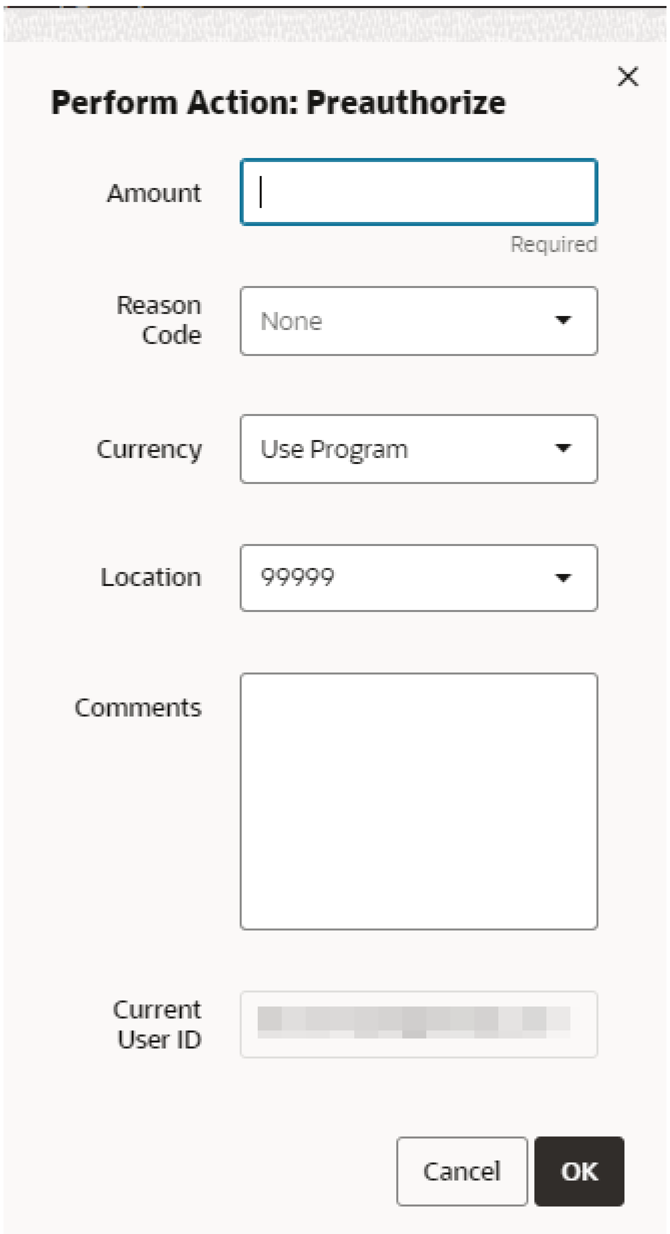
- Preauthorize - Preauthorize an amount on the Card. See Pre-Authorize an Amount.
- Redeem - Redeem an existing amount from the balance on the Card. See Redeem an Amount.
- Reload - Reload the Card with an additional amount. See Reload a Card.

Preauthorize an Amount

To preauthorize an amount on a Card:

1. Click **Preauthorize** in the Tender Account Actions Menu for a Tender Account. A Perform Action: Preauthorize Window opens.

Figure 11-27 Preauthorize Window



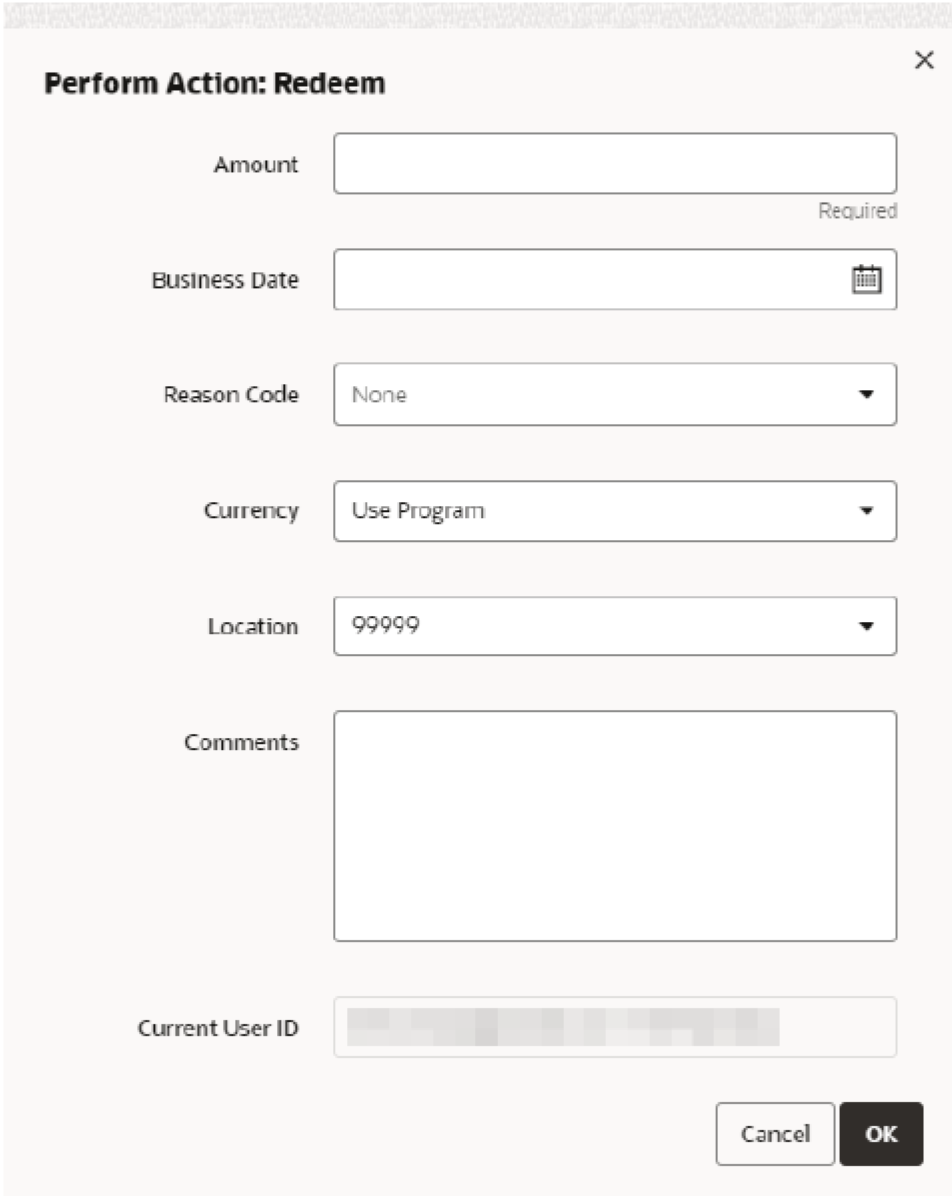
2. Enter the information for the pre-authorization:
   - **Amount** - The amount to be pre-authorized for the Card.
   - **Reason Code** - Use the Selection Menu to select the reason for the pre-authorization.
   - **Currency** - Use the Selection Menu to select the currency in which to pre-authorize the amount, or select Use Program [default] to use the base currency for the Program. This option is only available for Tender Programs that allow foreign currencies.
   - **Location** - Use the Selection Menu to select the location where the pre-authorization is being performed.
   - **Comments -** Enter any comments describing the pre-authorization.
3. Either click **OK** to perform the pre-authorization and close the Window or click **Cancel** to close the Window without pre-authorizing an amount.

Redeem an Amount

To redeem an amount from a Card:

1. Click Redeem in the Tender Account Actions Menu for a Tender Account. A Perform Action: Redeem Window opens.

Figure 11-28 Perform Action: Redeem



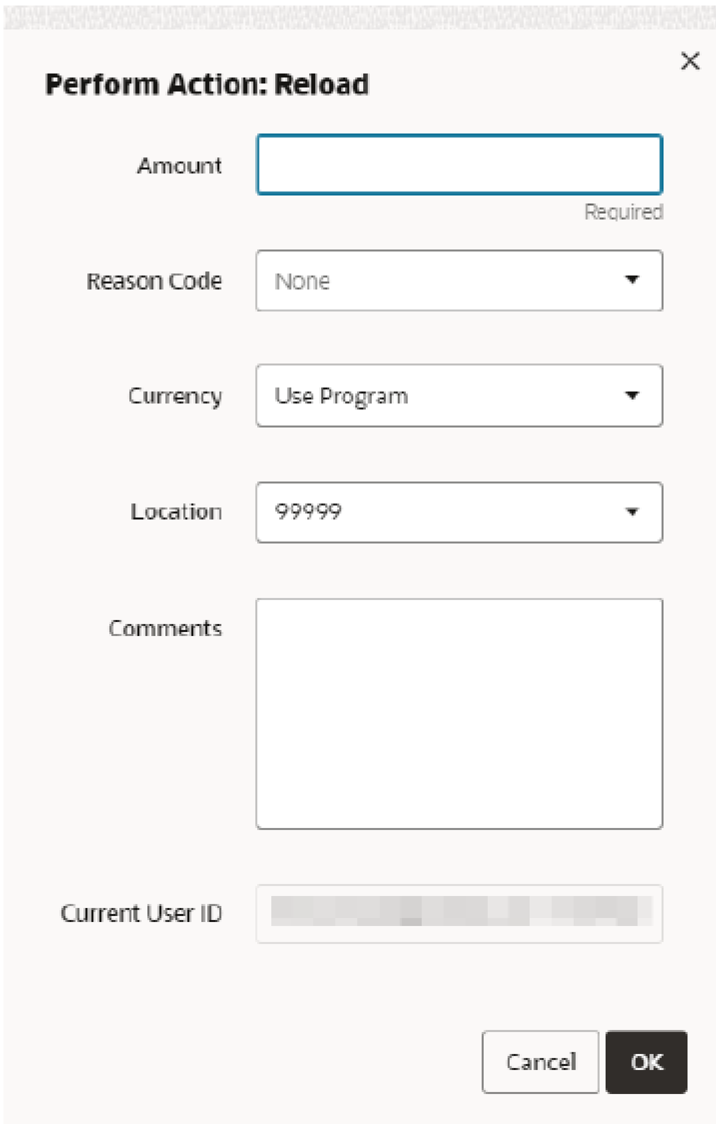
2. Enter the information for the redemption:
   - **Amount** - The amount to be redeemed.
   - **Reason Code** - Use the Selection Menu to select the reason for the redemption.
   - **Currency** - Use the Selection Menu to select the currency in which to redeem the amount, or select Use Program [default] to use the base currency for the Program. This field can only be changed in Tender Programs that allow foreign currencies.
   - **Location** - Use the Selection Menu to select the location where the redemption is being performed.
   - **Comments** - Enter any comments describing the redemption.
3. Either click **OK** to perform the redemption and close the Window or click **Cancel** to close the Window without redeeming an amount.

Reload a Card

To reload a Card with an amount:

1. Click Reload in the Tender Account Actions Menu for a Tender Account. A Perform Action: Reload Window opens.

Figure 11-29 Perform Action: Reload



2. Enter the information for the reload:
   - **Amount** - The amount to be loaded onto the Card.
   - **Reason Code** - Use the Selection Menu to select the reason for the reload.
   - **Currency** - Use the Selection Menu to select the currency in which to reload the amount, or select Use Program [default] to use the base currency for the Program. This option can only be changed in Tender Programs that allow foreign currencies.
   - **Location** - Use the Selection Menu to select the location where the reload is being performed.

- **Comments** - Enter any comments describing the reload.

3. Either click **OK** to perform the reload and close the Window or click **Cancel** to close the Window without reloading the Card.

Account Activity Actions Menu

The Actions Menu for Tender Accounts Account Activity List displays the following options:

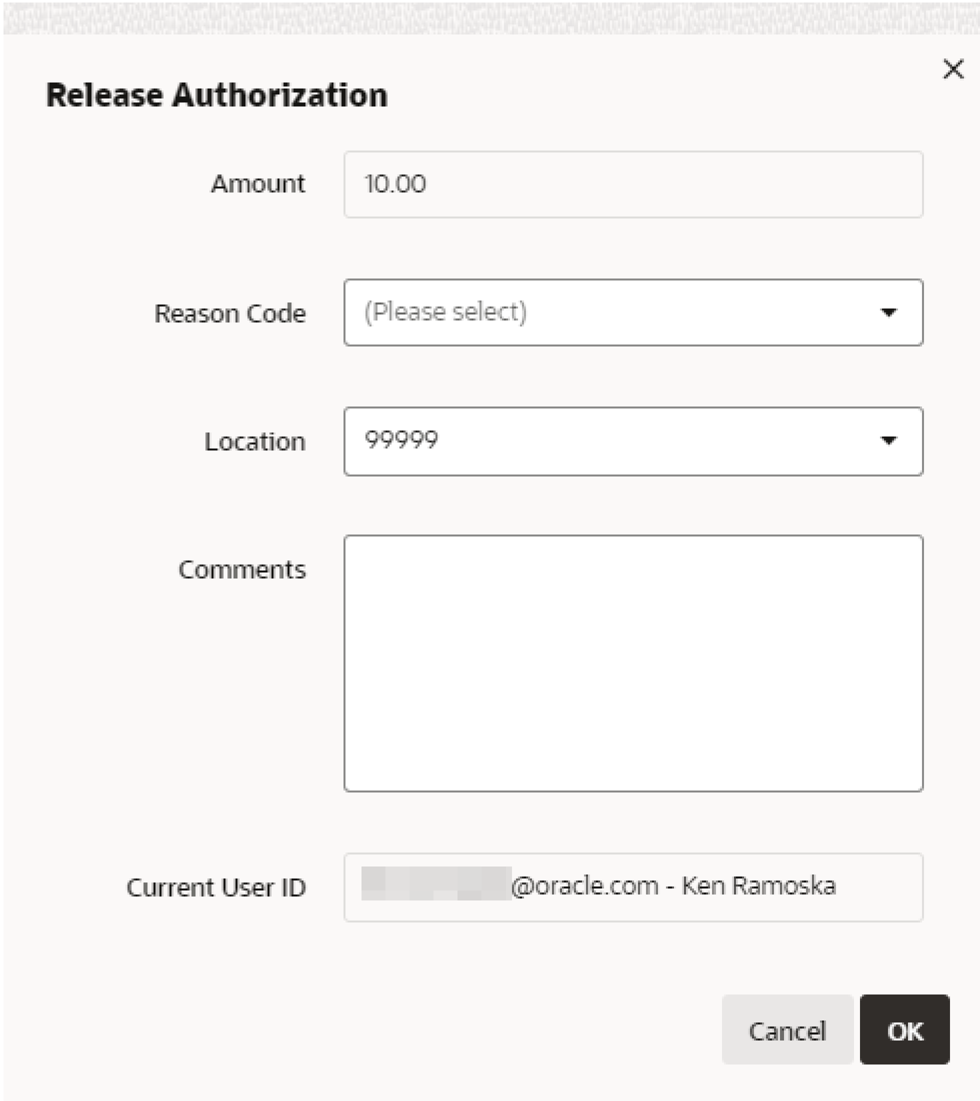
- **Release Authorization** - Releases the Authorization so that you can resolve an issue with the card.
- **Reverse Activity** - Reverses the selected activity
- **Settle Authorization** - Settles a preauthorization for a card, so that you can resolve an issue with the card.
- **View Activity Details** - Views the details of the selected activity.
- **Void Activity** - Voids the selected activity

Release Authorization

To Release Authorization:

1. Select **Release Authorization** in the Actions Menu. A Release Authorization Window opens.

Figure 11-30 Release Authorization



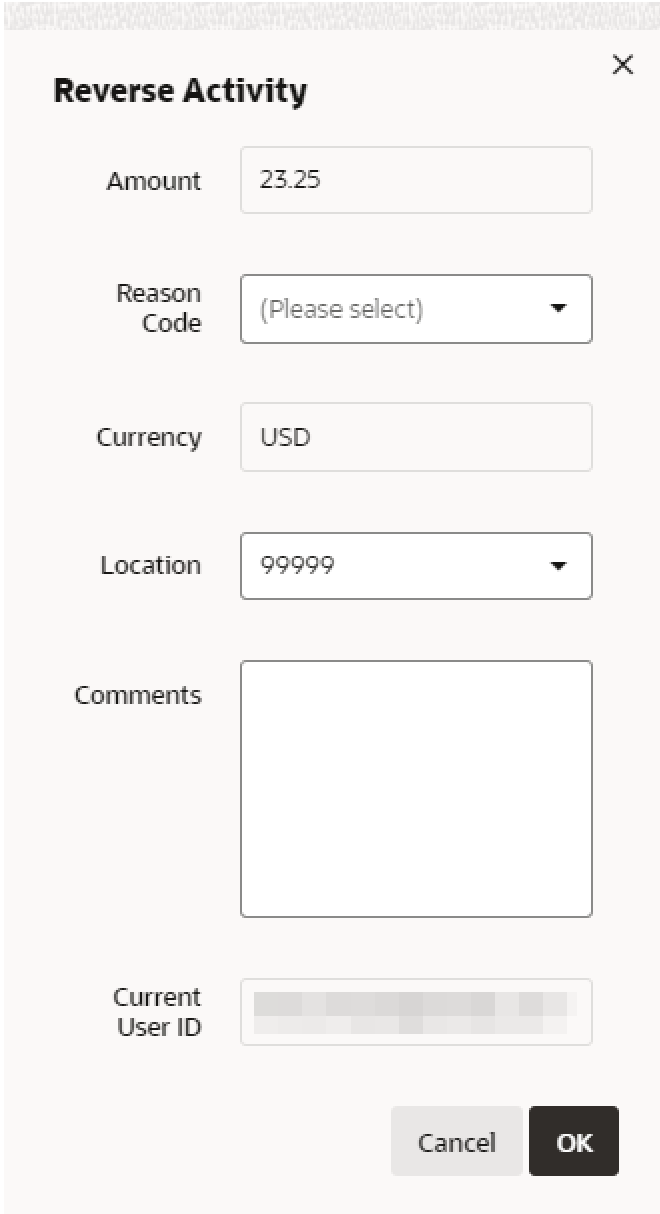
2. Select the **Reason Code**.
3. Select the **Location**.
4. Enter **Comments**.
5. Either click the **OK** button to release the authorization and close the Window or click the **Cancel** button to close the window without saving.

Reverse Activity

To Reverse Activity:

1. Select **Reverse** in the Actions Menu. A Reverse Activity Window opens.

Figure 11-31 Reverse Activity



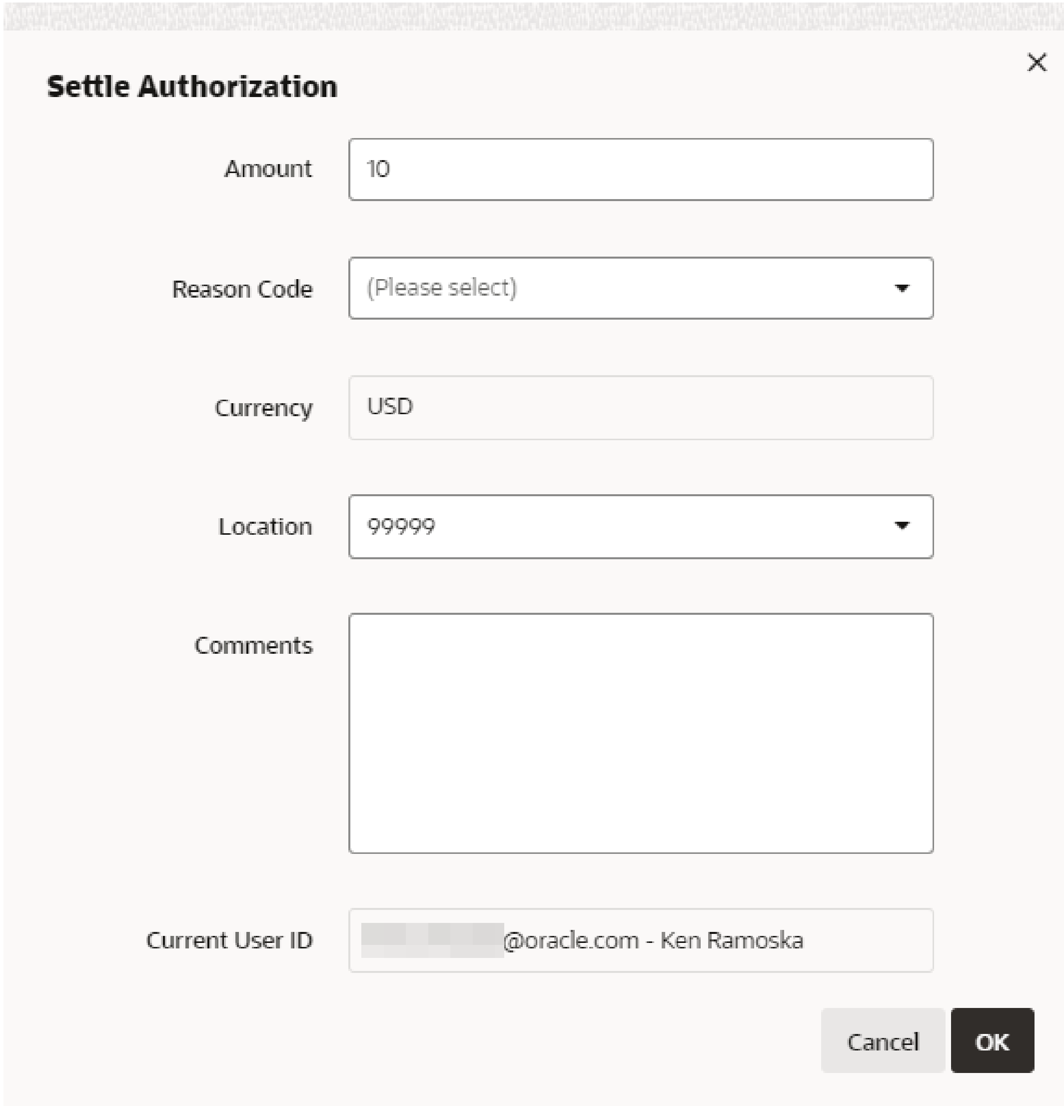
2. Select the **Reason Code** for the Reverse in the Selection Menu.
3. Select the **Location** to be used for the Reverse in the Selection Menu.
4. Enter **Comments** describing the reasons for the Reverse.
5. Either click the **OK** button to reverse the activity and close the Window or click the **Cancel** button to close the Window without reversing the activity.

Settle Authorization

To Settle Authorization:

1. Select **Settle Authorization** in the Actions Menu. A Settle Authorization window opens.

Figure 11-32 Settle Authorization

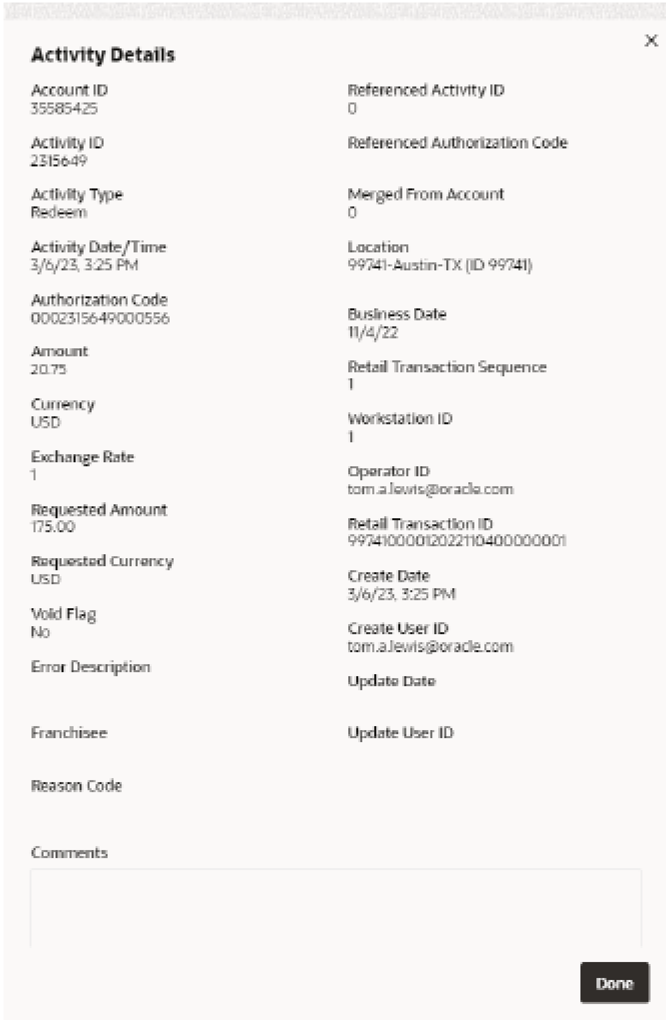


2. Enter the **Amount**.
3. Select the **Reason Code** for the Reverse in the Selection Menu.
4. Select the **Location**.
5. Enter **Comments**.
6. Either click the **OK** button to settle the authorization and close the Window or click the **Cancel** button to close the window without saving.

View Activity Details

Click an activity to view detailed information about an activity in the List of activities displayed for a Tender Account. The activity displays in the Activity Detail Window.

Figure 11-33 Activity Details Window - Tender Account



The Activity Detail Window displays the following information for the selected activity:

- Account ID - ID number for the Account associated with the activity.
- Activity ID - ID of the activity on the Account.
- Activity Type - Type of activity performed.
- Activity Date/Time - Date and time of the activity.
- Authorization Code - Authorization Code used by the activity.
- Amount - Amount applied to the Card by the activity.
- Currency - Currency used for the amount, if different from the base currency.
- Exchange Rate - If the transaction was performed in a foreign currency, the exchange rate between the foreign currency and the Account's base currency.
- Requested Amount - Requested currency amount.
- Requested Currency - Currency used for the requested amount, if different from the base currency.
- Void Flag - Indicates whether the activity was voided.

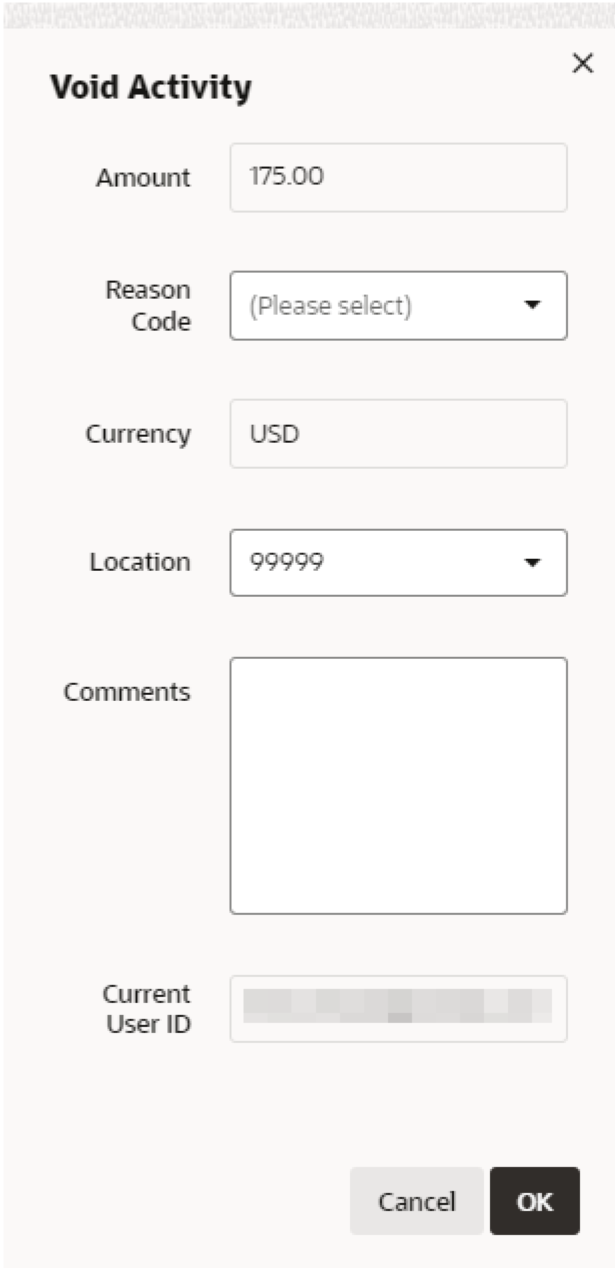
- Error Description - If an error occurred during the activity, a description of the error.
- Franchisee - Franchisee associated with the activity.
- Reason Code - Reason for the activity.
- New Expiration Date - The date the card expires.
- Referenced Activity ID - ID of an activity to which this activity refers.
- Referenced Authorization Code - Authorization Code used by the Referenced Activity.
- Merged From Account - If the Account was moved from another Account by a Card Merge, the ID number of the Account previously associated with the activity.
- Location ID - ID of the Location where the activity was performed.
- Location Name - Name of the Location where the activity was performed.
- Business Date - Business date of the activity.
- Retail Transaction ID - ID number of the activity within a retail transaction.
- Workstation ID - ID of the workstation (within the Location) where the activity was performed.
- Retail Tran ID - ID of the retail transaction of the activity. This field provides a Link to the Transaction in the Customer's Transaction History.
- Create Date - Date when the activity was created.
- Create User ID - ID of the user who created the activity.
- Update Date - Date when the activity was most recently updated.
- Update User ID - ID of the last user to update the activity.
- Comments - Additional comments entered about the activity.

Void Activity

To void an activity on an Account:

1. Open the activity in the Activity Detail Window.
2. In the Activity Detail Window, select Void in the Actions Menu. A Perform Action: Void Window opens.

Figure 11-34 Void Activity

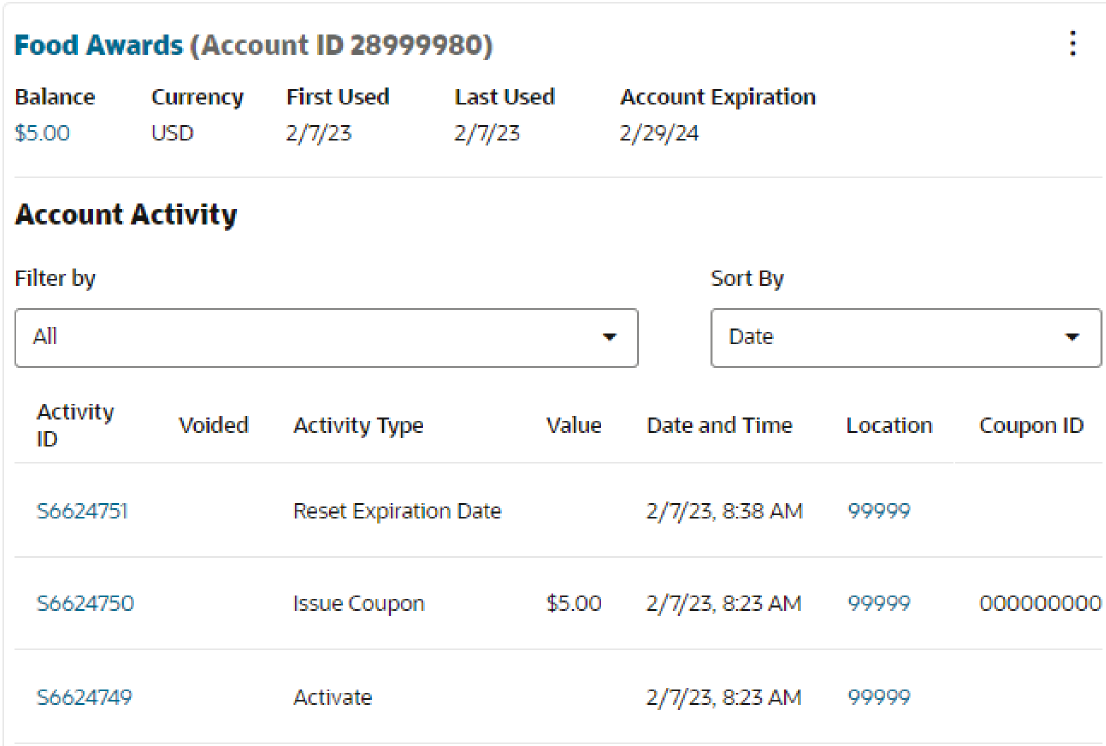


3. Select the Reason Code for the Void in the Selection Menu.
4. Select the Location to be used for the Void in the Selection Menu.
5. Enter Comments describing the reasons for the Void.
6. Either click **OK** to void the activity and close the Window or click **Cancel** to close the window without voiding the activity.

Award Account

The following information is displayed for each Award Account.

Figure 11-35 Award Account Information



- Award Account Administration - Displays information about the Award Account. This area includes the following information:
  - Program Name - Name of the Program to which the Account belongs. Click the **Program Name** to open the View Program window.
  - Account ID - ID number for the Account.
  - Balance - Current award balance of the Account.
  - First Used - Date of the first activity on the Account.
  - Last Used - Date of the most recent activity on the Account.
  - Account Expiration - Date when the Account expires.

  > **Note:**
  >
  > If the Award Account was merged with another Account, Customer Engagement displays the message "Account has been merged" below the Award Account Administration area.

- Award Account Activity - A List displaying each action performed on the Account.

  The information in the List is determined by the Filter Activity Menu.

  The following information is displayed for each Account action:
  - Activity ID - ID number of the activity within the transaction.
  - Voided - Indicates whether the activity was voided.

- Activity Type - Type of activity performed.
- Value - Displays the E-award value or the entitlement offer name. A link will display for an entitlement offer that will open the View Offer screen.

  Tender - Displays the activity amount.

  Award - Displays the e-award value or the entitlement offer name. A link will display for an entitlement offer that will open the View Offer screen.

  Loyalty - Displays the points associated with the activity.
- Date and Time - Date and time of the activity.
- Location - Location where the activity took place. Click the **Location** to view the Location Details.
- Coupon ID - ID number for the coupon (if any) created or redeemed by the activity.

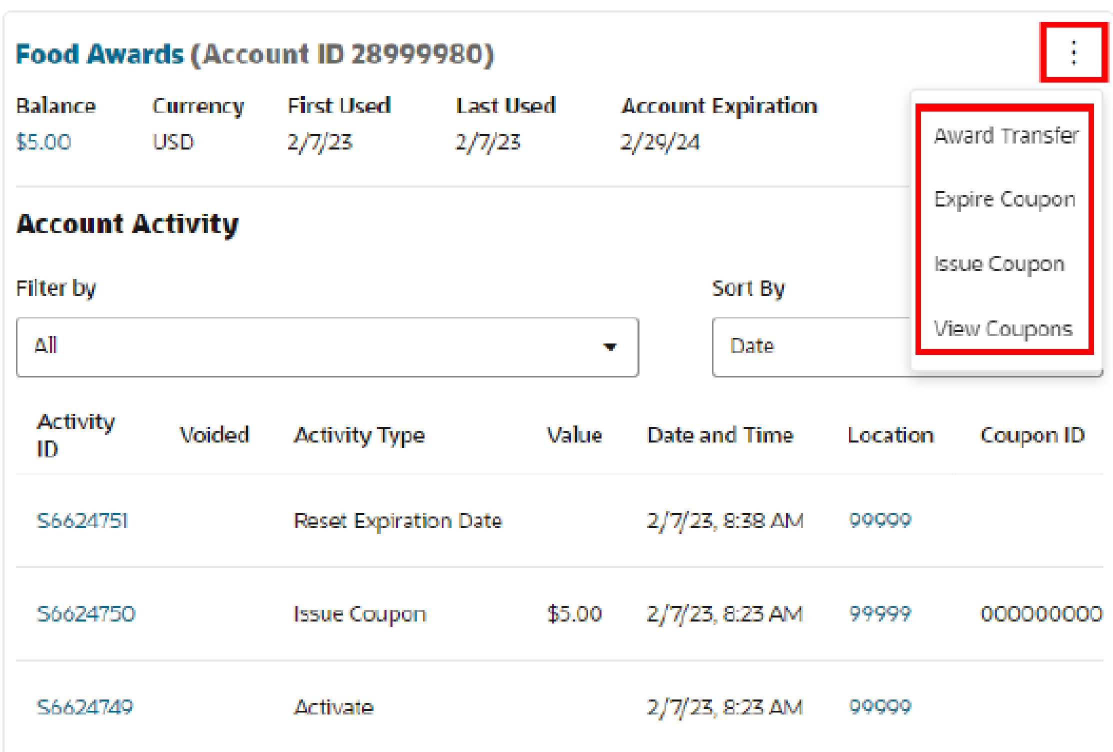
Filter Activity Menu

The Filter Activity menu is a Filter for the Award Account Activity List. This Selection Menu filters the Award Account Activity List by Activity Type, such as Activate or Issue Coupon. The default setting is All.

Award Account Actions Menu

The Actions Menu for the Award Account will display the following options.

Figure 11-36 Award Account Actions Menu



- Award Transfer - Transfer one or more E Awards or Award Certificate Coupons to another Award Account for the same Program. This option is available only if the Card is linked to an active Customer. See Transfer Award.
- Expire Coupon - Expire an E-Award or Award Certificate Coupon so that it can no longer be redeemed. See Expire Coupon.
- Issue Coupon - Issue a Coupon to the Customer. See Issue a Coupon.
- View Coupons - View the Coupons that have been issued by the Award Account to the Customer. See View Coupons.

Award Transfer

To transfer one or more E-Awards or Award Certificate Coupons to another Award Account for the same Program, select Award Transfer from the Award Account Actions Menu. The Award Transfer page opens.

Process

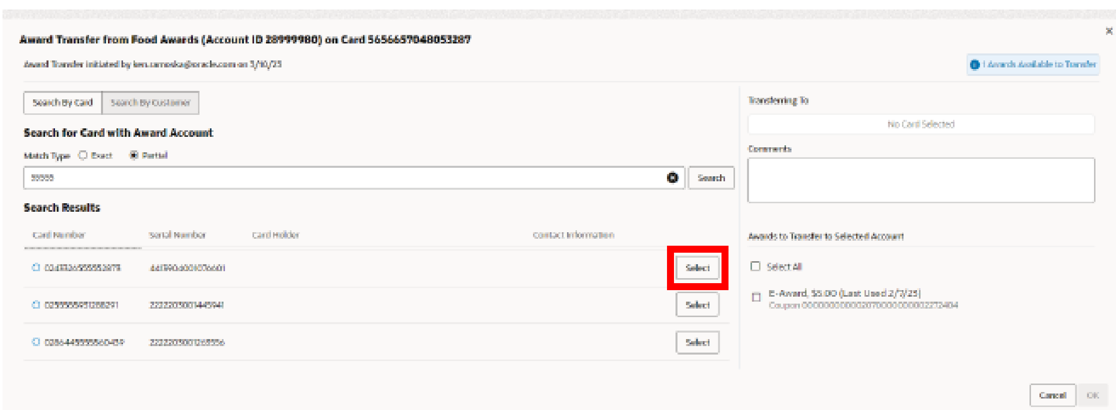
To add a card using Search By Card

- In the Search for Card with Award Account, enter the **Card Number** or **Serial Number** of the Card you want to search for. Click **Partial** to search for Cards that partially match the search text, or click **Exact**, to search for an exact match.

To add a card using Search By Customer

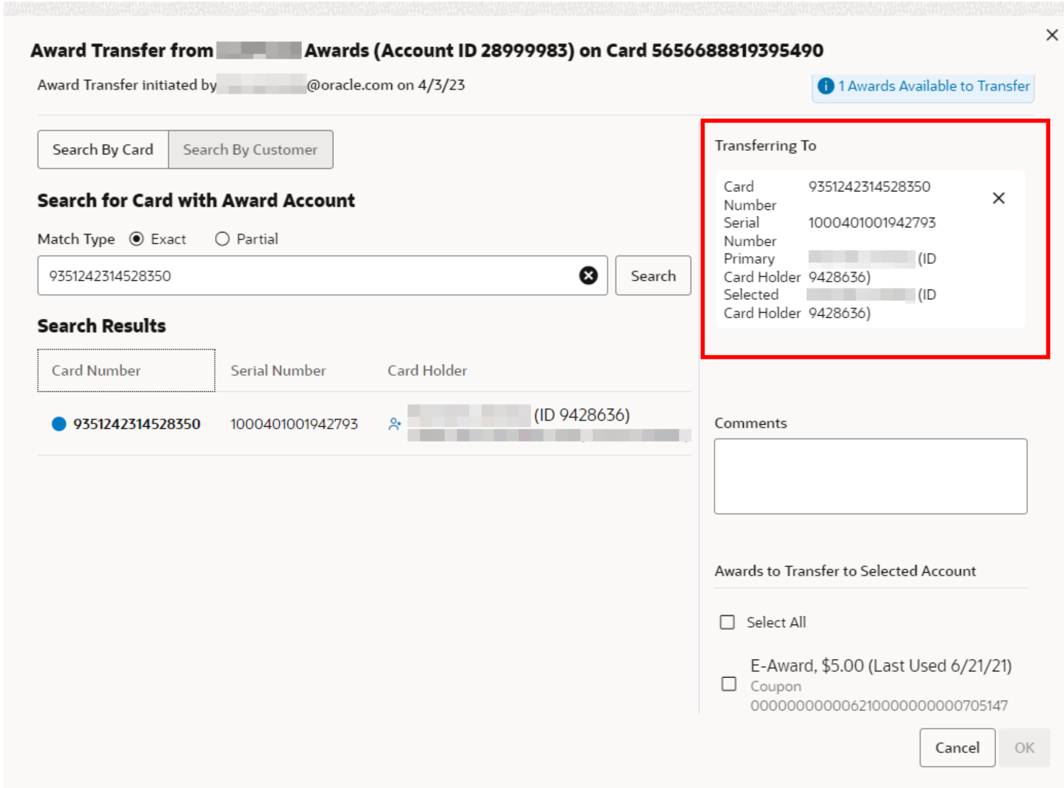
- In the Search By Customer field, enter the **Customer Name**, **ID**, **Email Address**, or **Phone Number** of the Customer you want to search for. Click **Partial** to search for Customers that partially match the search text, or click **Exact**, to search for an exact match.

Figure 11-37   Award Transfer - Search Results



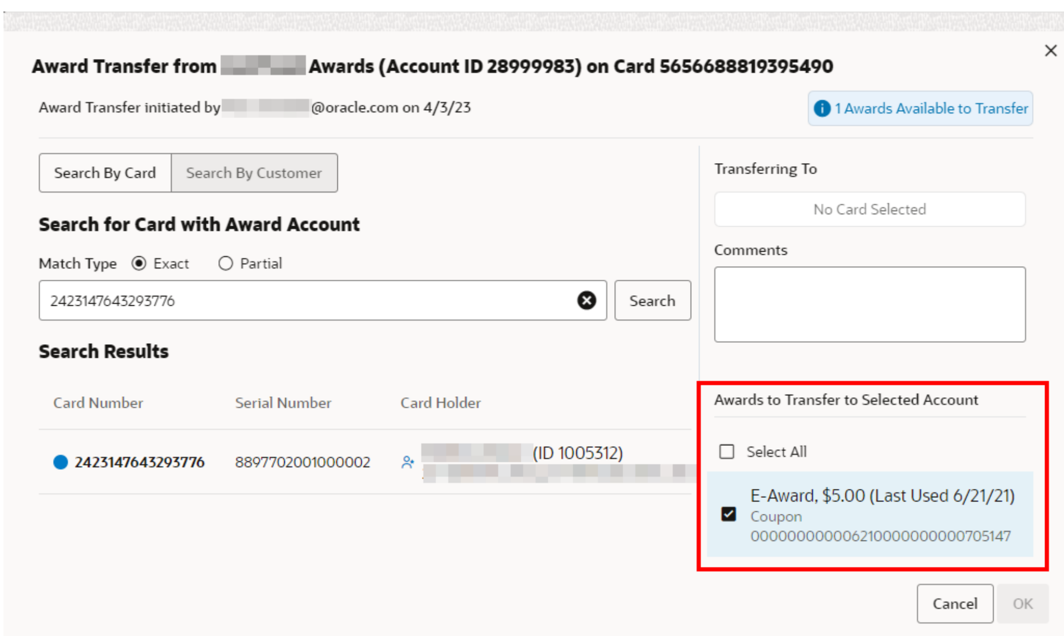
1. Click Select to populate the Transferring To area of the window.

Figure 11-38 Transferring To



2. Select the Awards to Transfer to Selected Account.

Figure 11-39 Awards to Transfer to Selected Account



The Account must be within the same Program, and the Customer must be the primary card holder.

The Transferring To area includes the following information:

- Program Name - Name of the Program
- Card Number - Card Number for the Card selected for award transfer.
- Serial Number - Serial Number for the Card selected for award transfer.
- Primary Card Holder - Customer number and name of the primary account holder.
- Selected Card Holder - Indicates the Customer associated with the Card.
- Current Balance - Current award balance of the Account.
- Comments

  The Awards to Transfer to Selected Account includes the following information:
- Coupon Type - E-Award or Award Certificate Coupon.
- Balance - The value of the E-Award.
- Last Used Date - The date and time of the most recent activity for the Coupon.
- Coupon ID - Unique identifier for the Award Coupon.

3. Click **OK** to transfer the award, or click **Cancel** to close the window without saving.

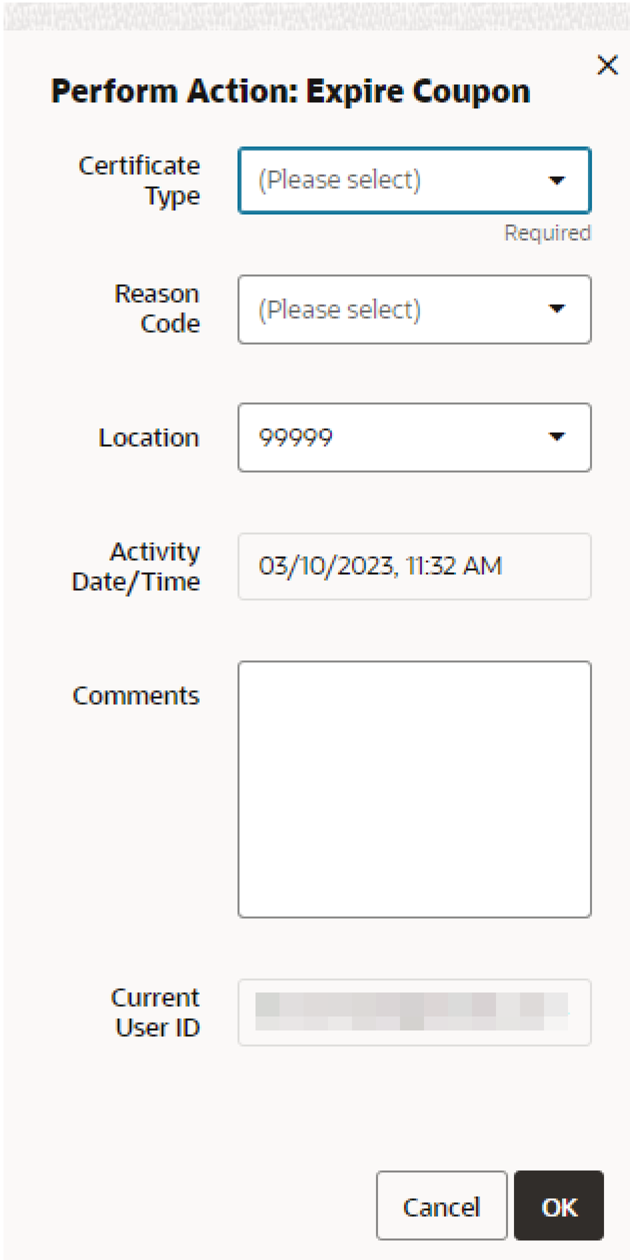
The E-Award or Award Certificate Coupon is transferred to the Destination Account. A Transfer In Activity Detail record is created for the Destination Account, and a Transfer Out Activity Detail record is created for the Source Account.

Expire Coupon

To expire an E-Award or Award Certificate Coupon for a Customer that was issued through an Award Account:

1. Click Expire Coupon in the Award Account Actions Menu. A Perform Action: Expire Coupon Window opens.

Figure 11-40 Perform Action: Expire Coupon



2. Enter the information for the Coupon:
   - Certificate Type - Use the Selection Menu to select either E-Award or Award Certificate Coupon.
   - Reason Code - Use the Selection Menu to select the reason for expiring the Coupon.
   - Location - Use the Selection Menu to select the location where the Coupon is being issued.
   - Comments - Enter any comments describing the Coupon expiration.

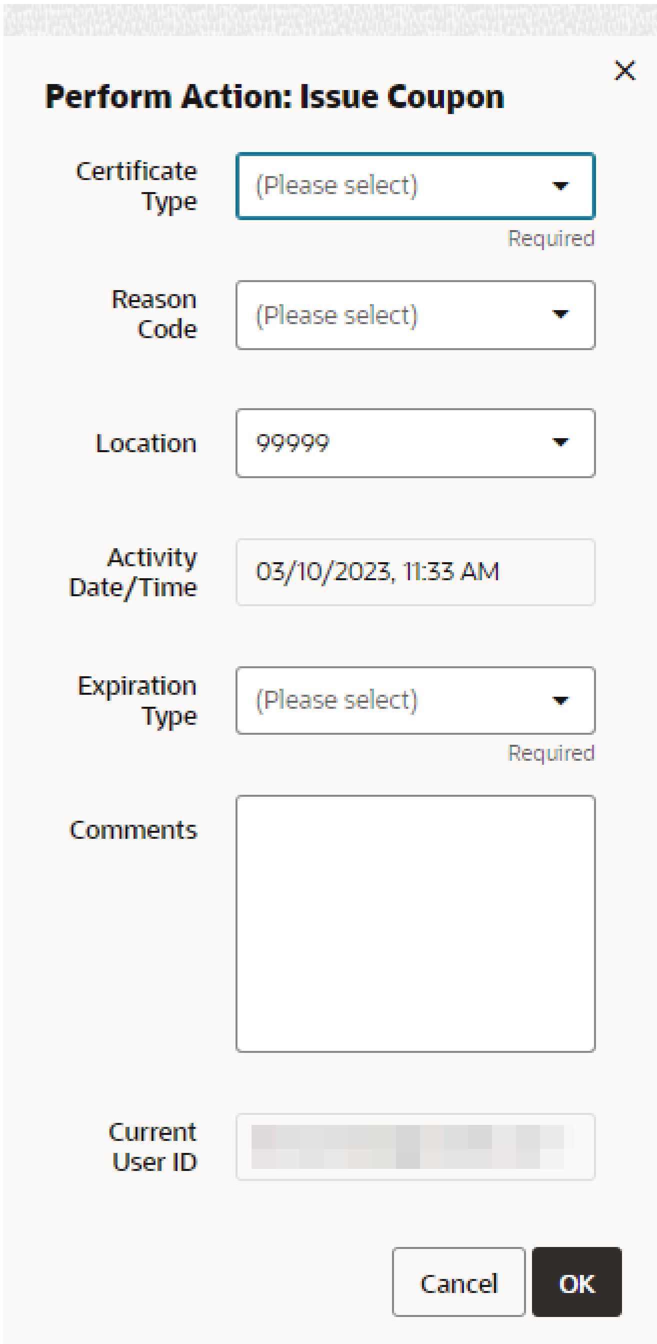
Either click **OK** to expire the Coupon and close the Window or click **Cancel** to close the Window without expiring the Coupon.

Issue a Coupon

To issue a Coupon to a Customer through an Award Account:

1. Click Issue Coupon in the Award Account Actions Menu. A Perform Action: Issue Coupon Window opens.

Figure 11-41   Perform Action: Issue Coupon



2. Enter the information for the Coupon:
   - Certificate Type - Use the Selection Menu to select either E-Award or Award Certificate Coupon.

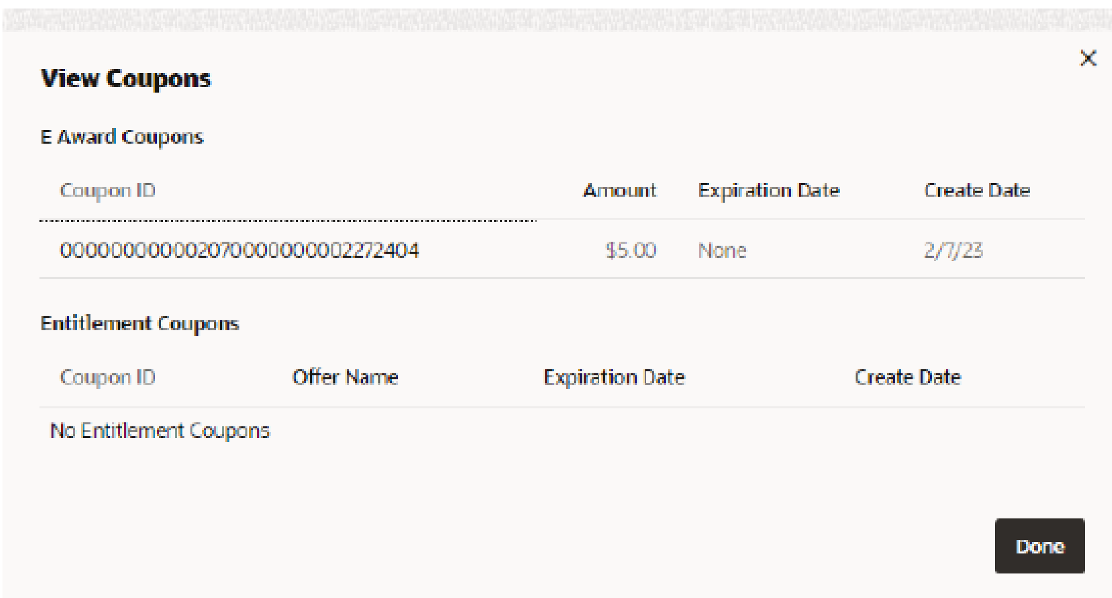
- Reason Code - Use the Selection Menu to select the reason for issuing the Coupon.
- Location - Use the Selection Menu to select the location where the Coupon is being issued.
- Expiration Type - Use the Selection Menu to select the type of expiration of the Coupon. This has the following options:
  - Use Program - Coupon expires when the Program expires.
  - Specify - Select a specific date when the Coupon expires.
  - None - No expiration date,.
- Expiration Date - Use the Calendar Menu to select the date when the Coupon will expire (only visible if the Expiration Date is Specify).
- Comments - Enter any comments describing the Coupon issue.

3. Either click **OK** to issue the Coupon and close the Window or click **Cancel** to close the Window without issuing a Coupon.

View Coupons

To view all of the Coupons issued to a Customer, select View Coupons in the Award Account Actions Menu to open a Coupons Window displaying a List of E-Award and Award Certificate Coupons issued through the Account.

Figure 11-42 View Coupon



E-Award Coupons: The following information is displayed for each E-Award Coupon issued and not expired:

- Coupon ID - The ID number for the Coupon.
- Amount - The amount of the Coupon (in the base currency of the Program).
- Expiration Date - The expiration date of the Coupon.
- Create Date - Date the Coupon was created.

Award Certificate Coupons: The following information is displayed for each Award Certificate Coupon issued and not expired:

- Coupon ID - The ID number for the Coupon.
- Offer Name - The name of the Offer associated with the Coupon.
- Expiration Date - The expiration date of the Coupon.
- Create Date - Date the Coupon was created.

Account Activity Actions Menu

The Actions Menu in the Award Account Activity Detail Window for the issue of an e-award or entitlement coupon has the following options.

- **View Activity Details** - Displays the Activity Details.
- **View Promotion Details** - Views the details of the promotion associated to the activity. This menu option will only display when there is an associated promotion.
- **View Offer Details** - Views the details of the offer associated to the activity. This menu option will only display when there is an associated offer.
- **Void Activity** - Voids the open activity.

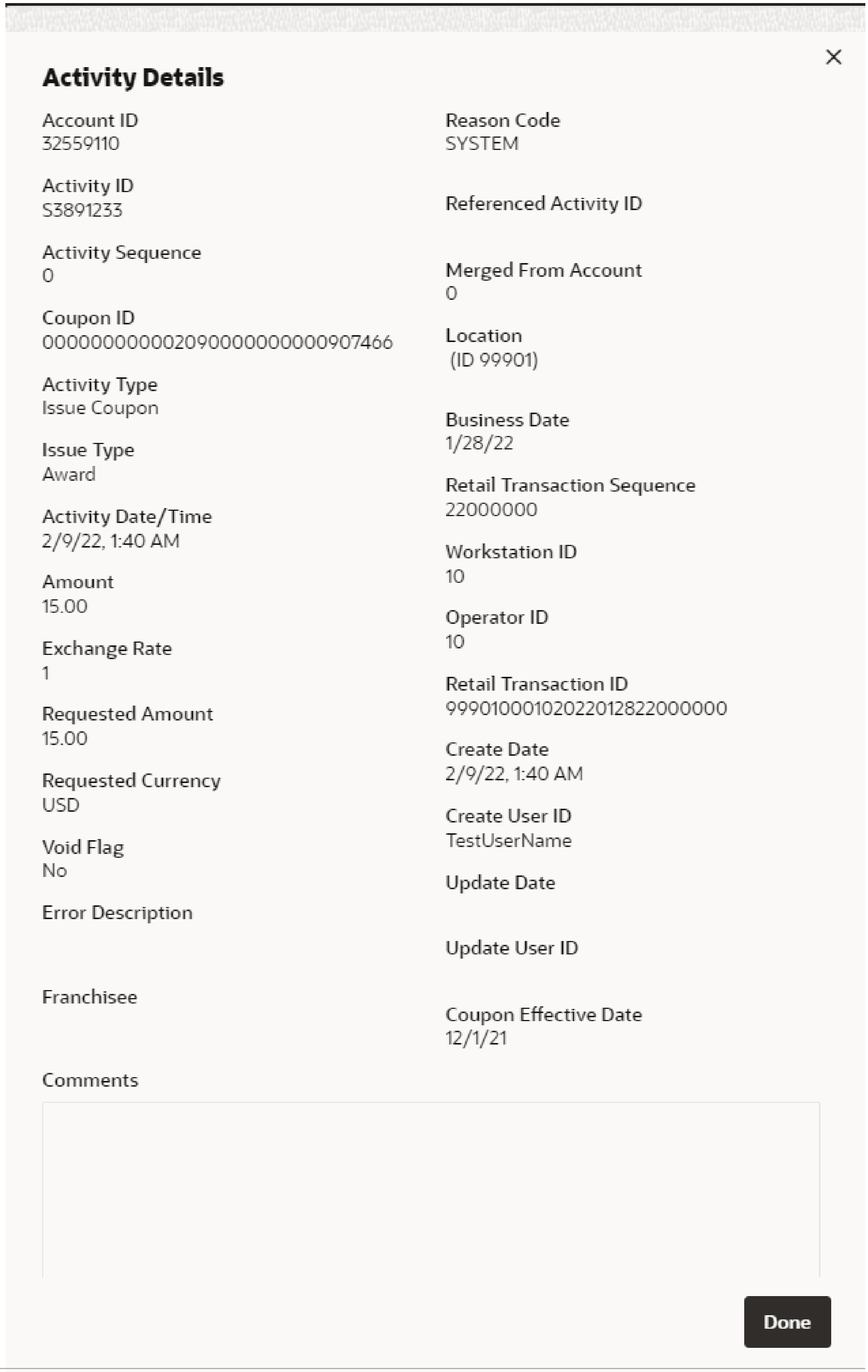
View Activity Details

Click an activity to view detailed information about an activity in the List of activities displayed for an Award Account. The activity will be displayed in the Activity Detail Window.

- Account ID - ID number for the Account associated with the activity.
- Activity ID - ID of the activity on the Account.
- Activity Sequence - Sequence number of the activity within a transaction.
- Coupon ID - ID number for the coupon (if any) created or redeemed by the activity.
- Activity Type - Type of activity performed.
- Issue Type - Type of benefit issued.
- Campaign - If the activity was associated to an award in a campaign, this field will be displayed and is the Name and ID of the campaign the award was from.
- Promotion - If the activity was associated to an award in a promotion, this field will be displayed and is the Name and ID of the promotion the award was from.
- Offer - If the activity was associated to an award in an offer, this field will be displayed and is the Name and ID of the offer the award was from.
- Activity Date/Time - Date and time of the activity.
- Amount - Amount applied to the Account by the activity, or removed from the Account in the case of a Transfer Out.
- Exchange Rate - If the transaction was performed in a foreign currency, the exchange rate between the foreign currency and the Account's base currency.
- Requested Amount - Requested currency amount.
- Requested Currency - Currency used for the requested amount, if different from the base currency.
- Void Flag - Indicates whether the activity was voided.
- Error Description - If an error occurred during the activity, a description of the error.

- Franchisee - Name of the Franchisee.
- Reason Code - Reason for the activity.
- Referenced Activity ID - ID of an activity to which this activity refers.
- Merged From Account - If the Account was moved from another Account by a Card Merge, the ID number of the Account previously associated with the activity.
- Location ID - ID of the Location where the activity was performed.
- Location Name - Name of the Location.
- Business Date - Business date of the activity.
- Retail Transaction Sequence - Sequence number of the activity within a retail transaction.
- Workstation ID - ID of the workstation (within the Location) where the activity was performed.
- Retail Tran ID - ID of the retail transaction where the activity was performed.
- Operator ID - ID of the employee who performed the transaction.
- Create Date - Date and time when the activity took place.
- Create User ID - ID of the user who created the activity.
- Update Date - Date when the activity was most recently updated.
- Update User ID - ID of the last user to update the activity.
- Coupon Effective Date - The date when the coupon becomes effective.
- Coupon Expiration Date - The date when the coupon expires.
- Comments - Additional comments entered about the activity.

Figure 11-43 Activity Details - Award Account



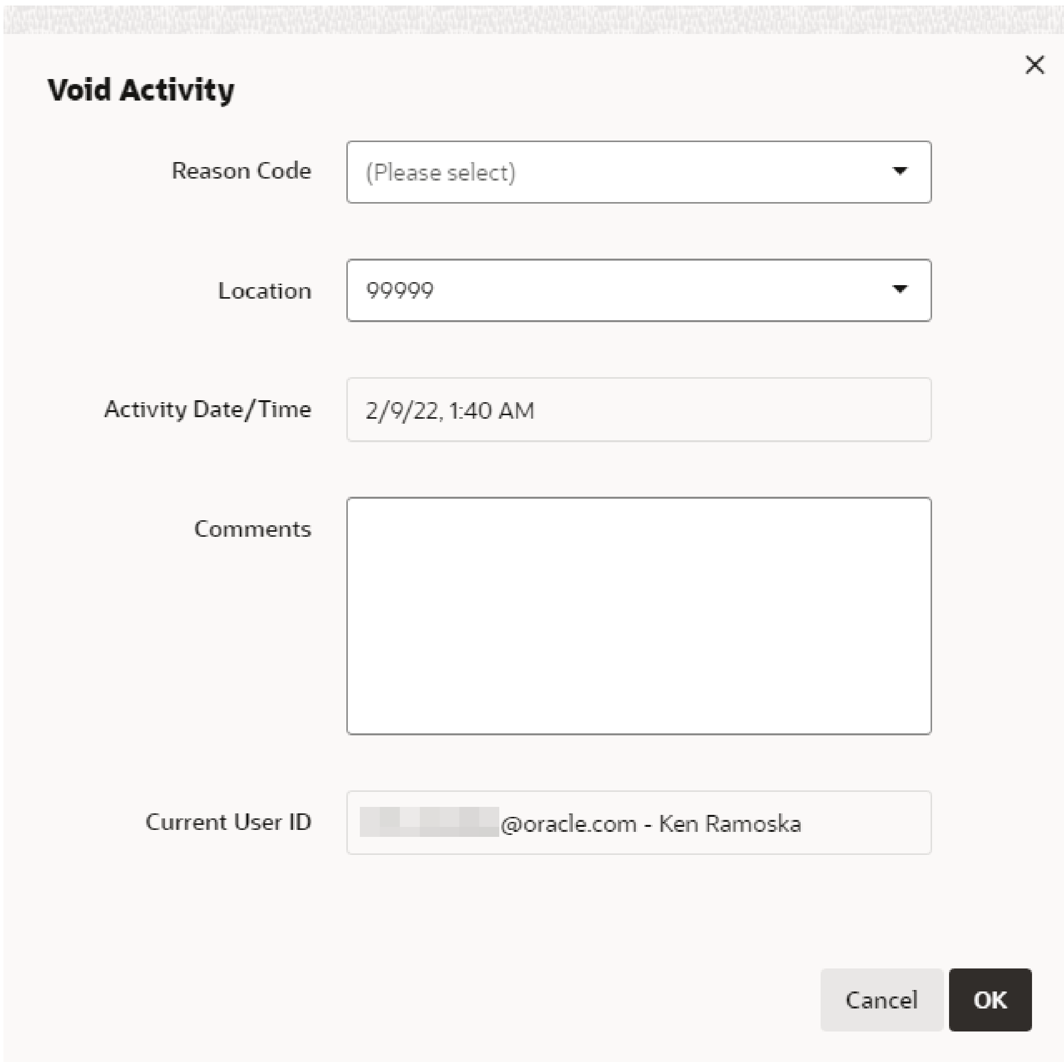
Click **Done** to close the window.

Void Activity

To void an activity on an Account:

1. Open the activity in the Activity Detail Window.
2. In the Activity Detail Window, select Void in the Actions Menu. A Perform Action: Void Window opens.

Figure 11-44 Void Activity

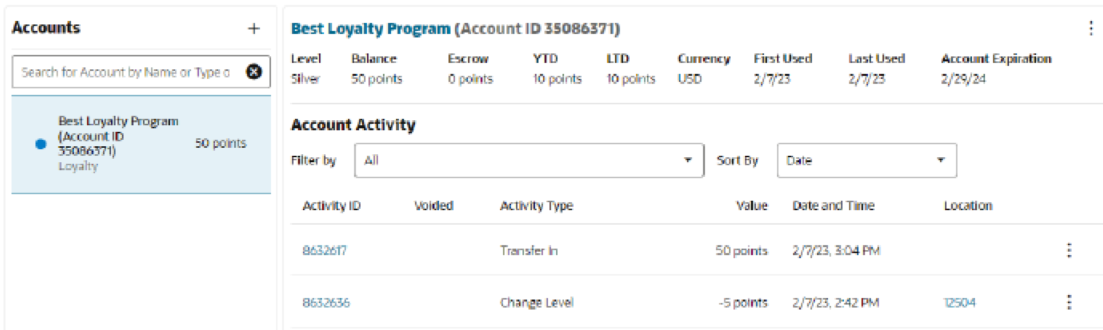


3. Select the Reason Code for the Void in the Selection Menu.
4. Select the Location to be used for the Void in the Selection Menu.
5. Enter Comments describing the reasons for the Void.
6. Either click **OK** to void the activity and close the Window or click **Cancel** to close the Window without voiding the activity.

Loyalty Account

The following information is displayed for each Loyalty Account:

Figure 11-45 Loyalty Account Card and Account Details



- Loyalty Account Administration. Displays information about the Loyalty Account. This area includes the following information.
  - Program Name - Name of the Program to which the Account belongs. Click the **Program Name** to view the View Program window.
  - Account ID - ID number for the Account.
  - Level - Name of the Loyalty Level to which the Account currently belongs.
  - Balance - Current points balance of the Account.
  - Escrow - Number of points currently escrowed in the Account.
  - YTD - Number of points earned by the Account in the current year to date.
  - LTD - Number of points earned by the Account during the lifetime of the Account.
  - First Used - Date of the first activity on the Account.
  - Last Used - Date of the most recent activity on the Account.
  - Account Expiration - Date when the Account expires.
- Loyalty Account Activity

  A List displaying each action performed on the Account.

  The information in the List is determined by the Filter Activity Menu.

  This List uses Page Navigation to organize the actions.

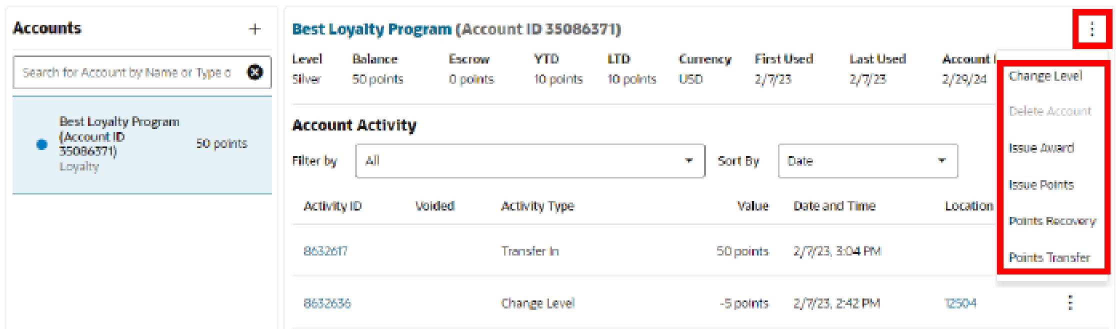
  The following information is displayed for each Account action:
  - Activity ID - ID of the activity on the Account.
  - Voided - Indicates whether the activity was voided.
  - Activity Type - Type of activity performed.
  - Value - Number of Points applied to the Account by the activity.
  - Date and Time - Date and time of the activity.
  - Location - Location of the activity. Click the **Location ID** to view the location details.

Filter Activity Menu

The Filter Activity menu is a Filter for the Loyalty Account Activity List. This Selection Menu filters the Loyalty Account Activity List by Activity Type, such as Change Level or Award. The default setting is All.

Loyalty Account Actions Menu

Figure 11-46 Loyalty Account Actions Menu



The Actions Menu for a Loyalty Account displays the following options.

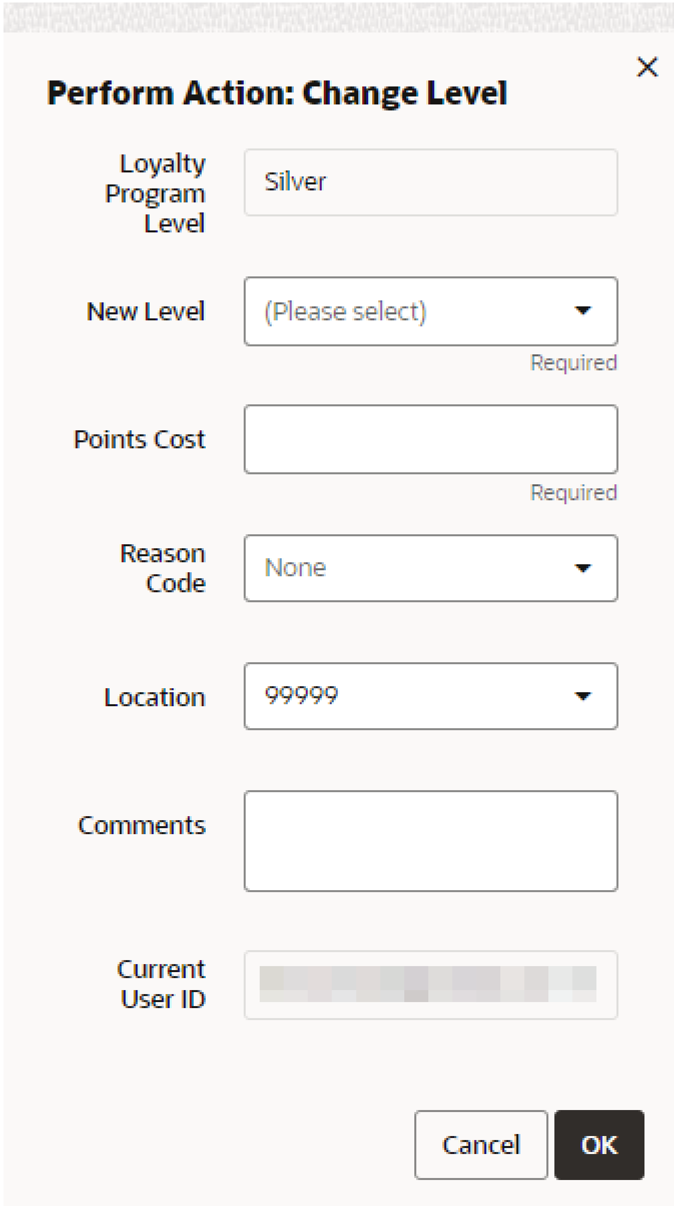
- Change Level - Change the Loyalty Level of the Loyalty Account. See Change Level.
- Delete Account - Delete a Loyalty Account that has been added to the Card. This option is available only for a Loyalty Account that was applied to the Card, because the Card was generated for a Program that has the Dynamically Create Accounts option selected. Also, the DynamicProgramAccountAdmin role controls access to this option. See Delete Account.
- Issue Award - Issue an award to a Customer. See Issue Award.
- Issue Points - Issue points to a Loyalty Account. See Issue Points.
- Point Recovery - Issue points that were not issued to a Customer in a previous transaction. See Recover Points.
- Points Transfer - Transfer points to another Loyalty Account for the same Program. This option is available only if the Card is linked to an active Customer. See Points Transfer.

Change Level

To change the Loyalty Level for a Customer:

1. Click Change Level in the Loyalty Account Actions Menu for a Loyalty Account. A Perform Action: Change Level Window opens.

Figure 11-47 Perform Action: Change Level



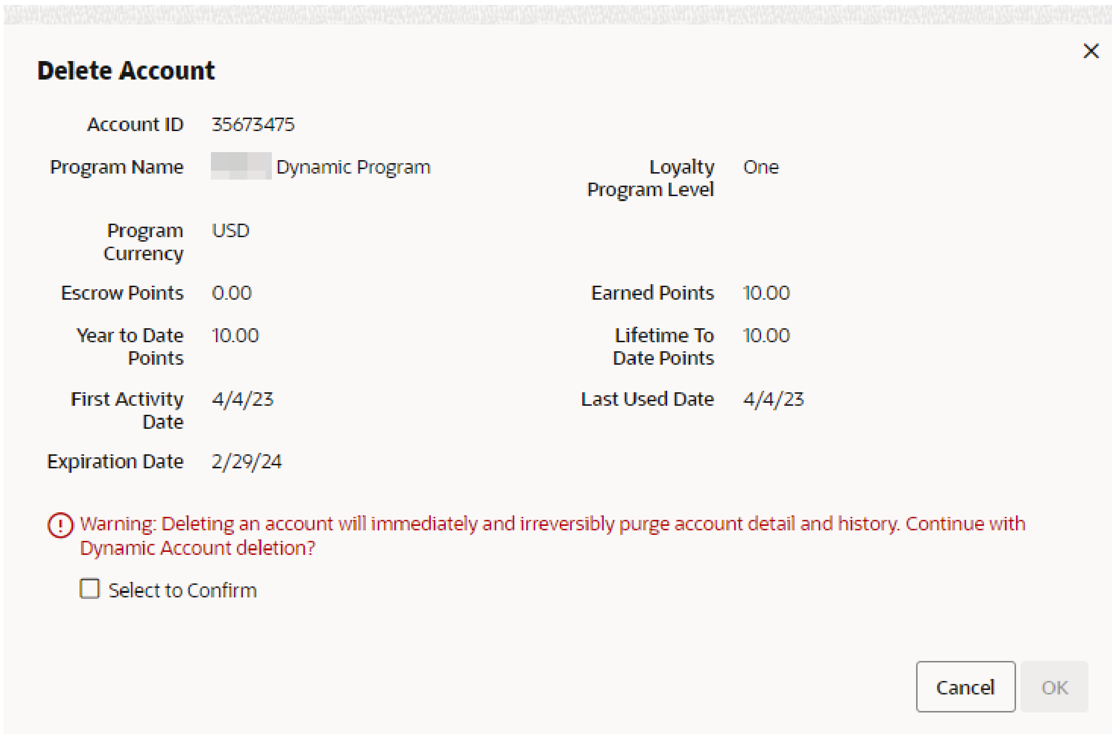
2. Enter the information for changing the Loyalty Level.
   - New Level - Use the Selection Menu to select the new Loyalty Level for the Account. The menu includes the Levels in the Loyalty Program.
   - Points Cost - The number of points to remove from the Loyalty Account for changing the Loyalty Level.
   - Reason Code - Use the Selection Menu to select the reason for changing the level.
   - Location - Use the Selection Menu to select the location where the Loyalty Level change is being performed.
   - Comments - Enter any comments describing the change in Loyalty Level.
3. Click **OK** to change the Loyalty Level and close the Window, or click **Cancel** to close the Window without change the Loyalty Level of the Account.

Delete Account

Select this option to delete a Loyalty Account that has been added to the Card. This option is available only for a Loyalty Account that was applied to the Card, because the Card was generated for a Program that has the Dynamically Create Accounts option selected. Also, the DynamicProgramAccountAdmin role controls access to this option.

Click **Delete Account** in the Loyalty Account Actions Menu for a Loyalty Account. The Delete Account window opens.

Figure 11-48 Delete Account



This window displays the following information about the Loyalty Account.

- Account ID - ID number for the Account associated with the activity.
- Program Name - Name of the Program to which the Account belongs.
- Program Currency - ID of the currency used for the Loyalty Program.
- Escrow Points - Number of points currently escrowed in the Account.
- Year to Date Points - Number of points earned by the Account in the current year to date.
- First Activity Date - Date of the first activity on the Account.
- Expiration Date - Date when the Account expires.
- Loyalty Program Level - Name of the Loyalty Level to which the Account currently belongs.
- Earned Points - Current points balance of the Account.
- Lifetime To Date Points - Number of points earned by the Account during the lifetime of the Account.

- Last Used Date - Date of the most recent activity on the Account.

Click **Select to Confirm** and then click **OK** to delete the Loyalty Account.

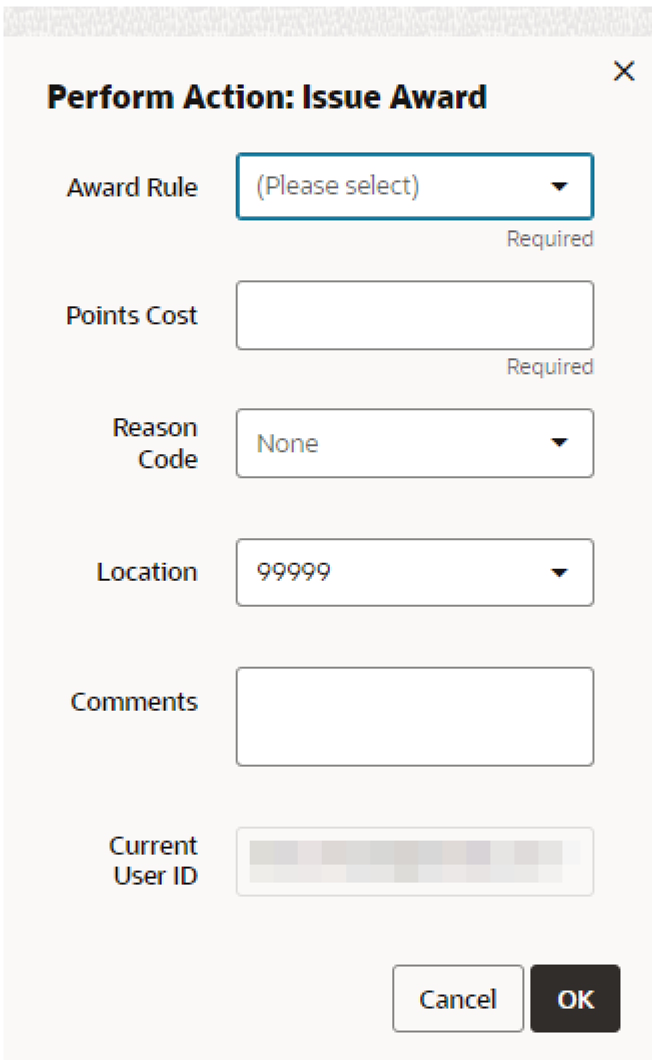
Note that when you delete a Loyalty Account, this information is not included in the Batch Export.

Issue Award

To issue an Award to an Account:

1. Click Award in the Loyalty Account Actions Menu for a Loyalty Account. A Perform Action: Issue Award Window opens.

Figure 11-49 Perform Action: Issue Award



2. Enter the information for issuing the award.
   - Award Rule - Use the Selection Menu to select the Award Rule to use for issuing the Coupon for the Loyalty Account. The menu includes those Award Rules that belong to the Loyalty Program and Level the account is currently assigned to.

> **Note:**
>
> Only the award rules for the 'paper' coupons will be listed. The rules created for e-awards and award certificates will not be displayed

- Points Cost - The number of points to remove from the Loyalty Account as part of issuing the Coupon.
- Reason Code - Use the Selection Menu to select the reason for awarding the points.
- Location - Use the Selection Menu to select the location where the Award is being issued.
- Comments - Enter any comments describing the issuance of the Award.

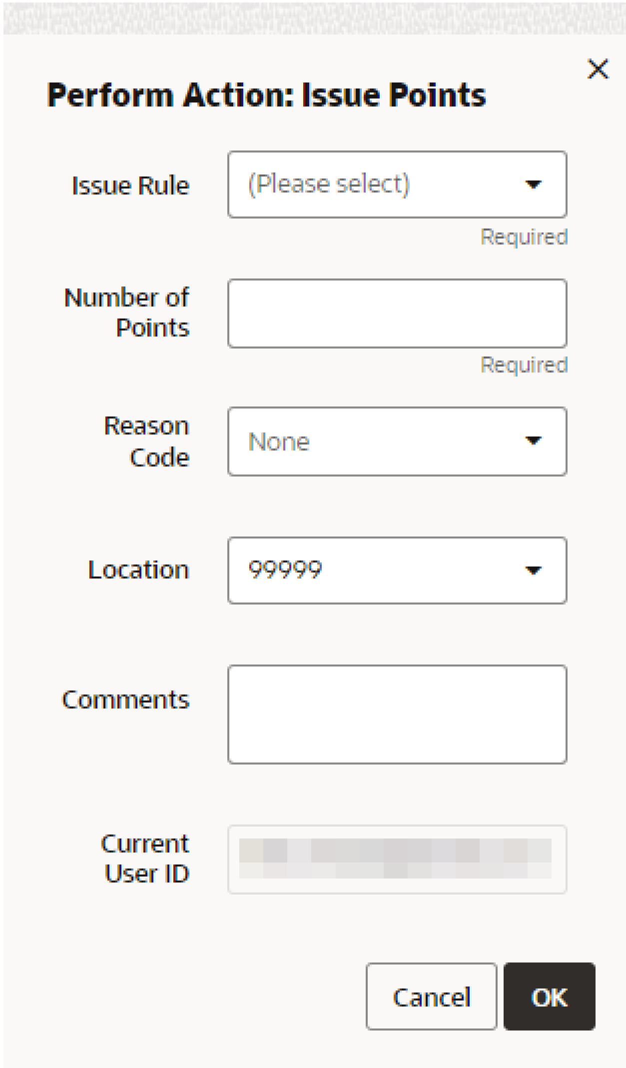
3. Click **OK** to issue the Award and close the Window, or click **Cancel** to close the Window without issuing an Award.

Issue Points

To issue points to a Loyalty Account:

1. Click Issue in the Loyalty Account Actions Menu for a Loyalty Account. A Perform Action: Issue Window opens.

Figure 11-50 Perform Action: Issue Points



2. Enter the information for issuing points:
   - Issue Rule - Use the Selection Menu to select the Loyalty Level Issue Rule to use for issuing the points. The menu includes those rules that belong to the Loyalty Program and Level the account is assigned to.
   - Number of Points - The number of points to issue. For an Issue Rule whose Calculation Type is set to The number of marketing engagements, the Number of Points defaults from the Fixed Amount defined for the rule, but it can be overridden. See Issue Rule of the Programs chapter for background.
   - Reason Code - Use the Selection Menu to select the reason for issuing the points.
   - Location - Use the Selection Menu to select the location where the points are being issued.
   - Comments - Enter any comments describing the points issued.
3. Click **OK** to issue the points and close the Window, or click **Cancel** to close the Window without issuing points.

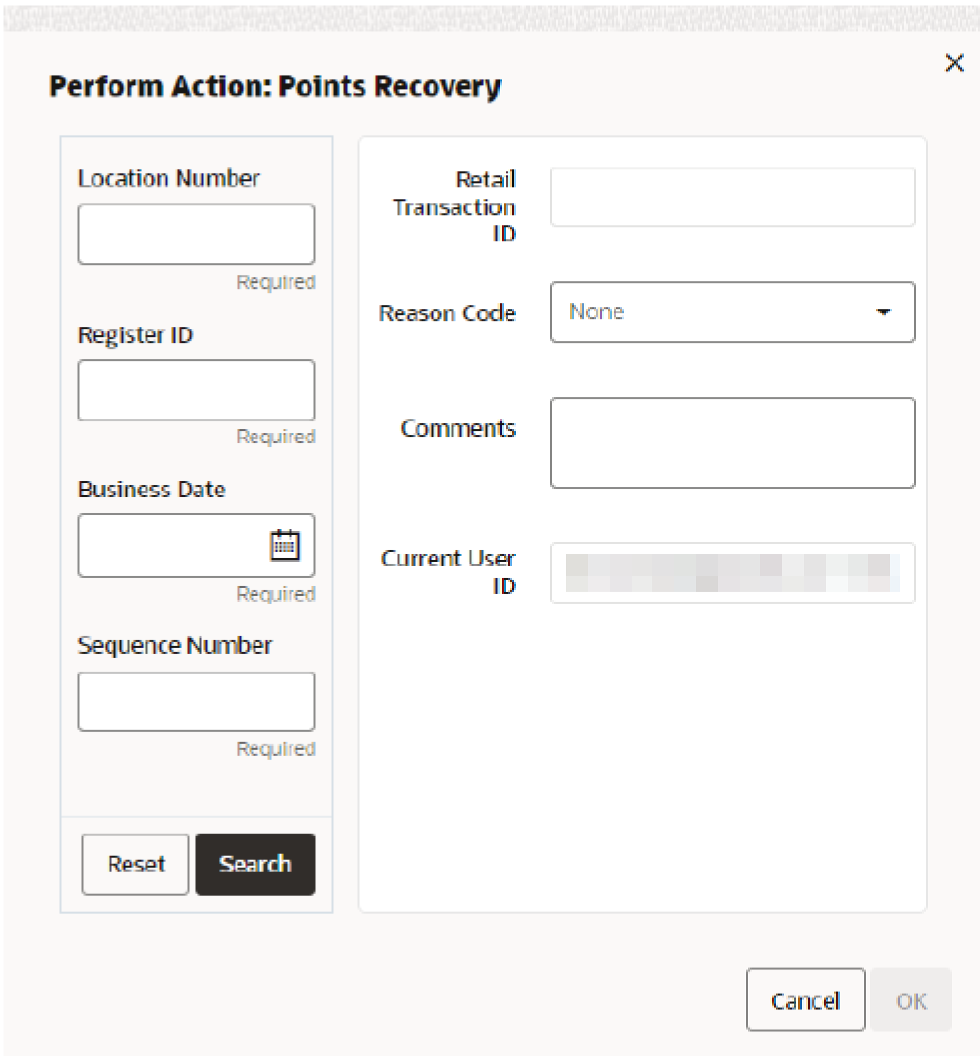
This window does not prevent you from issuing points more often than specified for the Issue Rule when the Calculation Type is set to The number of marketing engagements. See Issue Rule of the Programs chapter for background.

Recover Points

To issue loyalty points that were earned, but not issued to a Customer for a specific transaction:

1. Click **Point Recovery** in the Loyalty Account Actions Menu for a Loyalty Account. A Perform Action: Search for Retail Transaction Window opens.

Figure 11-51 Perform Action: Points Recovery



2. Enter the transaction search information.
   - Location Number - ID number for the location where the transaction was performed.
   - Register ID - ID number for the register where the transaction was performed.
   - Business Date - Use the Calendar Menu to select business date when the transaction was performed.

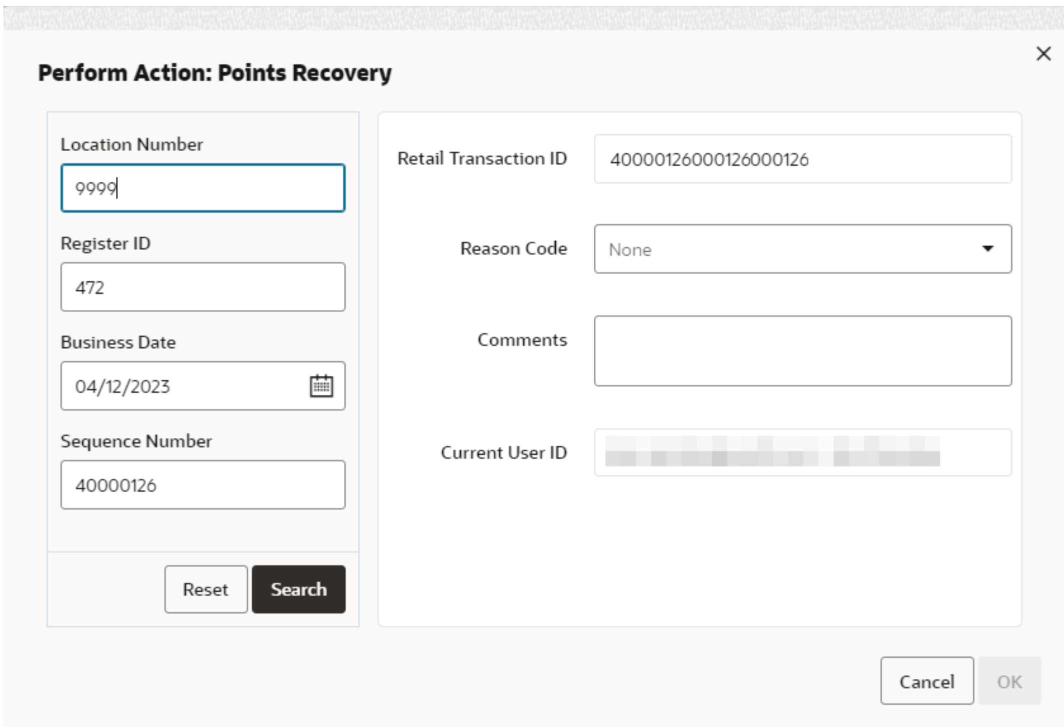
- Sequence Number - The purchase number for the transaction.

> **Note:**
>
> Refer to Figure 11-60 to see the 'Purchase' number that should be used for this field. In a future release, we will likely rename this field to match so there will be no confusion.

3. Click **OK** to search for the transaction and close the window, or click **Cancel** to close the window without searching for the transaction.

   If the transaction is found and the loyalty points have not been processed for that line item, a Perform Action: Point Recovery Window opens.

Figure 11-52 Perform Action: Point Recovery Search Result



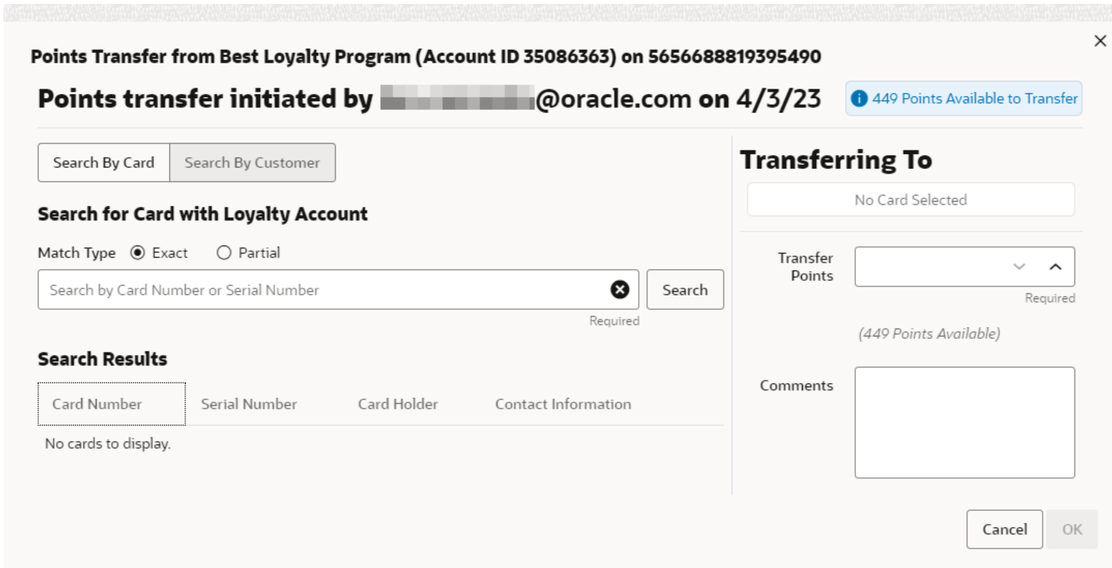
If the transaction is not found, or if the transaction was found, but the loyalty points have already been processed for the transaction, the window will close and an error message will be displayed.

4. Enter the Point Recovery information:
   - Reason Code - Use the Selection Menu to select the reason for performing the point recovery.
   - Comments - Enter any comments describing the point recovery.
5. Click **OK** to recover the points and close the Window, or click **Cancel** to close the Window without recovering the points.

Points Transfer

To transfer points to another Loyalty Account for the same Program, select **Points Transfer** from the Loyalty Account Actions Menu. The Points Transfer page opens.

Figure 11-53 Points Transfer



The information on the Points Transfer page includes.

- Transfer Source Account:
  - Card Number - Card Number for the Card selected for points transfer.
  - Serial Number - Serial Number for the Card selected for points transfer.
  - Card Holder - Customer number and name of the a secondary card holder can also be displayed when searching by customer. If the primary cardholder is displayed, a primary cardholder icon will display next to the name. Click the name to open Customer Record of the card holder in the Customer Dashboard.
  - Card Status - Indicates whether the Card is currently active.
  - Card Holders - Indicates the number of Customers associated with the Card. Click the number of Card Holders to open a menu containing a menu of all of the Customers associated with the Card. Click the name in the menu to open the Customer Record in the Customer Dashboard.
- Loyalty Account Administration
  - Account id - ID number for the Account.
  - Program Name - Name of the Program to which the Account belongs.
  - Loyalty Program Level - The current level of the Loyalty Account.
  - Escrow Points - Number of points currently escrowed in the Account.
  - Earned Points - Current points balance of the Account.
  - Program Currency - Base currency for the Program.

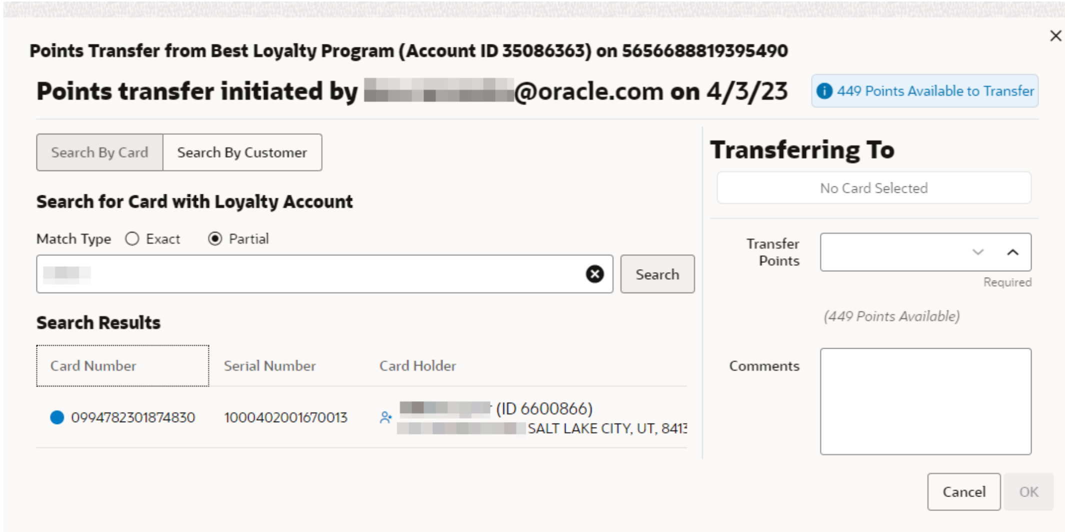
- Year To Date Points - Number of points earned by the Account in the current year to date.
- Lifetime Points - Number of points earned by the Account during the lifetime of the Account.
- First Used Date - Date of the first activity for the Loyalty Account.
- Last Activity Date - Date of the most recent activity for the Loyalty Account.
- Expiration Date - Date, if any, when the Loyalty Account is scheduled to expire.

- Customer Contact Permissions: The originating Customer can be notified of the transfer by an email or SMS message generated by an integrated marketing system, such as Responsys, if the Customer's contact permissions allow email or phone contact and if the marketing system supports it. See Points/Awards Transfer Notification Export for background.
  - Contact Preference - Indicates the preferred means for contact for the Customer, such as Email or Phone.
  - Email - The Customer's primary email address. Included if email is a preferred means of contact.
  - Phone - The Customer's primary phone number. Included if phone is a preferred means of contact.
  - The Email or Phone listed is None if the contact information is not available, indicating that no email or SMS message can be generated. Also, even when the Customer has provided the email address or phone number, the Email Address or Phone is listed as None if the Contact Permission is set to No.

Process

1. To add a card do the following:
   - Using Search by Card
     - In the Search for Card with Loyalty Account, enter the **Card Number** or **Serial Number** of the Card you want to search for. Click **Partial** to search for Cards that partially match the search text, or click **Exact**, to search for an exact match.
   - Using Search By Customer
     - In the Search By Customer field, enter the **Customer Name**, **ID**, **Email Address**, or **Phone Number** of the Customer you want to search for. Click **Partial** to search for Customers that partially match the search text, or click **Exact**, to search for an exact match.
2. Click **Search**. The Search Results appear.

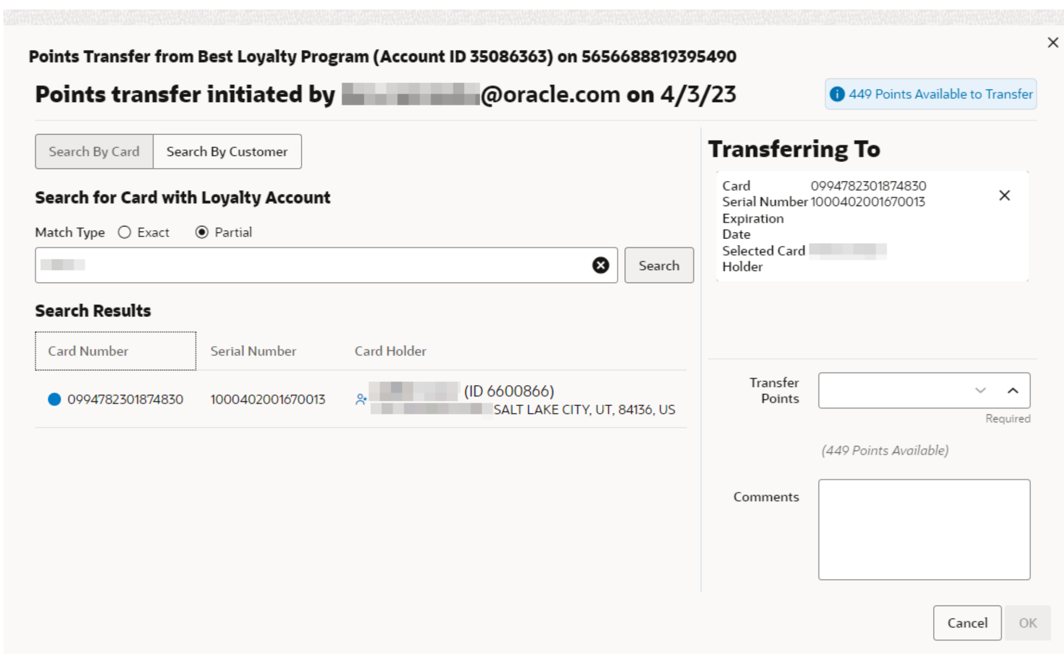
Figure 11-54 Search Results



The Account must be within the same Program, and the Customer must be the primary card holder. Only active Cards can receive points.

3. Click **Select** to populate the Transferring To section.

Figure 11-55 Transferring To



- Card - Card Number for the Card. If the selected Customer has more than one Card in the Program, the most recently used Card is selected and displayed.
- Serial Number - Serial Number for the Card.

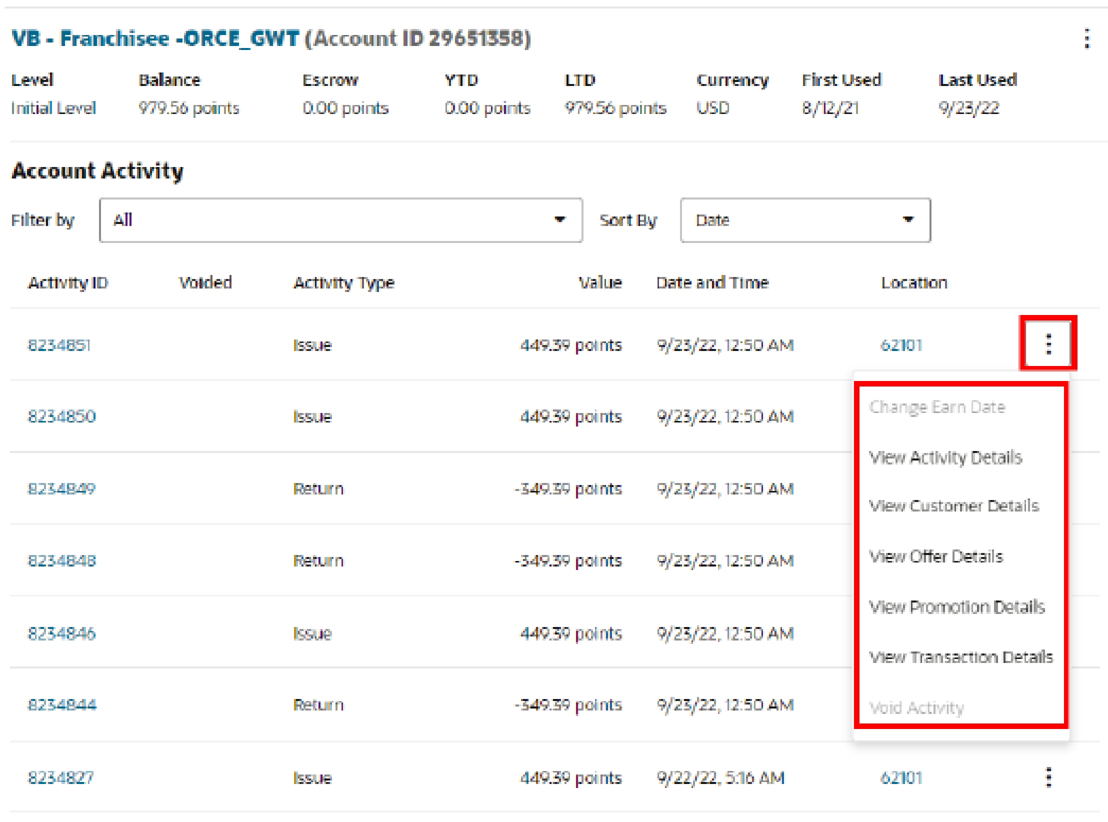
- Primary Card Holder - Customer name of the primary account holder.
- Selected Card Holder - Customer name of the selected card holder.
- Loyalty Level - The current loyalty level.
- Current Balance - Current balance on the card.

4. Enter the Number of points to transfer. Your entry cannot exceed the Earned Points balance for the Transfer Source Account.
5. Enter any **Comments**.
6. Click **OK** to transfer the points, or click **Cancel** to close the window without saving.

The Points are transferred to the Destination Account. A Transfer In Activity Detail record is created for the Destination Account, and a Transfer Out Activity Detail record is created for the Source Account.

Loyalty Account Activity Actions Menu

Figure 11-56 Loyalty Account Activity Actions Menu



The Actions Menu for Loyalty Accounts Account Activity List displays the following options:

- **Change Earn Date** - Changes the date the escrowed points will be moved to earned.
- **View Activity Details** - Views the details of the selected activity.
- **View Customer Details** - Views the details of the selected customer.

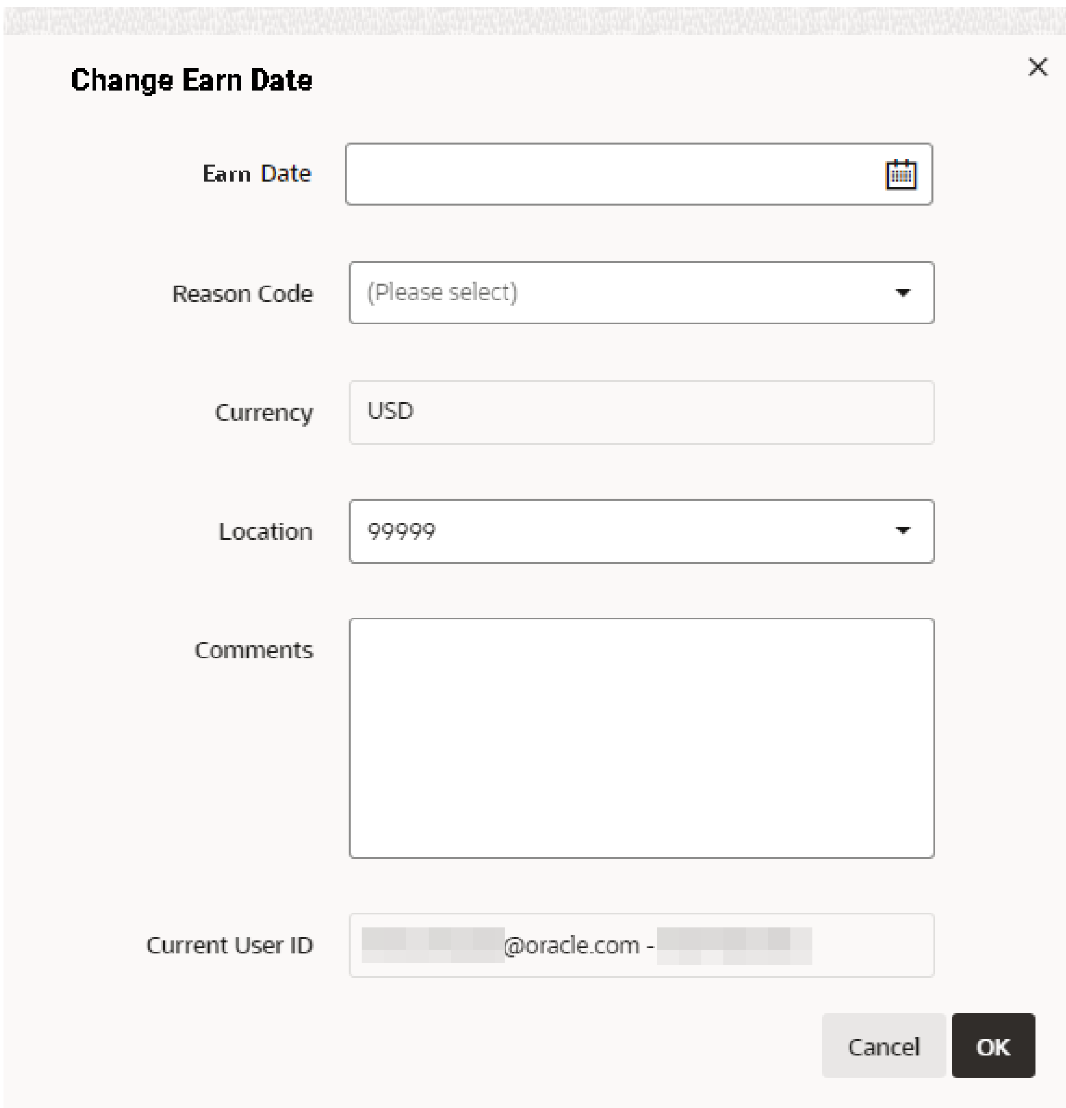
- **View Promotion Details** - Views the details of the promotion associated to the activity. This menu option will only display when there is an associated promotion.
- **View Offer Details** - Views the details of the offer associated to the activity. This menu option will only display when there is an associated offer.
- **View Transaction Details** - Views the details of the selected transaction.
- **Void Activity** - Voids the selected activity

Change Earn Date

Perform the following actions to change the date the escrowed points will be moved to earned.

1. In the Account Activity area, click the **Action** menu for the desired activity.
2. Click Change Earn Date. The Change Earn Date window displays.

Figure 11-57 Change Earn Date



3. Enter the following information:

- Earn Date
- Reason Code
- Location
- Comments

4. Click **OK** to change the earn date, or click **Cancel** to close the window without saving.

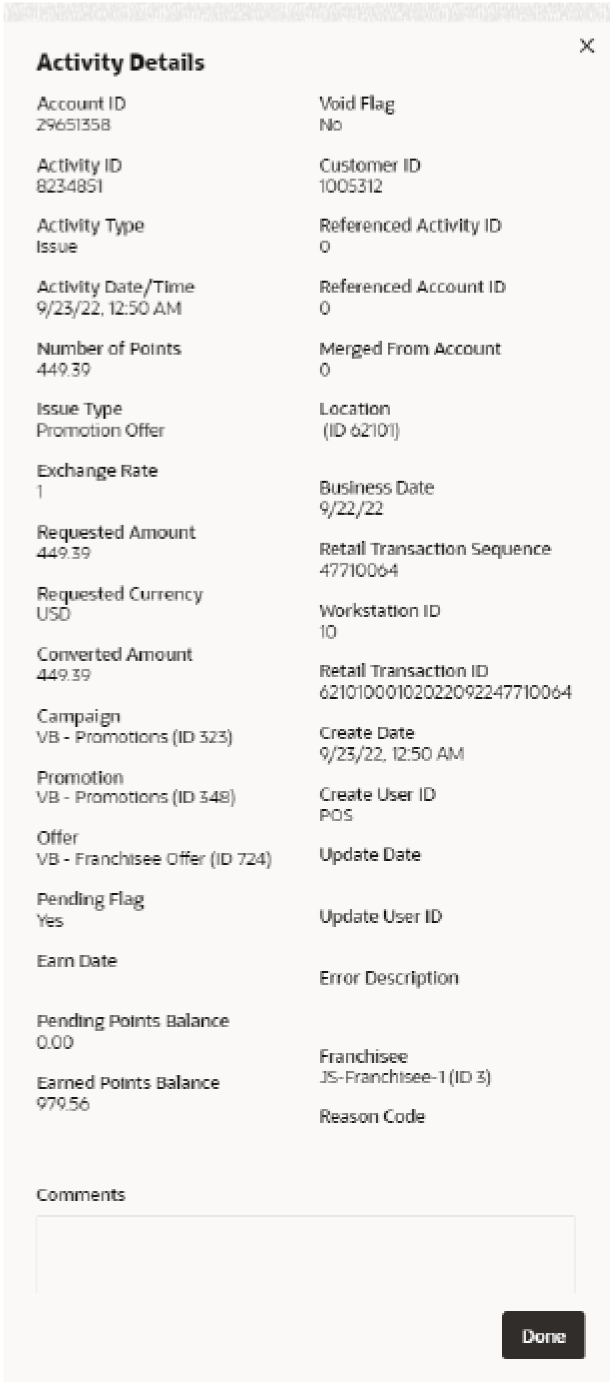
> **Note:**
>
> A notification appears indicating the request was a success.

View Activity Details

Do the following to view detailed information about an activity in the list of activities displayed for a Loyalty Account:

1. In the Account Activity area, click the **Action** menu for the desired activity.
2. Click **View Activity Details**. The Activity Details display.

Figure 11-58 Activity Details - Loyalty Account



3. The Activity Detail Window displays the following information for the selected activity:
   - Account ID - ID number for the Account associated with the activity.
   - Activity ID - ID of the activity on the Account.
   - Activity Type - Type of activity performed.
   - Activity Date/Time - Date and time of the activity.
   - Number of Points - Number of points applied to the points balance, or subtracted in the case of an activity such as Change Level or Transfer Out.

- Issue Type - The issue type of the tender.
- Exchange Rate - If the transaction was performed in a foreign currency, the exchange rate between the foreign currency and the Account's base currency.
- Requested Amount - Requested currency amount.
- Requested Currency - Currency used for the requested amount, if different from the base currency.
- Converted Amount - Amount of the request in the system's base currency
- Campaign - If the activity was associated to points awarded in a campaign, this field will be displayed and is the Name and ID of the campaign the award was from.
- Promotion - If the activity was associated to points awarded in a promotion, this field will be displayed and is the Name and ID of the promotion the award was from.
- Offer - If the activity was associated to points awarded in an offer, this field will be displayed and is the Name and ID of the offer the award was from.
- Earn Date - Date a pending activity will complete.
- Pending Points Balance - Number of points pending at the time of the activity.
- Earned Points Balance - Earned points balance at the time of the activity
- Void Flag - Indicates whether the activity was voided.
- Referenced Activity ID - ID of an activity to which this activity refers.
- Referenced Account ID - ID of the Loyalty Account used by the Referenced Activity
- Merge From Account - If two cards have been merged, the originating source account is displayed.
- Location ID - ID of the Location where the activity was performed.
- Location Name - Name of the Location where the activity was performed.
- Business Date - Business date of the activity.
- Retail Transaction Sequence - Sequence number of the activity on the retail transaction
- Workstation ID - ID of the workstation (within the Location) where the activity was performed.
- Retail Transaction ID - ID number of the activity within a retail transaction.
- Create Date - Date when the activity was created.
- Create User ID - ID of the user who created the activity.
- Update Date - Date when the activity was most recently updated.
- Update User ID - ID of the last user to update the activity.
- Error Description - If an error occurred during the activity, a description of the error.
- Franchisee - Franchisee associated with the activity.
- Reason Code - Reason for the activity.
- Comments - Additional comments entered about the activity.

4. Click **Done** to close the window.

View Customer Details

Do the following to view the customer details.

1. In the Account Activity area, click the **Action** menu for the desired activity.
2. Click View Customer Details. The Customer Dashboard displays in a new tab. See Customer Dashboard to see more information.
3. Click **x** to close the Customer Dashboard.

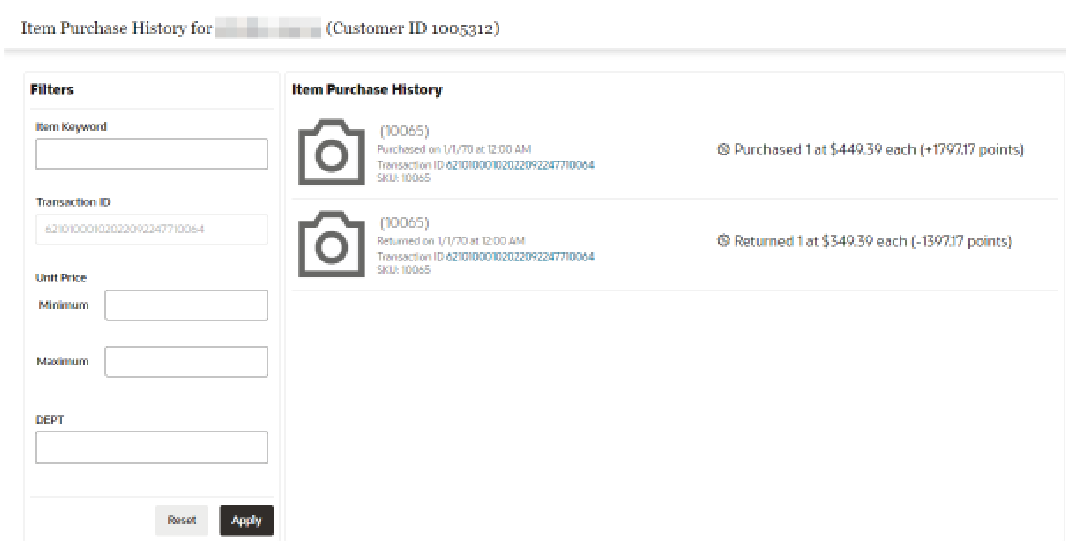
View Transaction Details

Do the following to view the transaction details.

1. In the Account Activity area, click the **Action** menu for the desired activity.
2. Click **View Transaction Details**. The Item Purchase History for the transaction displays.

> **Note:**
>
> This is in the Customer Feature as well and can be accessed from the Customer Dashboard. See Item Purchase History for more information.

Figure 11-59 Item Purchase History



3. The Item Purchase History can be filtered using the following options:
   - Item Keyword - Enter any part of the Item name.
   - Unit Price Min - Enter the Min Unit Price
   - Unit Price Max - Enter the Max Unit Price
   - Department - Enter any part of a department name. The list updates automatically with the matching departments.
4. Click the **Item Name** to view the Item Details.
5. Click **Done** to close the Item Details window.
6. Click the **Transaction ID** to view the Purchase Details as shown in Figure 11-60, Figure 11-61, and Figure 11-62.

Figure 11-60 Purchase Information

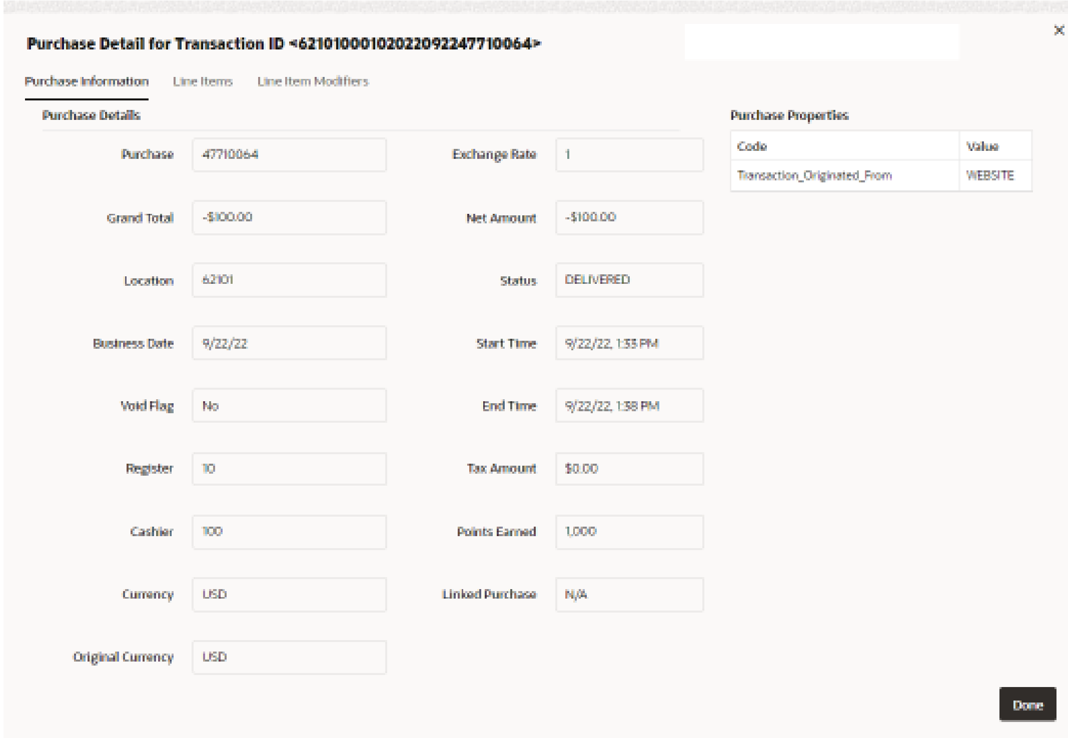


Figure 11-61 Line Items

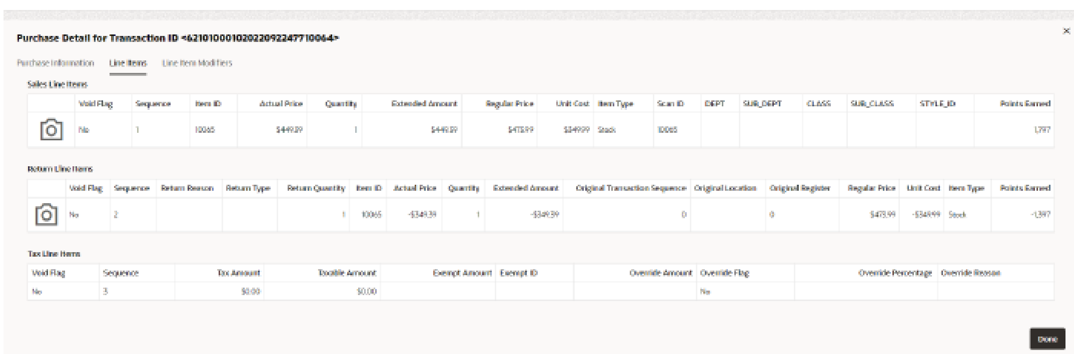
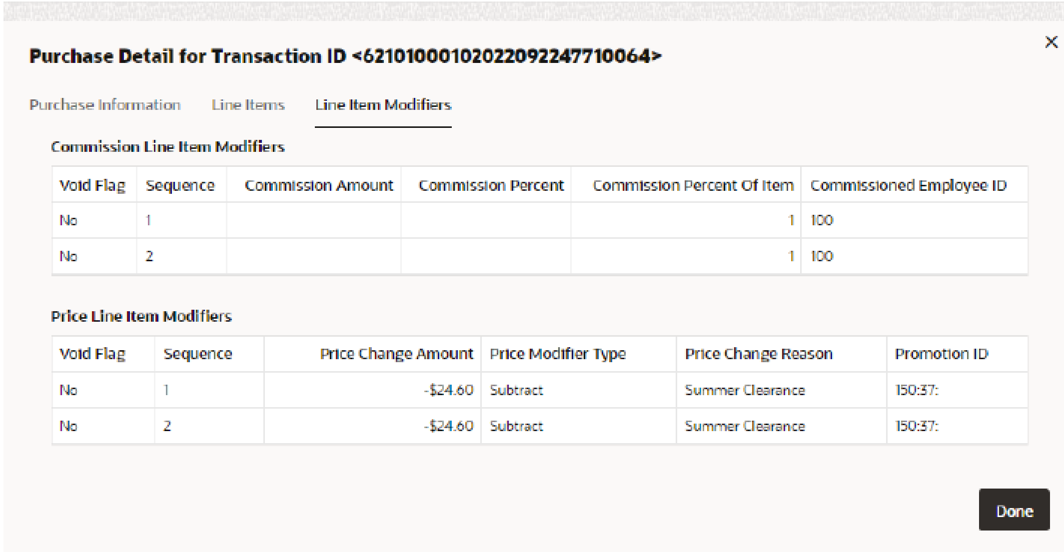


Figure 11-62 Line Item Modifiers



Purchase Detail for Transaction ID <62101000102022092247710064>

Purchase Information | Line Items | Line Item Modifiers

Commission Line Item Modifiers

Void Flag	Sequence	Commission Amount	Commission Percent	Commission Percent Of Item	Commissioned Employee ID
No	1			1	100
No	2			1	100

Price Line Item Modifiers

Void Flag	Sequence	Price Change Amount	Price Modifier Type	Price Change Reason	Promotion ID
No	1	-$24.60	Subtract	Summer Clearance	150:37:
No	2	-$24.60	Subtract	Summer Clearance	150:37:

Done

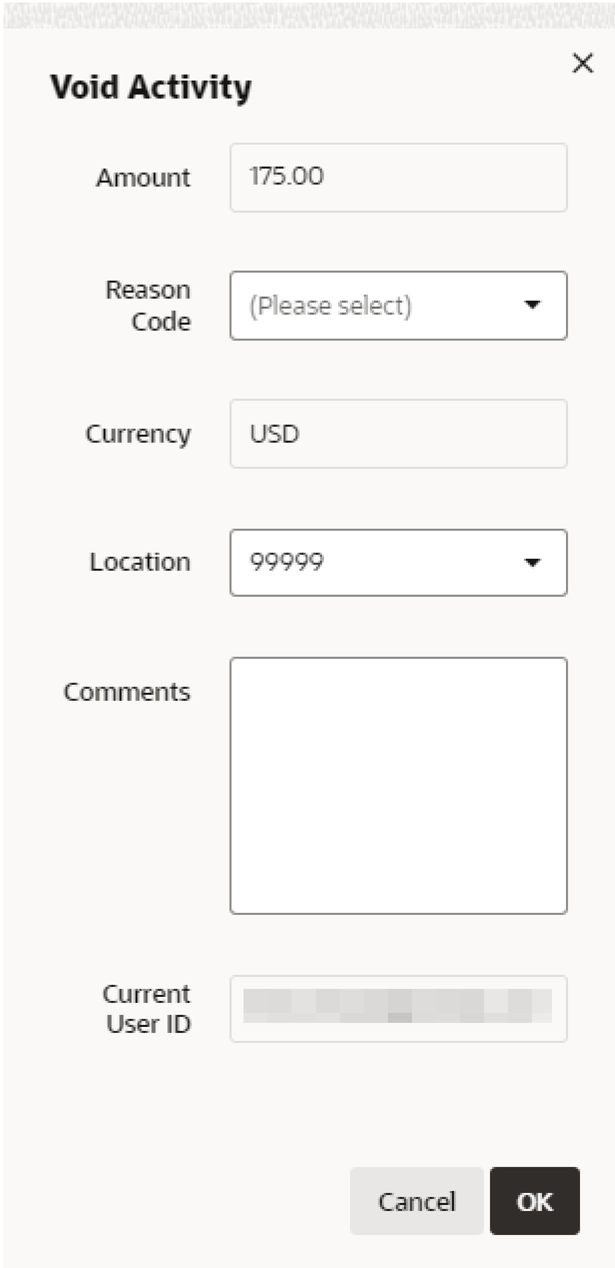
7. Click **Done** to close the Transaction ID views.
8. Click **x** to close the Customer Dashboard.

Void Activity

To void an activity do the following:

1. In the Account Activity area, click the **Action** menu for the desired activity.
2. Click **Void Activity**. The Void Activity window displays.

Figure 11-63 Void Activity



3. Enter the following information:
    - Reason Code
    - Location
    - Comments
4. Click **OK** to void the activity, or click **Cancel** to close the window without saving.

12 Job Management

In Customer Engagement, Job Management is used to view and edit Jobs scheduled to be run in Customer Engagement.

Available Jobs are based on the organization when logged into system.

About this Chapter

This chapter contains the following information:

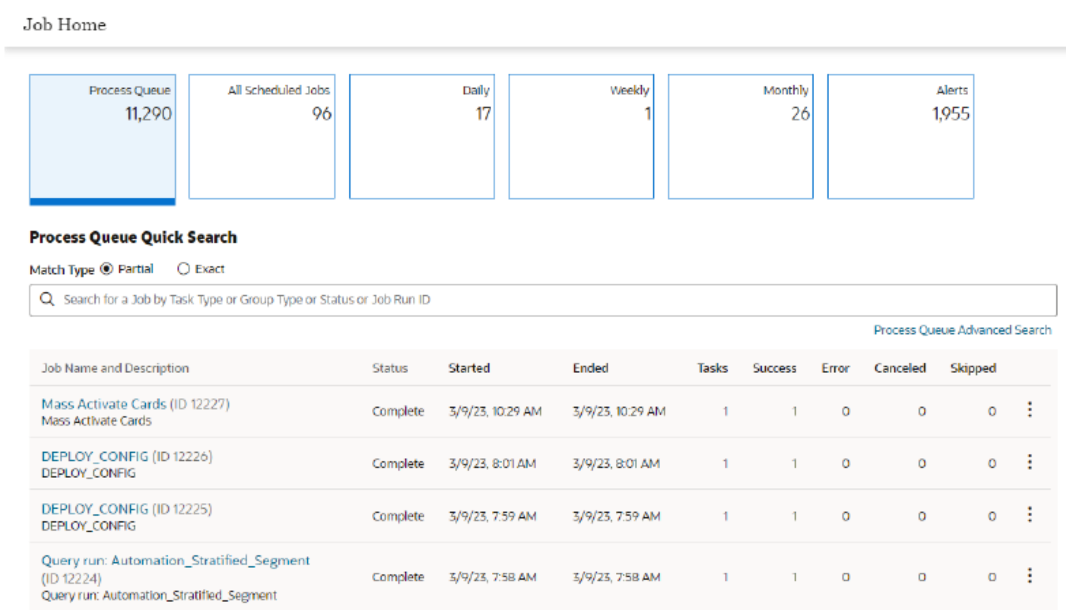
- Job Quick Search
- Job Advanced Search
- Viewing a Scheduled Job
- Creating a Scheduled Job
- Editing a Job
- Deleting a Job
- Disabling a Job
- Enabling a Job
- Running a Job Immediately
- Viewing a Job in Process Queue
- Jobs and Tasks
- Configure Job Parameters

Job Quick Search

Job Quick Search displays a list of results as you type in characters in the search box. To use the Job Quick Search do the following:

1. Click the **Menu** icon.
2. Click **Job Management**.
3. Click **Job Home**. The Job Management window opens.

Figure 12-1 Job Management - Process Queue Tile



4. Select a Metric Tile, options include:
   - Process Queue
   - All Scheduled Jobs
   - Daily
   - Weekly
   - Monthly
   - Alerts

Job Quick Search - Process Queue and Alerts Tiles

These tiles display the following information for each job.

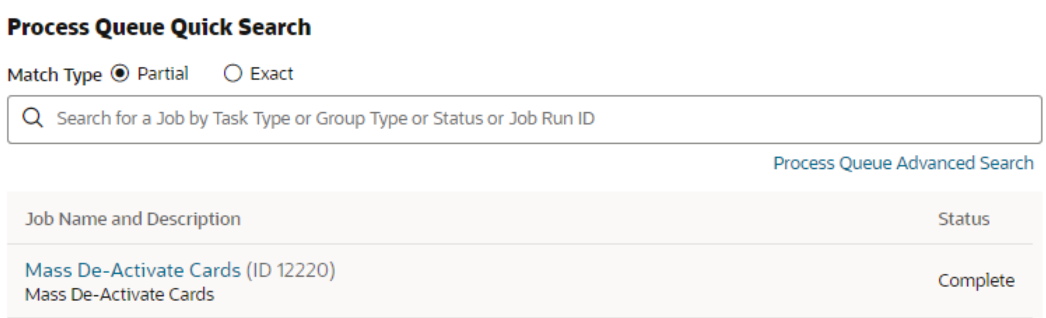
- Name and Description - Name and Description of the Job.
- Job Run ID - ID Number of the Job.
- Status - Current status of the Job.
- Started - The date and time at which the Job started running.
- Ended - The date and time at which the Job stopped running.
- Tasks - The number of Tasks performed by the Job.
- Success - The number of Tasks completed successfully by the Job.
- Error - The number of Tasks in the Job that resulted in an Error.
- Canceled - The number of Tasks in the Job that were canceled.
- Skipped - The number of Tasks in the Job that were skipped, possibly because an error occurred in a previous task.

Perform the following steps to search for a Job:

1. Click the **Process Queue** or **Alerts** tile.

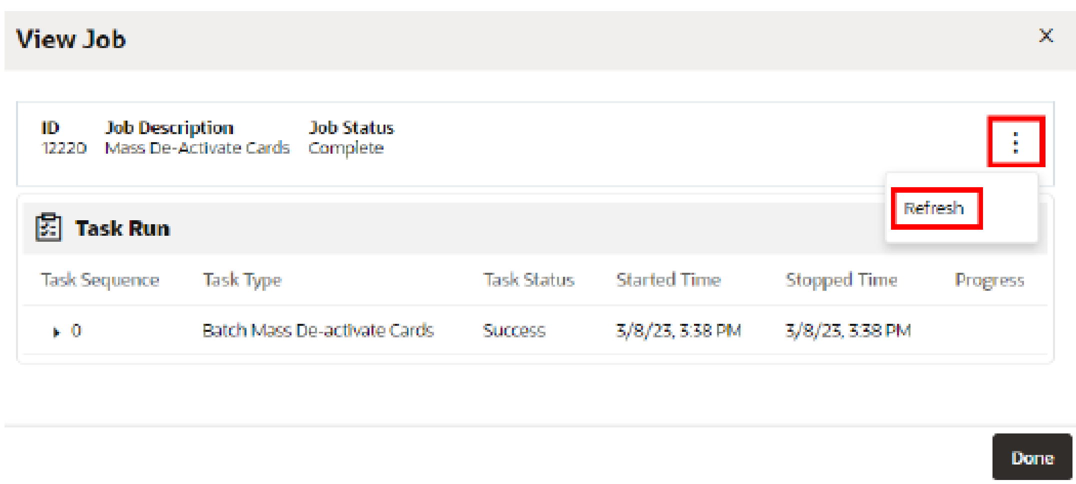
2. In the Search for a Job field, enter the **Task Type**, **Group Type**, **Status** or **Job ID** of the Job you want to search for. Select **Partial** to search for Jobs that partially match the search text, or select **Exact**, to search for an exact match.

Figure 12-2 Process Queue Quick Search Results



3. Click the **Name** which appears as a link for any Job to open the Job Details. See Viewing a Job in Process Queue for more information. Click the **Action Menu** to Refresh the Task Run details.

Figure 12-3 Action Menu Options - Quick Search

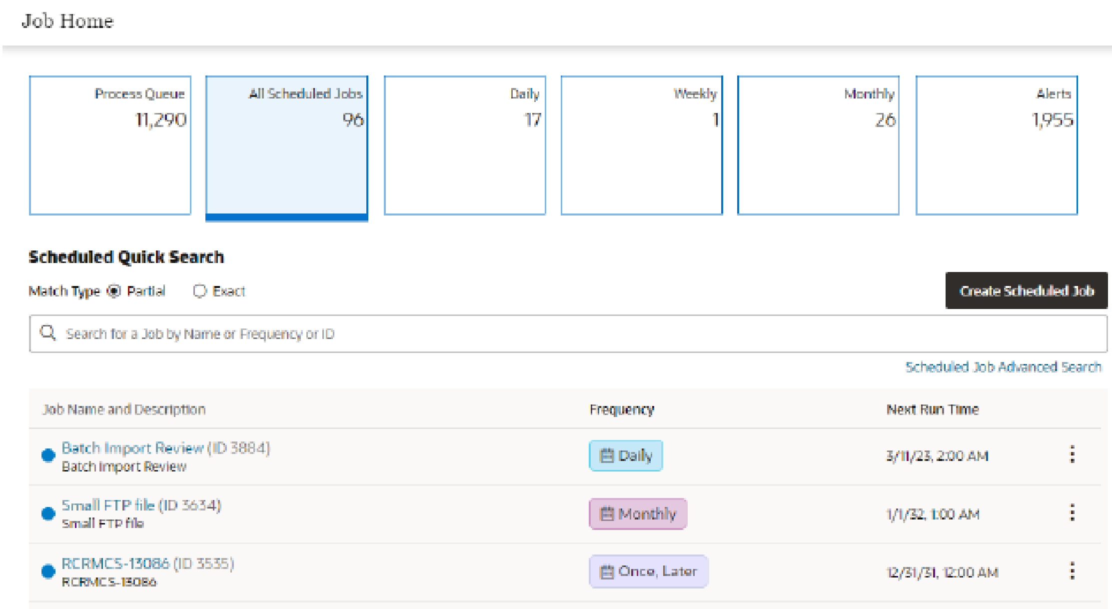


Job Quick Search - Job Scheduling Tiles

Scheduled Jobs are a list of Jobs that are configured to be run by the system. They include the following tiles:

- All Scheduled Jobs
- Daily
- Weekly
- Monthly

Figure 12-4 Job Home - All Scheduled Jobs Tile



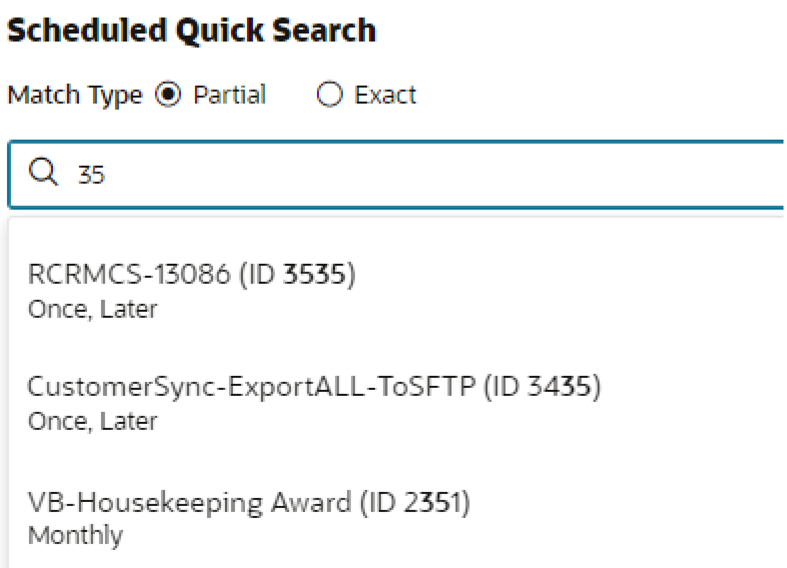
The Job Scheduling Tiles displays the following information for each Job:

- Job Status - Indicates whether the Job is currently enabled. A full circle indicates the Job is active. An empty circle indicates the job is inactive.
- Name and Description - Name and Description of the Job.
- ID - ID Number of the Job.
- Frequency - The frequency at which the Job is performed.
- Next Run Time - The Time at which the Job is run next.

Perform the following steps to search for a Job.

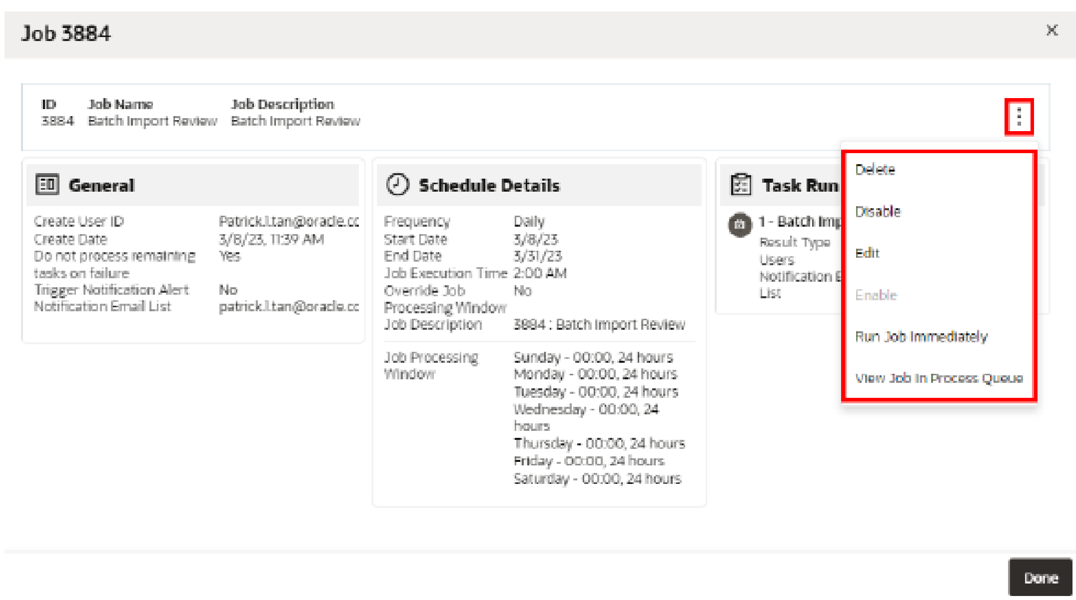
1. Click the **All Scheduled Jobs**, **Daily**, **Weekly**, or **Monthly** tile.
2. In the Search for a Job field, enter the **Name**, **Frequency**, or Viewing a Job in Process Queue of the Job you want to search for. Select **Partial** to search for Jobs that partially match the search text, or select **Exact**, to search for an exact match.

Figure 12-5 Jobs Scheduling Quick Search Results



3. Click the **Name** which appears as a link for any Job to open the Job Details. See Viewing a Scheduled Job for more information. Click the **Action Menu** to Delete, Disable, Edit, Enable, Run Job Immediately, or View Job in Process Queue.

Figure 12-6 Action Menu Options - Quick Search



Job Advanced Search

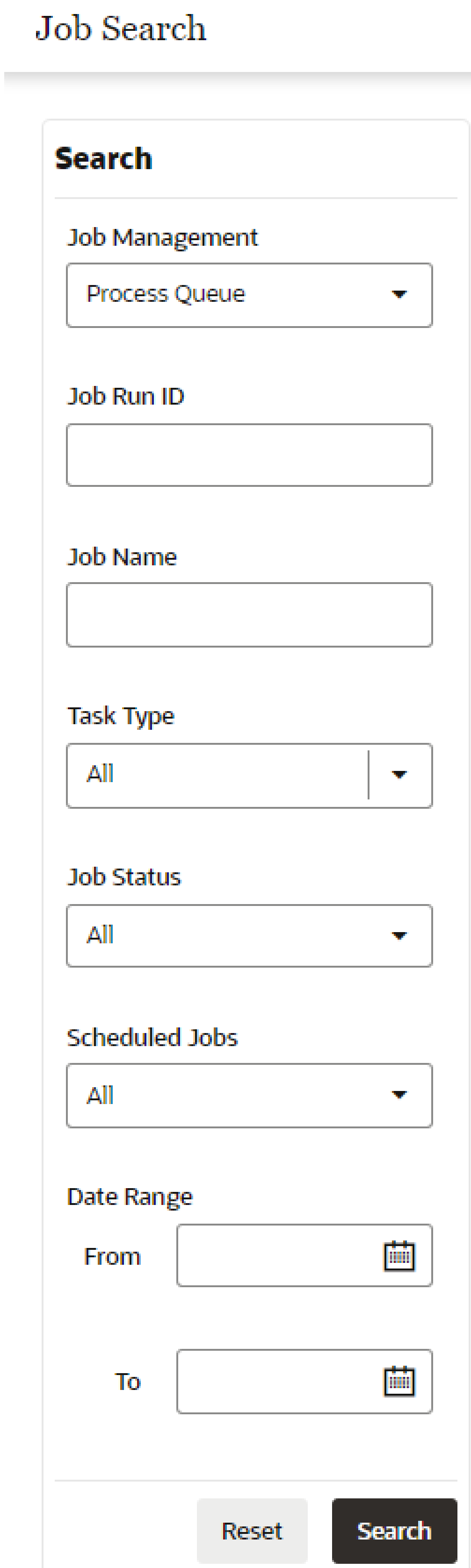
The Job Advanced Search allows you to select more criteria that are not available in the Job Quick Search box. The Job Advanced Search is accessed by the following methods:

- Click the **Advanced Search** link underneath the Job Quick Search box in the Job Home window.

- Click **Job Search** in the Job Management menu. See Navigation for more information.

Job Advanced Search - Process Queue

Figure 12-7 Job Advanced Search - Process Queue

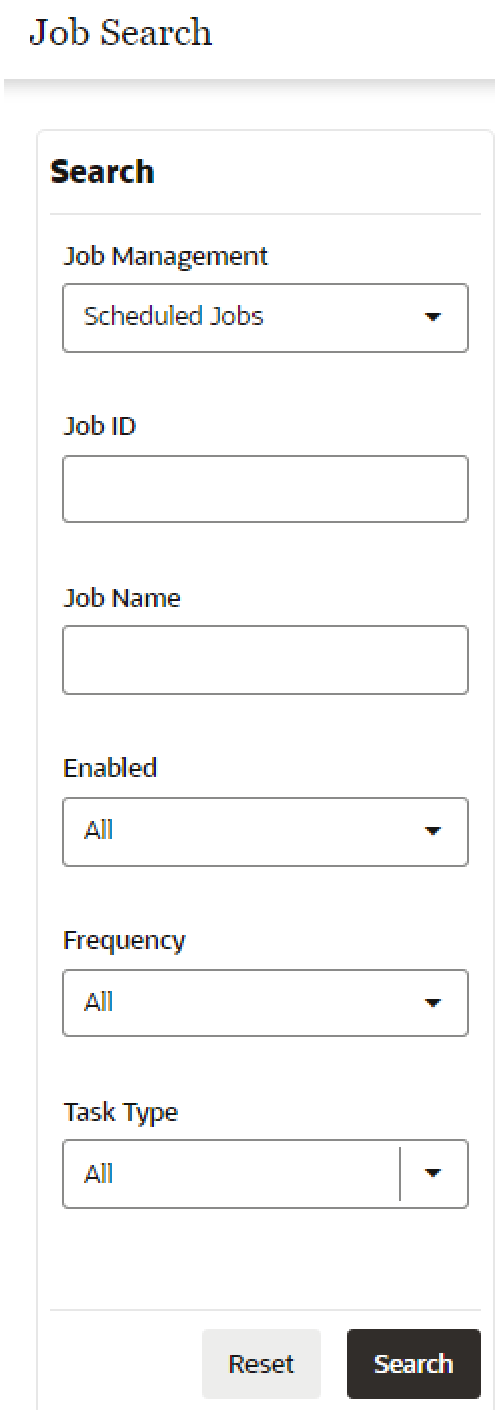


The following search fields are available when **Job Management** is set to **Process Queue**:

- Job Run ID
- Job Name
- Task Type - The type of task. The values in this Selection menu depend upon configuration. See the *Oracle Retail Customer Engagement Implementation Guide* for information about configuring custom task types.
- Job Status
  - All Default
  - Pending
  - Running
  - Complete
  - Failed
  - Skipped
  - Abnormal Termination
- Scheduled Jobs
- Date Range
  - From - Click the Calendar icon to select the beginning Month and Day of the date range
  - To - Click the Calendar icon to select the ending Month and Day of the date range

Job Advanced Search - Scheduled Jobs

Figure 12-8   Job Advanced Search - Scheduled Jobs



The following search fields are available when **Job Management** is set to **Scheduled Jobs**:

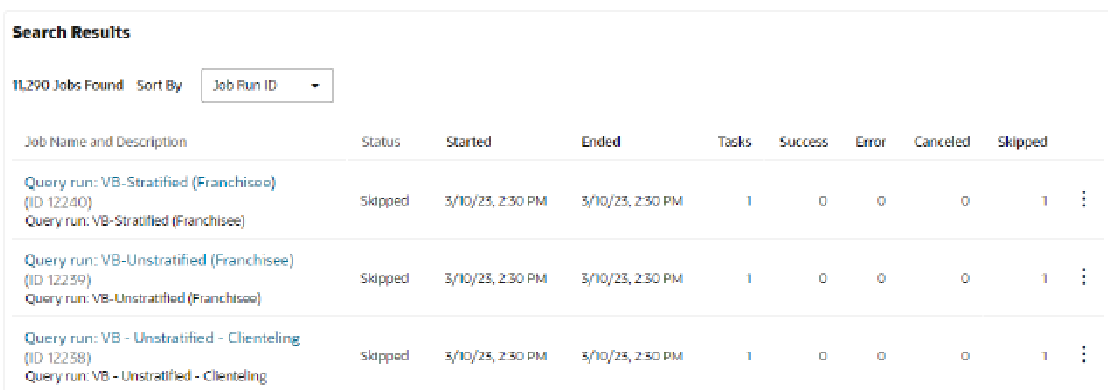
- Job ID

- Job Name
- Enabled
  - All - Default
  - Yes
  - No
- Frequency
  - All - Default
  - Once, Immediately
  - Once, Later
  - Daily
  - Daily, Business Days Only
  - Weekly
  - Monthly
- Task Type - The type of task. The values in this Selection menu depend upon configuration. See the *Oracle Retail Customer Engagement Implementation Guide* for information about configuring custom task types.

Searching Jobs

Once all the desired information has been entered, click **Search** to see the results.

Figure 12-9 Advanced Search Results - Process Queue

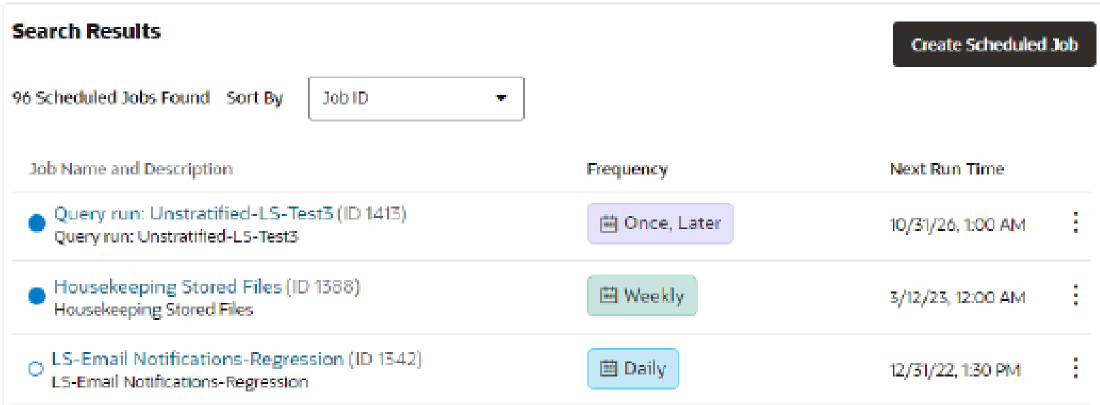


Search Results

11,290 Jobs Found Sort By Job Run ID

Job Name and Description	Status	Started	Ended	Tasks	Success	Error	Canceled	Skipped
Query run: VB-Stratified (Franchisee) (ID 12240) Query run: VB-Stratified (Franchisee)	Skipped	3/10/23, 2:30 PM	3/10/23, 2:30 PM	1	0	0	0	1
Query run: VB-Unstratified (Franchisee) (ID 12239) Query run: VB-Unstratified (Franchisee)	Skipped	3/10/23, 2:30 PM	3/10/23, 2:30 PM	1	0	0	0	1
Query run: VB - Unstratified - Clienteling (ID 12238) Query run: VB - Unstratified - Clienteling	Skipped	3/10/23, 2:30 PM	3/10/23, 2:30 PM	1	0	0	0	1

Figure 12-10 Advanced Search Results - Scheduled Jobs



Note:

Click **Reset** to clear all fields and return list values to the default selections. You can also click **Search** without entering any criteria to see a complete list of Jobs.

Sorting Job Results

The sort options will re-sort just the current 25 jobs displayed in the window. Sorting options include:

Process Queue

- Job Run ID - Default
- Last Run
- Status
- Tasks
- Success
- Error
- Canceled
- Skipped

Scheduled Jobs

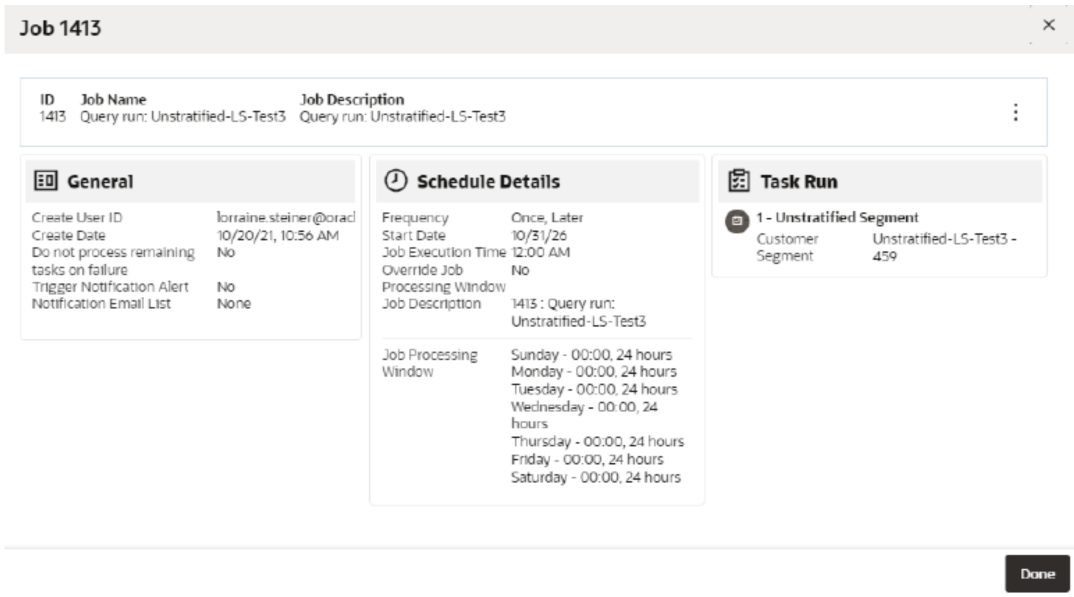
- Job ID - Default
- Job Name
- Frequency
- Next Run Time

Viewing a Scheduled Job

To view a scheduled job:

1. Search for a **Job**. See Job Quick Search or Job Advanced Search.
2. For the Job you want to view, click the **Action Menu**.
3. Click **View**. The Job opens.

Figure 12-11 Job View



4. Click **Done** to return to the Scheduled Job List.

> **Note:**
>
> To use the available options in the Action Menu, see Deleting a Job, Disabling a Job, Editing a Job, Enabling a Job, Running a Job Immediately, or Viewing a Job in Process Queue.

Creating a Scheduled Job

There are a two choices available to start the process of creating a Scheduled Job. Access the Create Scheduled Job button from either:

- Job Home
- Job Search

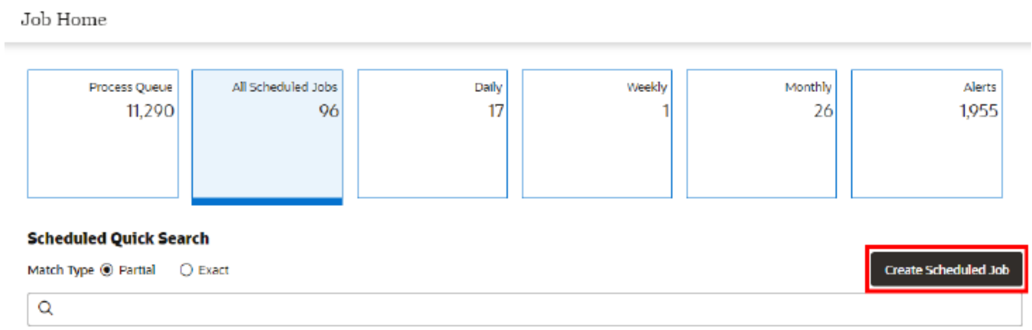
1. To access the Create Scheduled Job wizard: Proceed to **Step 2**.

   Or use this alternate method:

   To Create a new Scheduled Job from Job Search: Click the **Create Scheduled Job** button, which will open the Scheduled Job wizard on the Information tab. .

   a. From Job Home, click **Create Scheduled Job** which opens the Schedule Job Wizard on the information tab. Proceed to **Step 2**

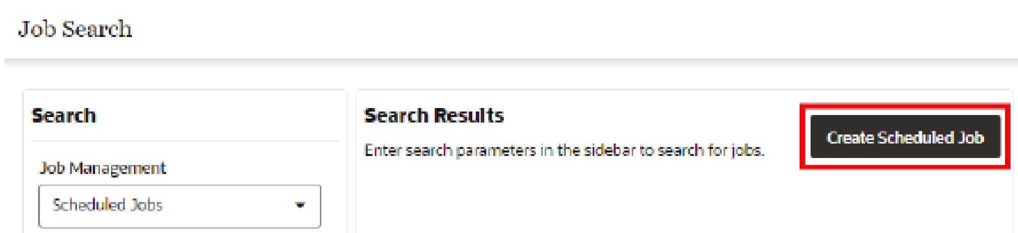
Figure 12-12 Job Home



> **Note:**
>
> To access the Create Scheduled Job button, you must select either the All Scheduled Jobs, Daily, Weekly, or Monthly tile.

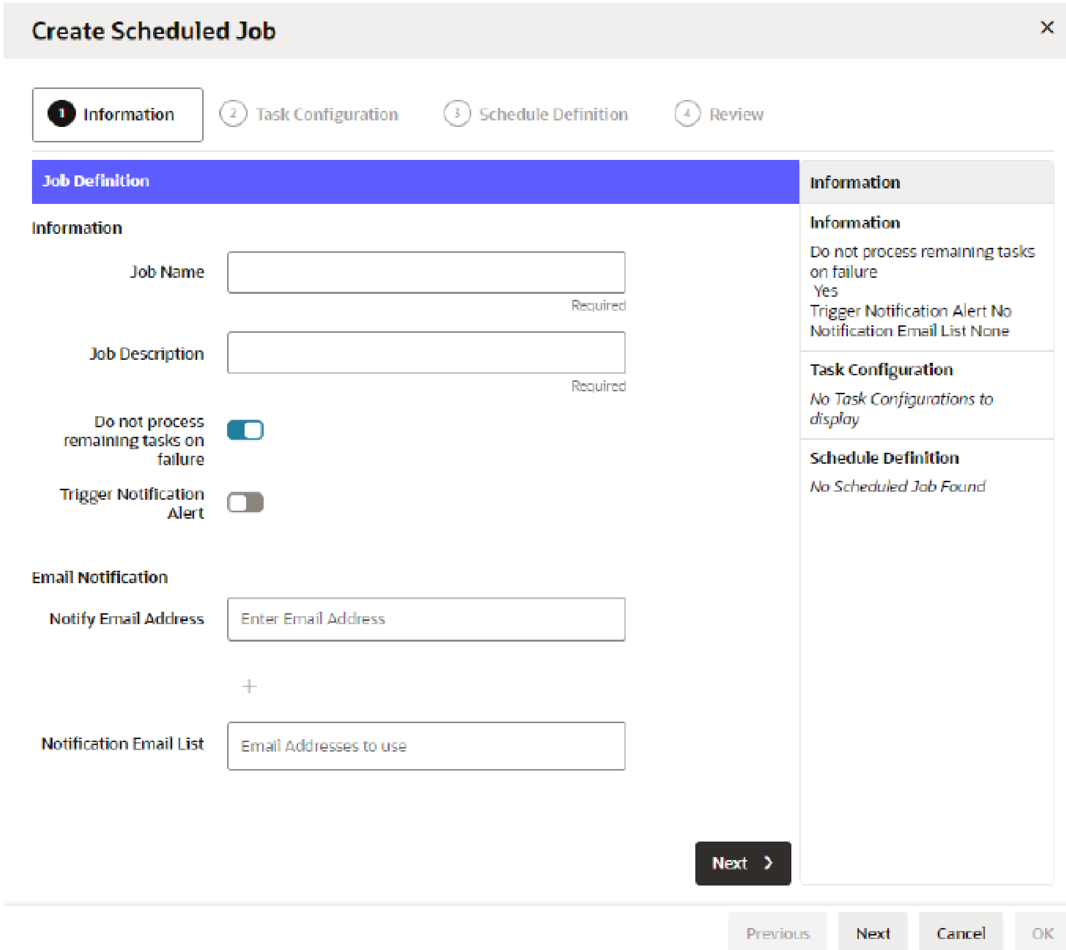
b. From Job Search, click **Create Scheduled Job** which opens the Scheduled Job wizard on the Information tab. Proceed to **Step 2**

Figure 12-13 Job Search



2. Enter the following for the **Information** tab.

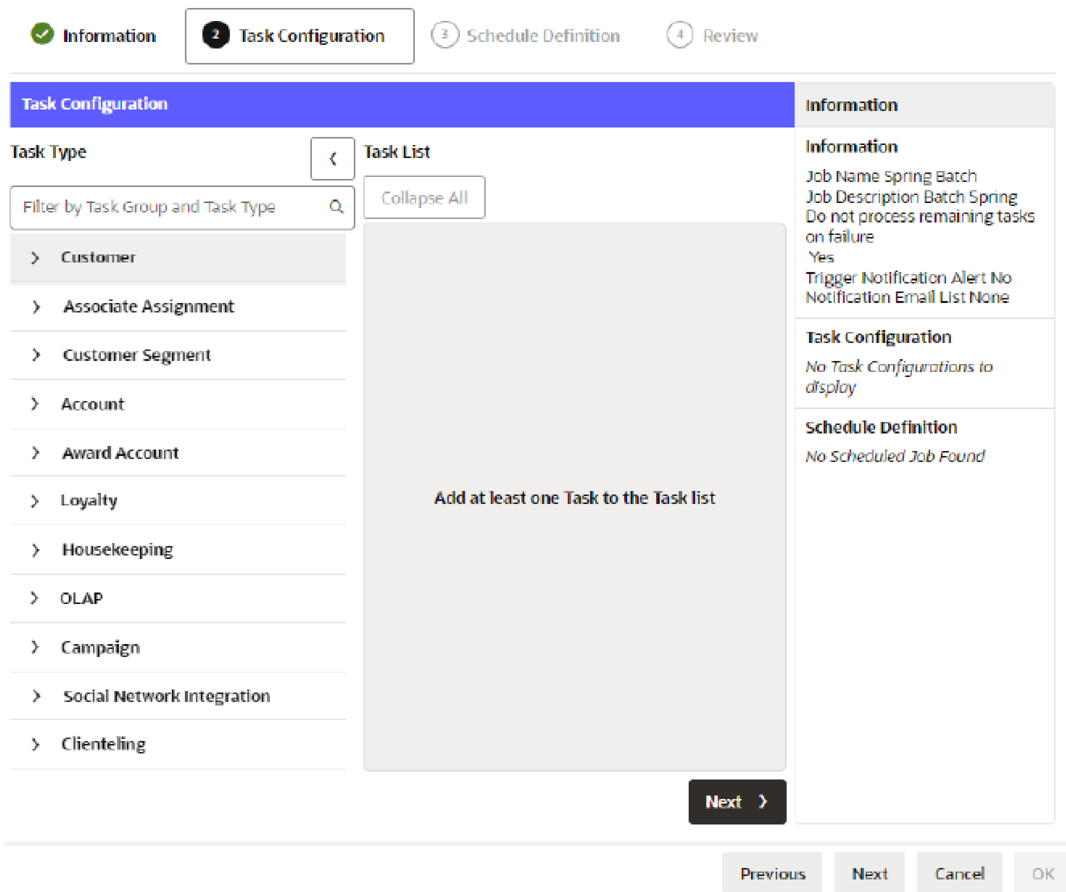
Figure 12-14 Information Tab



- Job Name (required)
- Job Description (required)
- Do Not Process Remaining Tasks on Failure - Default is **ON**.
- Trigger Notification Alert - Toggle to **ON** to set up an alert that notifies users to items needing their attention when creating a scheduled job to be run in Customer Engagement. See Notifications for more information.
- Notify Email Address - Enter one or more email addresses using the **Plus** icon to move each email address to the Notification Email List.
- Notification Email List - This field populates as email addresses are entered.

3. Click **Next** to continue to the **Task Configuration** tab.

Figure 12-15 Task Configuration



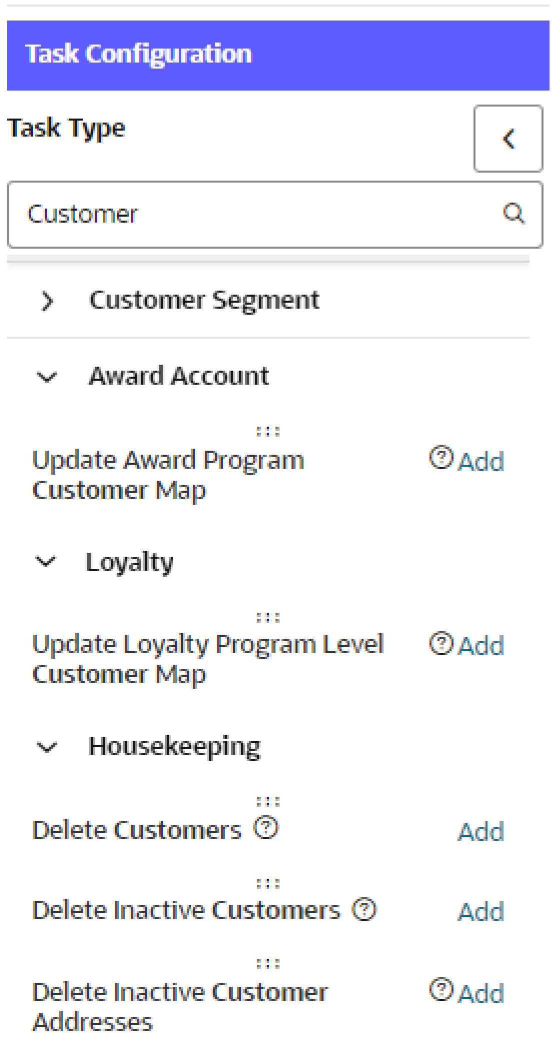
Building the Task List

a. To start the Task List selection, you can either filter by **Task Group and Task Type** or you can select one of the **Templates** to expand the **Task Type** selections.

b. To filter by **Task Group and Task Type**: In the Filter by Task Group and Task Type box, enter part or all of a **Task Group** or **Task Type**.

c. Press **Enter**, or click the **Search** icon.

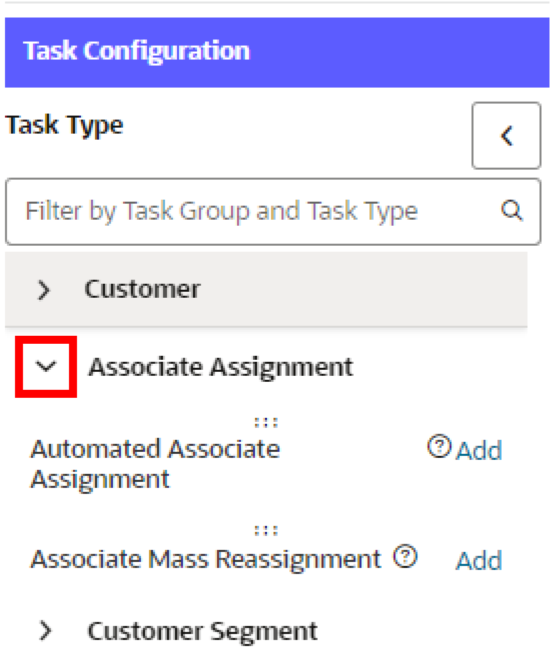
Figure 12-16   Task Type - Filtered



> **Note:**
>
> To see the available tasks in your filtered list, expand the **Template** to see the available choices from which to select.
>
> To **reset** the filter, highlight the words and press **Delete**. Then press **Enter**, or click the **Search** icon.

d. In the Task Type selection list, click a **Template Group** to expand its list of Task List options. See Jobs and Tasks for more information about Task Type group organization.

Figure 12-17 Expanded Task Type List



e. Click the **Add** link, or drag and drop the **Task Type Name** into the Task List window.

Figure 12-18 Adding Task Types to Task List

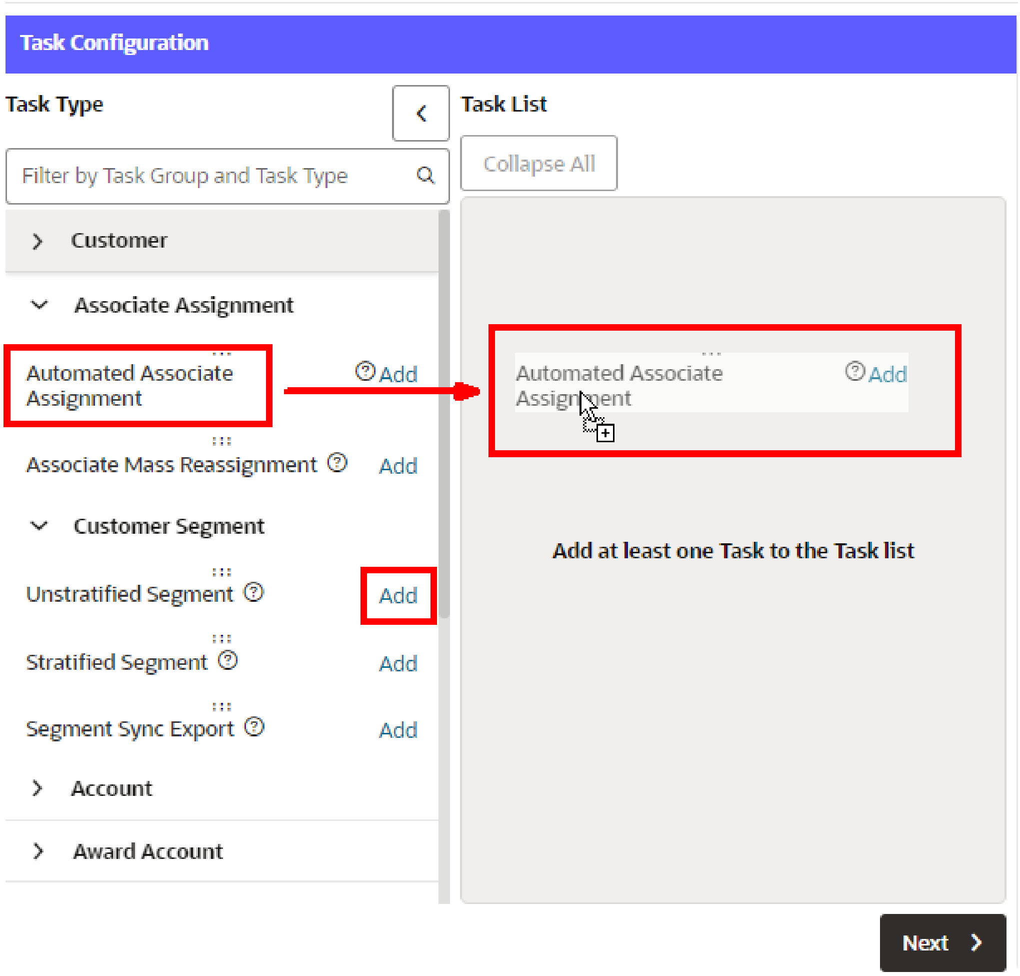
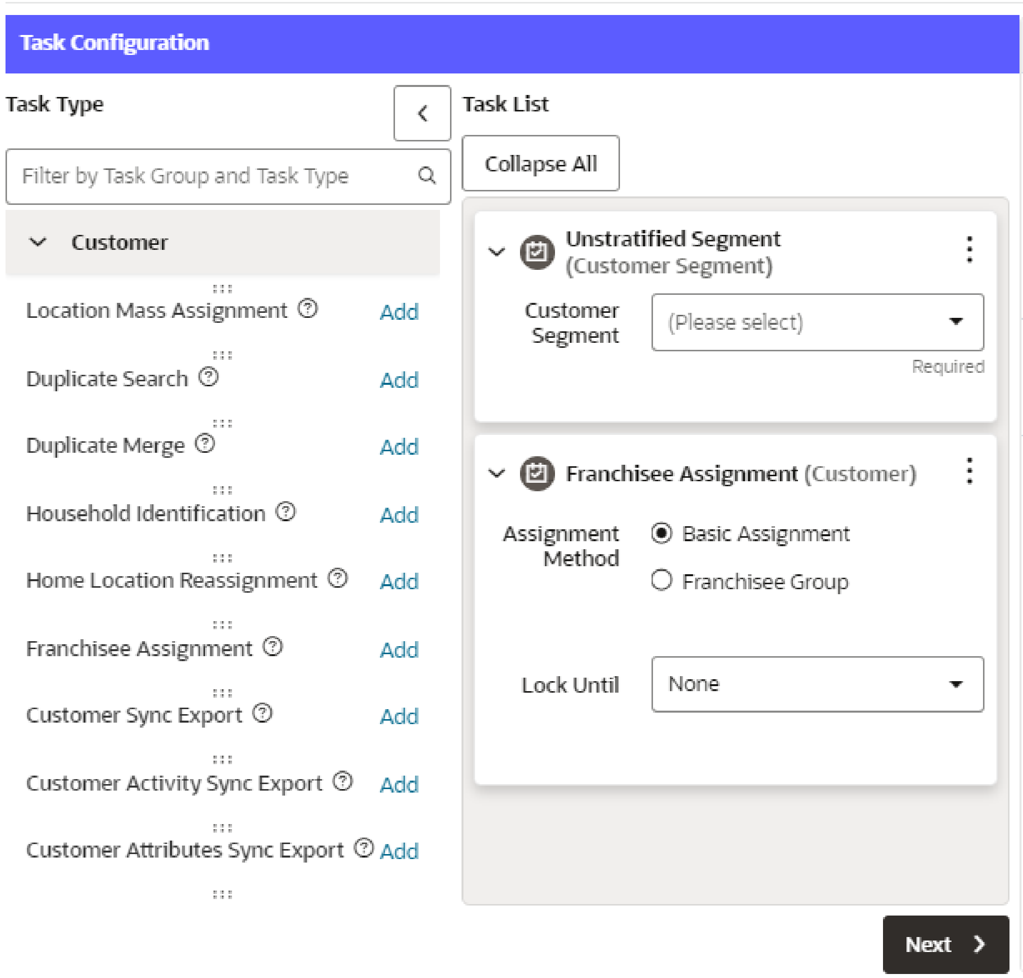


Figure 12-19 Added Task Types



f. Repeat **Step 3.e** until all tasks are added.

g. Enter the **Task List Criteria** into the appropriate fields. See Jobs and Tasks for more information about Task List fields.

Figure 12-20 Tasks

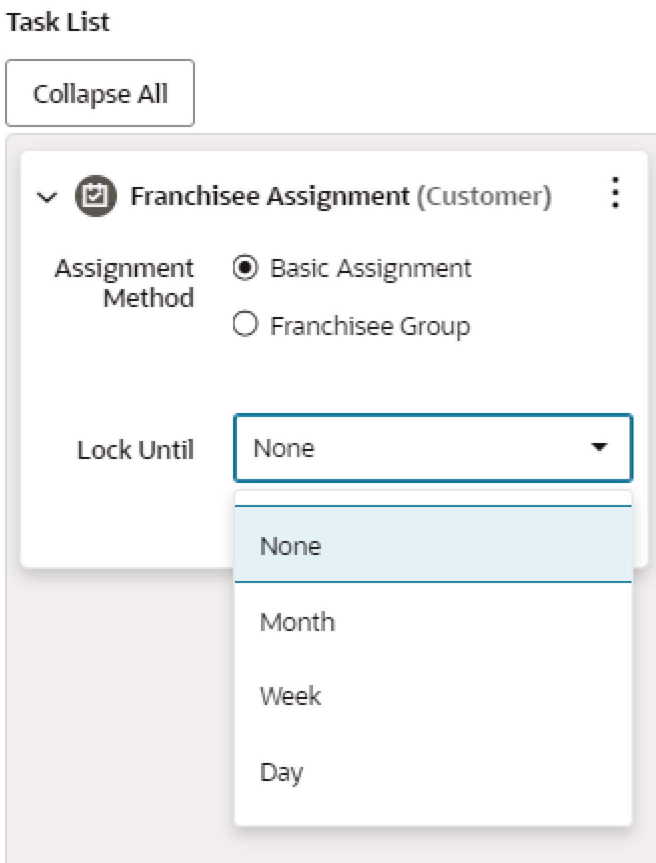
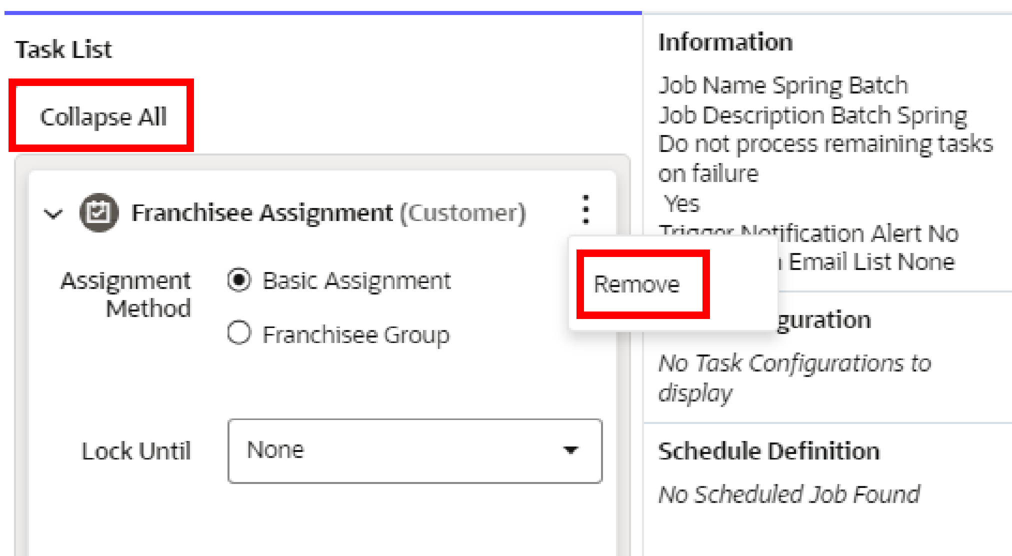


Figure 12-21 Task List Options

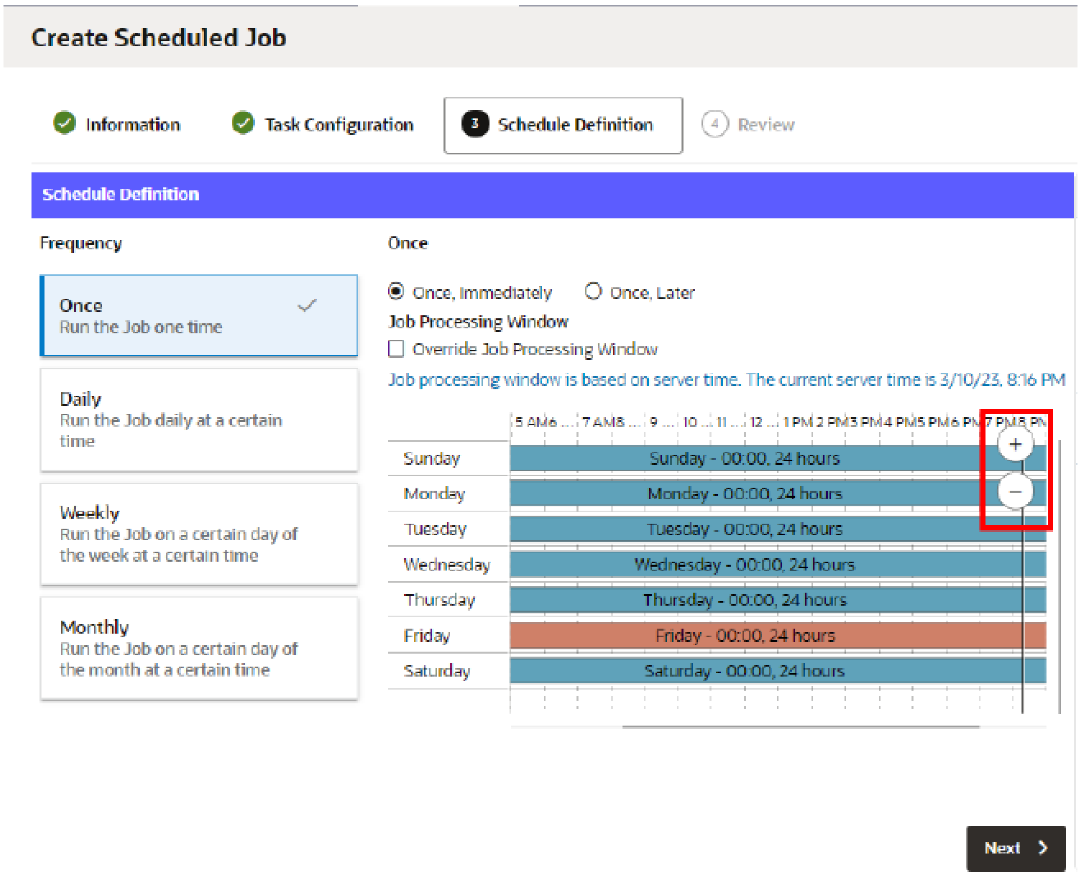


h. After entering the search criteria you can collapse or expand the details at any time. To collapse a task in the list, click the arrow next to each task. To change all tasks at once, click **Collapse All**/**Expand All** to **Collapse**/**Expand**.

i. When you need to clear a task from the Task List, click the **Action Menu** and then click **Remove**.

4. Click **Next** to go to the **Schedule Definition** tab.
5. Enter the following for the **Schedule Definition** tab:

Figure 12-22 Schedule Definition Tab



> ## Note:
>
> As shown in **Figure Figure 12-22**, hovering the mouse over the Job Processing Window enables the Zoom in and Zoom out icons. Click these icons to better view the days and times.

6. Select one of the following Job Execution Frequencies:
   - **Once, Immediately** to run the Job immediately, once you have finished creating/ saving this job. If you select this option, continue with **Step 6.f**.
   - **Once, Later** to run the Job at a later date. If you select this option, continue with **Step 6.a**.
   - **Daily** to run the Job every day. If you select this option, continue with **Step 6.a**.
   - **Daily, Business Days Only** to run the Job only on business days (that is, Monday through Friday). If you select this option, continue with **Step 6.a**.

- **Weekly** to run the Job once each week. If you select this option, continue with **Step 6.a**.
- **Monthly** to run the Job once each month. If you select this option, continue with **Step 6.a**.

a. Use the **Start Date Calendar Menu** to select the start of the date range in which the Job will run. If you selected a Job Execution Frequency of Once, Later, continue with **Step 6.e**.

b. Use the **End Date Calendar Menu** to select the end of the date range in which the Job will run.

> **Note:**
>
> For Daily, Daily, Business Days Only, Weekly, and Monthly, if **Disable End Date** is **selected**, the End Date configuration is deactivated, leaving the Job in effect, forever. To enable the End Date Calendar Menu, clear the check box.

If you selected a Job Execution Frequency of **Daily**, or **Daily, Business Days Only**, continue with **Step 6.e**.

If you selected a Job Execution Frequency of **Weekly**, continue with **Step 6.c**.

If you selected a Job Execution Frequency of **Monthly**, continue with **Step 6.d**.

c. Use the Day of Week Selection check boxes to select the days of the week that you want the Job to run. Continue with **Step 6.e**.

d. Use the Day of Month Selection Menu to select the day of the month on which the Job will run.

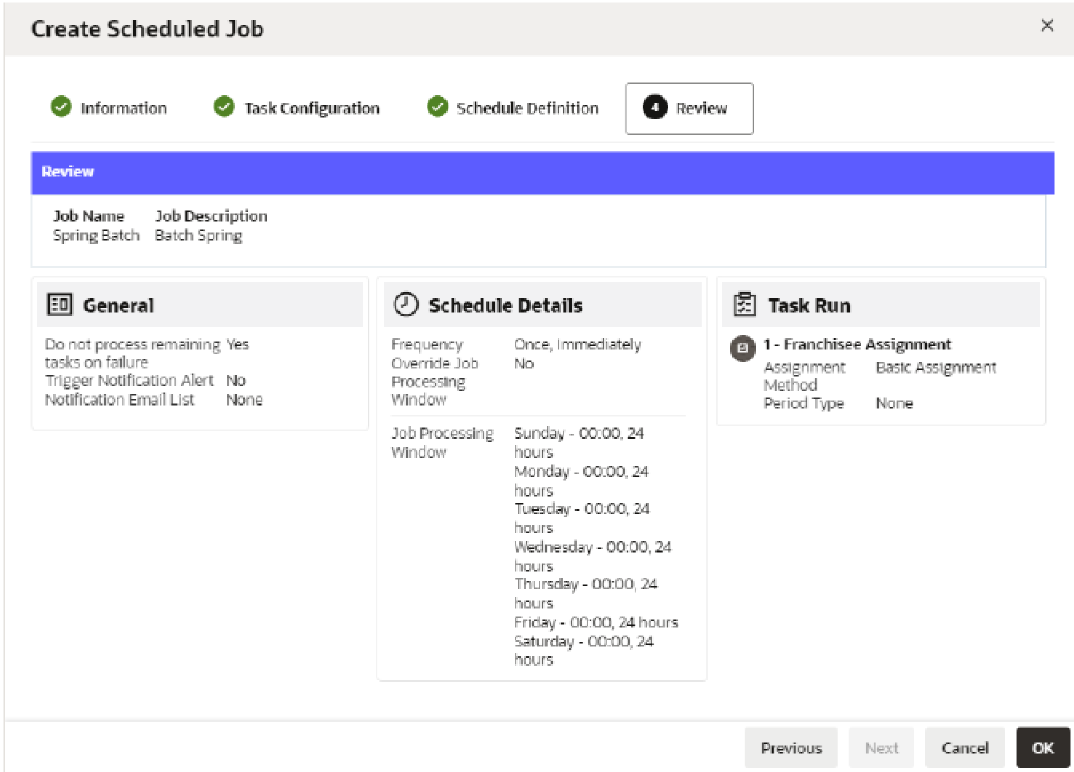
e. Use the Job Execution Time Menus to determine the time at which the Job will run.

It is recommended that you select a time that is within the Job Processing Window. If you select a time outside the Job Processing Window, the Override Job Processing Window setting (**see Step 6.f**) must be checked for the Job to run.

f. Use the Override Job Processing Window Check Box to indicate whether the Job should run, even if it is scheduled outside the Job Processing Window. See the Job Processing Window for more information on how the Job Processing Window works.

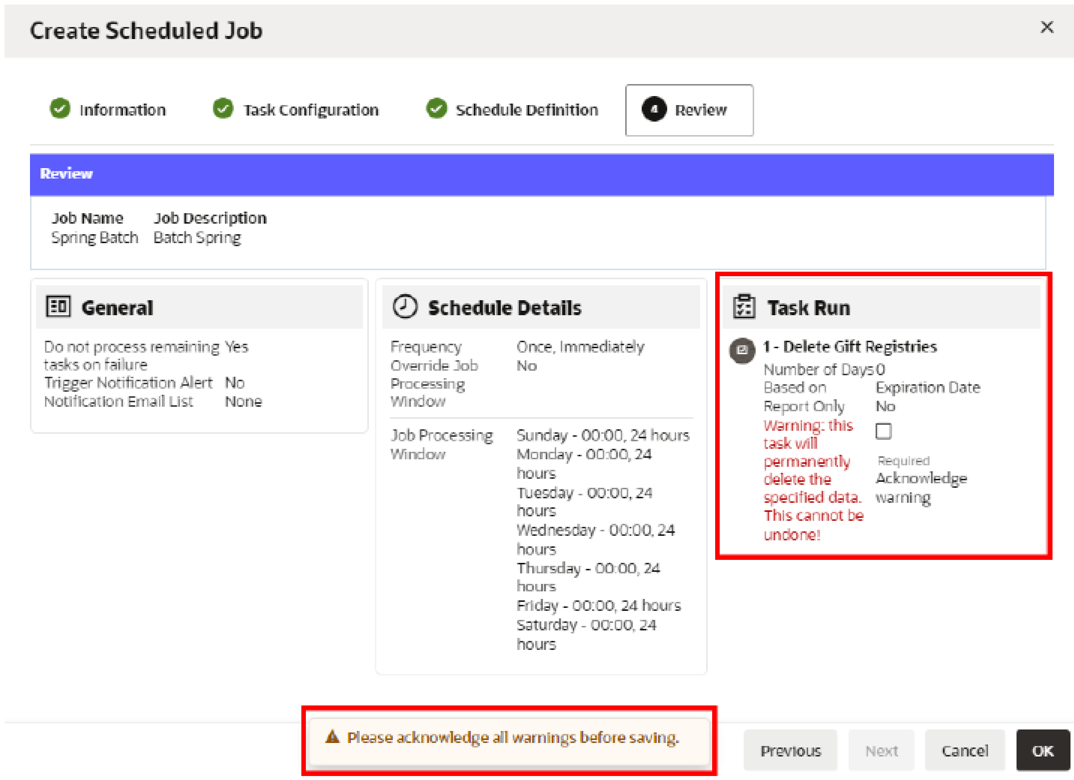
7. After defining the schedule, click **Next** to proceed to the **Review** tab.

Figure 12-23 Review Tab



> **Note:**
>
> Before you can submit certain jobs, you need to acknowledge any warning in the Review step.

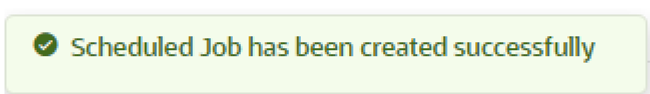
Figure 12-24 Review Tab - Confirm Choice Warning



8. Review the entered information to ensure that it is correct. Click **OK** to save the Job, or click **Cancel** to close the Job without saving. Click **Previous** or any **Tab** to return to any point of the Create Scheduled Job process.

> **Note:**
>
> Clicking **OK** triggers a confirmation notification to confirm the job has been created successfully.

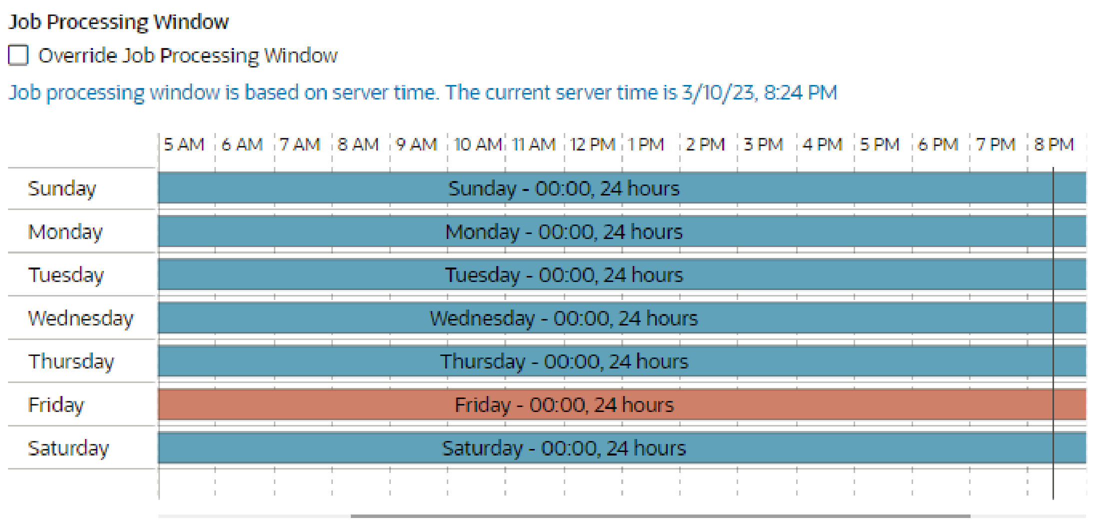
Figure 12-25 Confirmation Notification



Job Processing Window

The Job Processing Window field displays the times at which scheduled jobs should run. The Window is intended to indicate times when there is little processing load on the system, so that Jobs will not interfere with transaction processing.

Figure 12-26 Job Processing Window



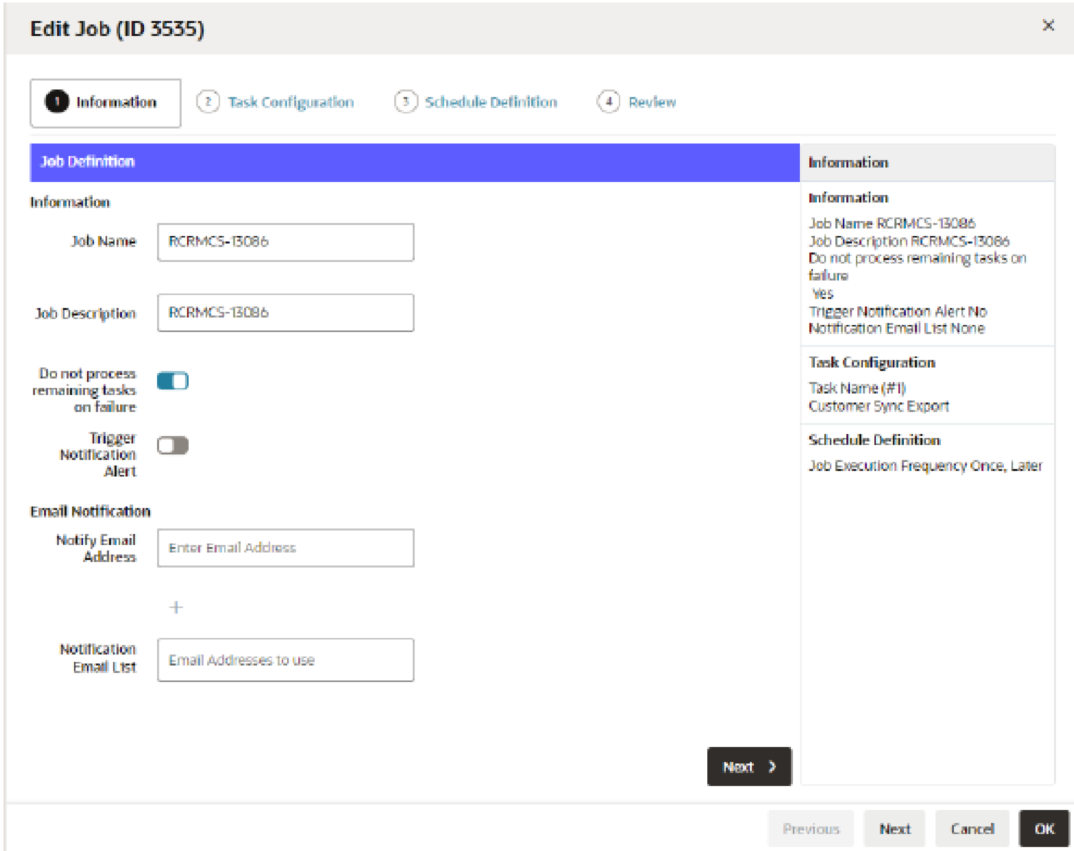
Editing a Job

To edit an existing Job:

1. Navigate to Job Home. See Job Quick Search.
2. Click the **All Scheduled Jobs** tile.

   The Scheduled Jobs list appears.
3. Search for the Job. See Job Quick Search - Job Scheduling Tiles or Job Advanced Search.
4. For the Job you want to edit, click the **Action Menu**.
5. Click **Edit**. The Job Create Wizard opens with all fields populated with the current configuration information.

Figure 12-27 Edit Job



6. Use Wizard Navigation to make any necessary changes. See Creating a Scheduled Job for a description of the fields and information.
7. When you are finished making changes to the Job, do one of the following, either:
   - Click **Save** to save the Job with the current settings and return to the Scheduled Jobs List or
   - Click **Cancel** to delete all changes and return to the Scheduled Jobs List.

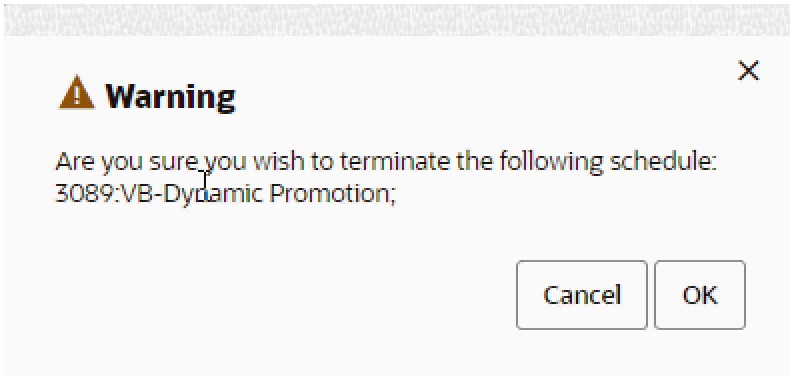
Deleting a Job

To delete an existing job:

1. View a Job. See Viewing a Scheduled Job.
2. Click the **Action Menu**.
3. Click **Delete**.

   A warning message appears.

Figure 12-28 Warning Message



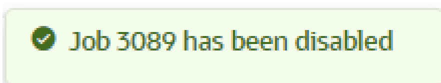
4. Click **Ok** to delete the job or **Cancel** to return to the Job.

Disabling a Job

To disable an existing job:

1. View a Job. See Viewing a Scheduled Job.
2. Click the **Action Menu**.
3. Click **Disable**.

Figure 12-29 Confirmation Notification



> **Note:**
>
> A confirmation notification appears to confirm the job has been disabled.

4. Click **Done** to close the job and return to the Job list.

   An empty circle before the Job Name indicates the job is disabled.

Enabling a Job

To enable a previously disabled job:

1. View a Job. See Viewing a Scheduled Job.
2. Click the **Action Menu**.
3. Click **Enable**. A confirmation notification appears to confirm the job is enabled.

Figure 12-30 Confirmation Notification

4. Click **Done** to close the job and return to the Job List.

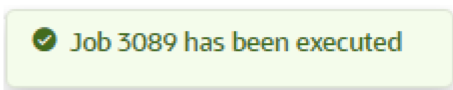
   A filled circle before the Job Name indicates the job is enabled.

Running a Job Immediately

To run an existing job immediately:

1. View a Job. See Viewing a Scheduled Job.
2. Click the **Action Menu**.
3. Click **Run Job Immediately**.

Figure 12-31 Confirmation Notification



> **Note:**
>
> A confirmation notification appears to confirm the job has been run.

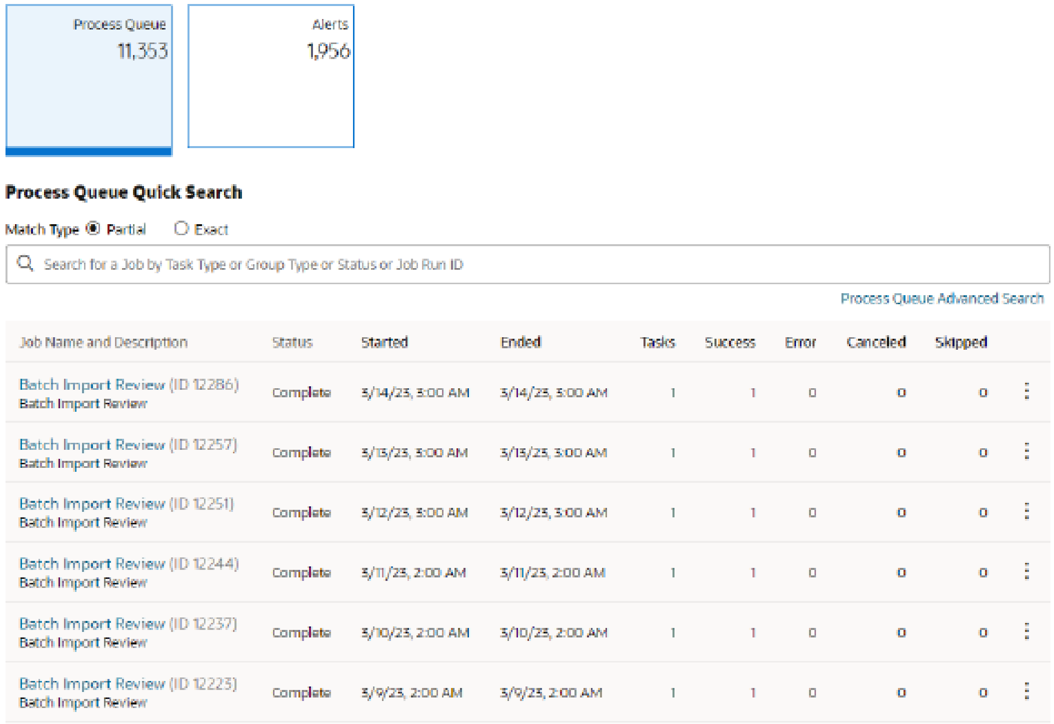
4. Click **Done** to close the job and return to the Job List.

Viewing a Job in Process Queue

To view a job in the Process Queue:

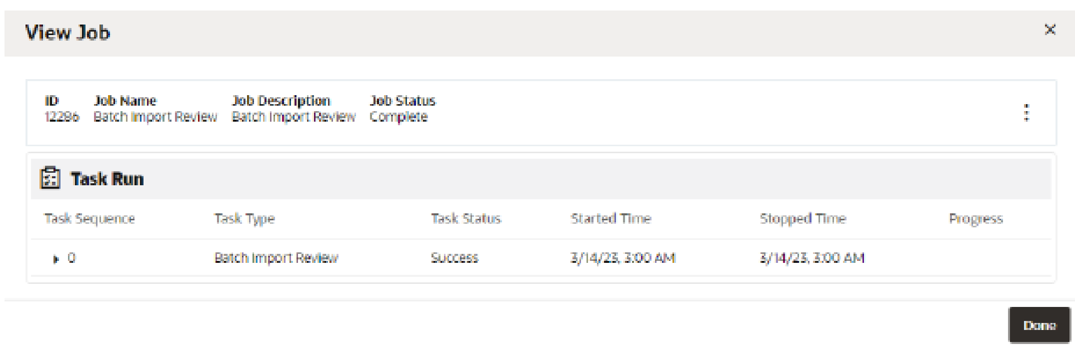
1. View a Job. See Viewing a Scheduled Job.
2. Click the **Action Menu**.
3. Click **View Job in Process Queue**. The Process Queue opens with all of the previous runs of the selected Job in the Process Queue.

Figure 12-32 View Job in Process Queue



4. For the run you want to view details for, click the **Action Menu**.
5. Click **View**. The specific Job Run appears.

Figure 12-33 Job Run Details



6. Click the **Action Menu** and then click **Refresh** to update the Task Run fields.
7. Click **Done** to close the job and return to the Process Queue for that job.

Jobs and Tasks

Jobs include one or more tasks that are chained together to run sequentially.

Each Job has additional parameters that must be configured. For information about these parameters, see Configure Job Parameters.The type of tasks that can be scheduled within a job are described in this section.

Customer Tasks

This section describes customer tasks.

Location Mass Assignment

This task searches Customer transaction histories in a selected date range and assigns each Customer to a Home Location, based on where the Customer shopped most frequently over the chosen date range.

In the database, there are two location fields: Home Location and Sign-Up Location. The system expects to see the Sign-Up Location populated from the POS or other data entry client. This field is static.

The Home Location field is intended to be the location to which the Customer is assigned as their primary location. As an example; it is possible that a Customer signs up in a location during a trip. However, there is a location in the Customer's neighborhood and subsequent to sign up, the Customer is seen to shop there regularly. As a basic management function, the administrator wants to assign the Customer to this location.

As Customers move around and as a retailer opens and closes locations it is a common, on-going requirement to assign and re-assign Customers to a home location. The Location Mass Assignment task will re-assign Customers to the home location where they shopped most frequently during the selected date range.

See Location Mass Assignment for job scheduling details.

Duplicate Search

This process allows you to schedule a search for duplicate Customer records. The search will identify potential duplicate Customer records by comparing information in each record and grouping them into Duplicate Sets.

See Duplicate Search for job scheduling details.

Duplicate Merge

This task performs the process of actually merging duplicate Customer records identified by the Duplicate Search job.

The Merge process that runs on this schedule will merge all duplicate sets that are marked as Approved regardless of the search strategy used to find them. After the merge, Customer Engagement will clean out all duplicate sets (Approved, Not Approved, and Merged) from the database.

Duplicates can be approved through a Duplicate Search job using the Automatic Approval option (see Duplicate Search), or in the Customer Merge Review procedure.

See Duplicate Merge for job scheduling details.

Household Identification

The Household Identification task determines which Customers belong to the same household. This is useful when creating mailing lists, as this allows you to limit the number of mailings sent out to one per household. Only primary home addresses are evaluated.

See Household Identification for job scheduling details.

Home Location Reassignment

The Home Location Reassignment task changes the Home Locations assigned to Customers.

See Home Location Reassignment for job scheduling details.

Franchisee Assignment

The Franchisee Assignment task assigns Franchisees to Customers.

See Franchisee Assignment for job scheduling details.

Customer Sync Export

Creates a file of customer data for export to a marketing system or a business intelligence/ analytics system. The data includes the customers name, address, email address, phone number, and additional information.

Depending on the selected batch export type, the export task may also generate a listing of customer records that have been deleted as a result of Customer Housekeeping or Customer Merge, or include deleted customer records in a single customer export file.

See Customer Sync Export for job scheduling details and generated files.

Customer Activity Sync Export

Creates a file for export to a marketing system. The data includes details on customer transactions.

See Customer Activity Sync Export for job scheduling details and generated files.

Customer Attributes Sync Export

Create a file for export to a marketing system or a business intelligence/analytics system. The data includes details on customer attributes.

See Customer Attributes Sync Export for job scheduling details and generated files.

Customer Address Sync Export

Create a file for export to a business intelligence/analytics system. The data includes details on the customer, Äôs address.

See Customer Address Sync Export for job scheduling details and the generated address file.

Customer Household Sync Export

Create a file for export to a business intelligence/analytics system. The data includes details on the association of a customer with a household.

See Customer Household Sync Export for job scheduling details and generated files.

Rebuild Category Totals

Recalculate the totals in the CST_DEPARTMENT_TOTALS tables for all customers active within a specified number of days, months, or years, for example: rebuild totals for customers active within the last 4 weeks. The maximum period of time is up to three years.

See Rebuild Category Totals for job scheduling details.

BI/Analytics Package Exporter

The BI/Analytics Package Exporter task enables you to package the export files into a zip file for export to the business intelligence/analytics system. This task should be the last task performed for a single job, running after the individual exports.

See BI/Analytics Package Exporter for job scheduling details.

Reset Customer YTD Totals

Resets the YTD totals for all Customers to zero.

See Reset Customer YTD Totals for job scheduling details.

Associate Assignment Tasks

This section describes associate assignment tasks.

Automated Associate Assignment

This task automatically assigns Associates to Customers, based on a set of selected criteria.

See Automated Associate Assignment for job scheduling details.

Associate Mass Reassignment

This task automatically reassigns the Customers assigned to a selected Associate to one or more new Associates.

See Associate Mass Reassignment for job scheduling details.

Customer Segment Tasks

This section describes customer segment tasks.

Unstratified Segment

This task finds Customers to be entered into an Unstratified Segment and counts the number of Customers in the Segment. For more information on Unstratified Segments, see Unstratified Segments.

See Unstratified Segment for job scheduling details.

Stratified Segment

This task organizes Customers into user-defined levels and counts the number of Customers in each strata level. For more information on Stratified Segments, see Stratified Segments.

See Stratified Segment for job scheduling details.

Segment Sync Export

This task generates a CSV file of customers within a stratified, unstratified, or manual segment for export to a marketing system or a business intelligence/analytics system.

See Segment Sync Export for job scheduling details and generated files.

Account Tasks

This section describes account tasks.

Export Card Series

This task creates an export file for Cards created using a SOAP Message or batch file.

When a Generate Card message is processed, individual Cards are created and, depending on configuration, assigned to Customers; however, the Card and Customer information is not exported to an XML file. This job will create an export file that includes the Customer Engagement-generated Card numbers and the Customer assigned to each Card.

> **Note:**
>
> The export file for this type of job is not compressed.

See Export Card Series for job scheduling details and generated files.

Release Expired PreAuthorizations

This task releases (removes) expired pre-authorization amounts that have not been settled or post-authorized. It searches Tender Accounts for PreAuth amounts that are older than their configured expiration time and removes them from the associated Tender Account.

See Release Expired PreAuth for job scheduling details.

Points/Awards Transfer Notification Export

This task creates CSV files for notifications about points transfers and/or award transfers. A separate file is generated for each type of transfer, and information is included to notify both the source (originating) Customer for the transfer and the target (recipient) Customer.

The integrated system, such as Responsys, can use the information to generate transfer notification emails to the originator and recipient of the award or points transfer, based on each Customer‚Äôs Contact Permissions. SMS messages can also be generated if the integrated system supports it.

The Enable Responsys Transfer Notification configuration property controls whether to send the notification in real time, or capture the data in a separate table and generate notifications through a batch export file. See the *Oracle Retail Customer Engagement Implementation Guide* for more information about System Configuration.

When interactive notification requests are sent through a web service message, use of the export file occurs only if an interactive request to generate the notification did not succeed. In this case, the details of the transfer are retained in the database until a scheduled notification export job runs.

See Points/Awards Transfer Notifications Export for job scheduling details and generated files. The Marketing Integration Properties chapter of the *Oracle Retail Customer Engagement Implementation Guide* describes the configuration required for transfer notification integration with a marketing system such as Responsys.

Notify Card Renewal

This task notifies Customers that they need to renew Cards that are set to expire within a certain, defined period of time.

See Notify Card Renewal for job scheduling details.

Tender Sync Export

This task generates a file of tender accounts and tender account activity for export to an external system.

See Tender Account Sync for job scheduling details and generated files.

Award Account Tasks

This section describes award account tasks

Issue Anniversary Awards

This task searches for Customers who have a birthday or signup date anniversary within the time frame specified and issues an eAward.

This process schedules the Issue Anniversary Awards process.

This task will look behind and ahead of the run date for Customers who have birthdays or signup anniversaries within the time period. The Customers that are found will receive an award coupon as created in this process. When this task is run, an export file (birthday or signup anniversary) is created.

See Issue Anniversary Awards for job scheduling details.

Notify Awards Expire

This task searches for Customers whose awards are scheduled to expire within a defined time window, and creates an export file containing award expiration notification information for those Customers.

See Notify Awards Expire for job scheduling details.

Award Sync Export

This task generates a file of award accounts and a file of award coupons for export to a marketing system.

See Award Sync Export for job scheduling details and generated files.

Update Award Program Customer Map

This task will update the list of customers, accounts and cards associated with award programs. This task is useful for increasing performance when obtaining member counts on various screens.

See Update Award Program Customer Map for job scheduling details.

Loyalty Tasks

This section describes loyalty tasks.

Distribute Loyalty Awards

This task creates an export file for all pending awards.

See Distribute Loyalty Awards for job scheduling details.

Create Loyalty Awards

This task converts loyalty points into awards, based on the parameters set for the program and program level.

See Create Loyalty Awards for job scheduling details.

Earn Loyalty Points

This task converts pending (escrow) loyalty points into earned loyalty points.

See Earn Loyalty Points for job scheduling details.

Expire Loyalty Points

This task expires (deletes) loyalty points based upon parameters in the Program/Level.

See Expire Loyalty Points for job scheduling details.

Reset Loyalty YTD Points

This task resets the YTD points earned by each Customer. This task should be run at the end of each calendar/fiscal year to reset YTD Points balances to zero. This task is used for reporting purposes only; it does not affect the actual loyalty points on an account. Life-to-date (LTD) points are not affected by this process.

See Reset Loyalty YTD Points for job scheduling details.

Loyalty Account Sync Export

This task generates a file of customer loyalty data for export to a marketing system or a BI/analytics system.

See Loyalty Account Sync Export for job scheduling details and generated files.

Loyalty Account Activity Sync Export

This task generates a file of customer loyalty account activity to a BI/analytics system.

See Loyalty Account Activity Sync Export for job scheduling details and generated files.

Loyalty Program Sync Export

This task generates a file of loyalty programs to a BI/analytics system.

See Loyalty Program Sync Export for job scheduling details and generated files.

Loyalty Award Transaction Sync Export

This task generates a file of loyalty award transactions to a BI/analytics system. See Loyalty Award Transaction Sync Export for job scheduling details and generated files.

Update Loyalty Program Level Customer Map

This task will update the list of customers, accounts and cards associated with loyalty programs and levels. This task is useful for increasing performance when obtaining member counts on various screens.

See Update Loyalty Program Level Customer Map for job scheduling details.

Housekeeping Tasks

This section describes housekeeping tasks.

When a database contains large amounts of old data, database performance and response may be slowed. To prevent the overburdening of the database with old, unneeded information, housekeeping tasks can be performed to remove old information.

Delete Award Inquiry Activities

This task deletes old award inquiry activities.

See Delete Award Inquiry Activities for job scheduling details.

Delete Batch Process Tracking

This task deletes old Batch Process Tracking records. Consolidated daily, weekly, and monthly records are stored in XMLAPI record tables in the database, and used to display information at the Batch Process Tracking pages.

See Delete Batch Process Tracking for job scheduling details.

Delete Customers

The Delete Customers task removes old Customer records that are no longer needed.

See Delete Customers for job scheduling details.

Delete Gift Registries

This task deletes all database information for Gift Registries that expired prior to a certain, defined period of time in the past.

See Delete Gift Registries for job scheduling details.

Delete Inactive Customer Addresses

This task deletes Customer addresses that are flagged as inactive.

See Delete Inactive Customer Addresses for job scheduling details.

Delete Inactive Customer Email Addresses

This task deletes Customer email addresses that are flagged as inactive.

See Delete Inactive Customer Email Addresses for job scheduling details.

Delete Inactive Customer Phone Numbers

This task deletes Customer phone numbers that are flagged as inactive.See Delete Inactive Customer Phone Numbers for job scheduling details.

Delete Inactive Customers

This task deletes old Customer records that are inactive.See Delete Inactive Customers for job scheduling details.

Delete Inactive Item Registries

This task deletes all database information for inactive Wish Lists that have not been updated within a certain, defined period of time.See Delete Inactive Item Registries for job scheduling details.

Delete Inactive Segment

This task deletes all database information for inactive segments.

See Delete Inactive Segment for job scheduling details.

Delete Job History

This task deletes old job history information.

See Delete Job History for job scheduling details.

Delete Loyalty Accounts and Activities

This task deletes old loyalty accounts and activities.

See Delete Loyalty Accounts and Activities for job scheduling details.

Delete Loyalty Inquiry Activities

This task deletes old loyalty inquiry activities.

See Delete Loyalty Inquiry Activities for job scheduling details.

Delete Loyalty Program Summary

This task clears down the Loyalty aggregation tables based on the YEAR and MONTH values and the "Number of Months" parameter value.

See Delete Loyalty Program Summary for job scheduling details.

Delete Merged/Archived Customers

This task deletes old Customer records that have been merged into other Customer records and archived.

See Delete Merged/Archived Customers for job scheduling details.

Delete Promotion

This task deletes old promotions. It also has the ability to delete an Offer that is associated with the Promotion which is being deleted.

> **Note:**
>
> This method deletes an Offer, provided it is not associated with any other Promotion and if it is associated with any other promotion, the Offer will not be deleted.

See Delete Promotion for job scheduling details.

Delete Segment History

This task deletes old segment history information.

See Delete Segment History for job scheduling details.

Delete Segments

This task deletes old segments.

See Delete Segments for job scheduling details.

Delete Social Activity

This task deletes all social activities from the database that were posted before a certain number of days in the past.

See Delete Social Activity for job scheduling details.

Delete Tasks

This configuration is for a job that deletes tasks from the system. Users can select either or both the **Status** and **Last Update** check boxes to close all tasks based on a status only, status and time period, or only a time period.The default option for status is closed.

See Delete Tasks for job scheduling details.

Delete Stored Files

This task deletes old transfer files.

See Delete Stored Files for job scheduling details.

Delete Transaction History

This task deletes old transaction information.

See Delete Transaction History for job scheduling details.

Delete Web Service Tracking

This task deletes old Web Service Tracking records.

See Delete Web Service Tracking for job scheduling details.

Delete Import Files

The Delete Import Files task removes files in import directories that have not been modified in a specified number of days.

See Delete Import Files for job scheduling details.

Delete Batch Import History

This task deletes old records from the XMLAPI_PROCESSED_RECORD table. This information is displayed at the Batch Import Review screen.

See Delete Batch Import History for job scheduling details.

OLAP Tasks

This section describes OLAP tasks.

Aggregate Award Program Summary

As part of the Online Analytical Processing (OLAP), this task summarizes data by program and month for award activity and account data for the Award Program Scorecard.

See Aggregate Award Program Summary for job scheduling details.

Aggregate Loyalty Program Summary

As part of the Online Analytical Processing (OLAP), this task summarizes data by program and month for loyalty activity and account data for the Loyalty Program Scorecard.

See Aggregate Loyalty Program Summary for job scheduling details.

Aggregate Promotion Scorecard Summary

As part of the Online Analytical Processing (OLAP), this task summarizes data by offer and month for targeted and untargeted audiences for the Promotion Scorecard.

See Aggregate Promotion Scorecard Summary for job scheduling details.

Aggregate Tender Program Summary

As part of the Online Analytical Processing (OLAP), this task summarizes data by program and month for tender activity and account data for the Tender Program Scorecard.

See Aggregate Tender Program Summary for job scheduling details.

Aggregate Loyalty Facts

As part of Online Analytical Processing (OLAP), information about the loyalty program must be aggregated into a summary that can then be retrieved. This task aggregates loyalty information into a summary that can be used by OLAP processes.

See Aggregate Loyalty Facts for job scheduling details.

Aggregate Tender Facts

As part of Online Analytical Processing (OLAP), information about Tender Accounts must be aggregated into a summary that can then be retrieved. This task aggregates Tender Account information into a summary that can be used by OLAP processes.

See Aggregate Tender Facts for job scheduling details.

Campaign Tasks

This section describes campaign tasks.

Dynamic and Recurring Promotions

This task updates the Targets for all Dynamic and Recurring Promotions.

See Dynamic and Recurring Promotions for job scheduling details.

Promotion Response Data Import

This task imports customer event data from a marketing system such as Responsys.

See Promotion Response Data Import for job scheduling details and import file formats.

Social Network Integration Tasks

This section describes social network integration tasks.

Social Network Listener

This task searches social networks for Customer posts that meet search criteria defined by Social Listeners.

See Social Network Listener for job scheduling details.

Social Network Update

This task checks for new Social Profiles to add to Customer records.

See Social Network Update for job scheduling details.

Clienteling Tasks

This section describes clienteling tasks.

Task Generator

Generate tasks for Segments with Task Generation enabled. See Segments.

See Task Generator for job scheduling details.

Email Notification Tasks

This section describes email notification tasks.

Batch Import Review

Allows the Batch Import Review settings to be maintained.

See Batch Import Review for job scheduling details.

System Tasks

This section describes system notification tasks.

OCDS Sync

This task generates requests to the Omnichannel Cloud Data Service (OCDS) for updates on item and merchandise hierarchy data as well as location and franchise data.

See ODCS Sync for job scheduling details.

Data Sync

This task is responsible for moving data from the multiple pending Queues to the InProgress Queue in batches. Once the movement of each batch is complete, the records are deleted from the respective Pending Queue. After the data is transferred into the InProgress Queue, the job creates a message based on the operation and the object Name associated with each record. Next, one by one, each message is transferred to the third party application.

See Data Sync for job scheduling details.

ORPE Sync

This task is used to load existing item hierarchy and location data in ORCE to the Promotion Engine (ORPE). This task will first delete all the deal product attributes and deal store attributes from the Promotion Engine and then reload the attributes from ORCE.

See ORPE Sync for job scheduling details.

Configure Job Parameters

The parameters that must be configured for a given task depend upon the task being defined.

The processes performed by these jobs are described above in Jobs and Tasks.

The following sections describe the fields that configure each task.

Location Mass Assignment

This Task has the following parameters:

- Date Range Type - This Selection Menu determines the Date Range used.
- Start Date - This Calendar Menu determines the first date of the Date Range (only available if Date Range Type is set to Specific Date Range).
- End Date - This Calendar Menu determines the final date of the Date Range (only available if Date Range Type is set to Specific Date Range).

Duplicate Search

This task has the following parameters:

- Search Strategy - This Selection Menu determines the strategy used to search for duplicate Customers. See Search Strategy Field Comparisons for a description of search strategies.
- Valid Data Only - This toggle determines whether the search strategy will only look at addresses, phone number, and/or email addresses that have been validated (see Customer Validation for more information). If the toggle is off, Customer Engagement will look at all addresses, phone number, and email addresses.
- Automatic Approval - This toggle determines whether the Duplicate Sets found by the search process is automatically approved for merging on the next scheduled merge.

Search Strategy Field Comparisons

The following table shows which fields are compared for the search strategy selected.

Table 12-1 Search Strategy Fields Comparison

Field	Name Address	Name Phone	Name Email	Name Address Phone Email
First Name	X	X	X	X
Middle Name	X	X	X	X
Second First Name	X	X	X	X
Second Last Name	X	X	X	X
Last Name	X	X	X	X
Suffix	X	X	X	X
Address 1	X			X
Address 2	X			X
City	X			X
State	X			X
Postal Code	X			X
Area Code		X		X
Phone Number		X		X
Email Address			X	X

Duplicate Merge

This task has the following parameter:

- Generate customer note - This toggle determines whether a Customer note is generated when duplicate Customers are merged.

Merge Behavior

The merge behavior described in this section can be overridden through the use of configuration settings. Contact your Project Manager for more information.

When a duplicate set is merged, there are certain checks that are made on each Customer record in the set and specific actions taken based on the results of that check. These duplicate checks are configured through System Configuration. See the *Oracle Retail Customer Engagement Implementation Guide* for more information about configuring duplicate checks.

Merge Records Logic

This section describes the new Customer record that results from the merge process. The following table lists information categories and where the information for the new record comes from.

Table 12-2 Merge Records Logic

Category	Comes From
Customer ID	New
Home Location	Source
Personal Preferences	Source

Table 12-2 (Cont.) Merge Records Logic

Category	Comes From
Name	Source
Address(es)	Source
Email Address(es)	Source
Telephone Number(s)	Source
Personal Summary	Source
Socioeconomic Profile	Source
Alternate IDs	All Duplicate records
Customer Attributes	All Duplicate records
Transactions	All Duplicate records
Effective Date	Maximum of all Duplicate Records
Expiry Date	Maximum of all Duplicate Records
Create Date	Maximum of all Duplicate Records
First Transaction Date	Maximum of all Duplicate Records
Last Transaction Date	Maximum of all Duplicate Records
Total Values	Sum of all Duplicate Records
YTD Values	Sum of all Duplicate Records
Signup Date/Location	Minimum of duplicate records that have both, or source if has both, or minimum date of duplicate records and any location.
Birthday	Source or any if source is empty.
Update Date	Current Date
Card Associations	All Cards associated with new Customer ID.

Household Identification

- Identify Household Strategy - This Selection Menu determines the search method used to organize Customers into Households.
  - PRIMARY HOME ADDRESS - Customers with the same primary home address is organized into a Household.
  - LAST NAME PRIMARY HOME ADDRESS - Customers with both the same last name and the same primary home address is organized into a Household.

    Business addresses are not evaluated.
- Valid Data Only - This toggle determines whether the search strategy will only look at addresses and names that have been validated (see Customer Validation for more information). If the toggle is off, Customer Engagement will look at all addresses and names.
- Reset Prior Run Data - This toggle determines how existing Households are treated by the Task.
  - On - Existing Households are ignored and the Households are created anew each time the Task runs.
  - Off - [default] Existing Households are kept in place.

Home Location Reassignment

This task has the following parameters:

- Assignment Method - These Radio Buttons determine how Customers are assigned to Locations.
  - Reassign - [default] Check all Customers for reassignment.
  - Distribute among - Assign Customers from one Home Location among a set of Locations.
- Currently Assigned To - This Selection Menu determines which Location's Customers are reassigned. This field is only shown when Distribute among is selected in the Assignment Method Radio Buttons.
- Reassign to - The area displays the set of Locations among which the Customers are reassigned. This field is only shown when Distribute among is selected in the Assignment Method Radio Buttons.

  To add a Location:

  1. Click the Click here to select Link. A Search Home Location Window opens.
  2. Select the Location in the Selection Menu.
  3. Click the OK button. The Search Home Location Window closes and the Location is added to the Reassign to area.

  To delete a Location:

  1. Click to select the Location in the Reassign to area.
  2. Click the Delete Link. The Location is removed.
- Lock Until - After a Customer is assigned to a Home Location by this task, that Customer cannot be assigned to a new Home Location during the period of time determined by this Selection Menu.

Franchisee Assignment

This task has the following parameters:

- Assignment Method - These Radio Buttons determine how Customers are assigned to Franchisees.
  - Basic Assignment - [default] Check whether the Franchisee Assignment for each Customer record needs to be changed.
  - Franchisee Group - Assign Customers from one Franchisee among a set of Franchisees.
- Currently Assigned To - This Selection Menu determines which Franchisee's Customers are reassigned. This field is only shown when Franchisee Group is selected in the Assignment Method Radio Buttons.
- Franchisee Group - The area displays the set of Franchisees among which the Customers are reassigned. This field is only shown when Franchisee Group is selected in the Assignment Method Radio Buttons.
- Lock Until - After a Customer is assigned to a Franchisee by this task, that Customer cannot be assigned to a new Franchisee during the period of time determined by this Selection Menu.

Customer Sync Export

Before you submit this task, you must select an export target system of either Marketing for a system such as Responsys, or BI/Analytics for a system such as Retail Insights. The Supported Batch Exporter Types property controls which of these options are available.

See the *Oracle Retail Customer Engagement Implementation Guide* for more information about System Configuration.

Customer Sync Export - Marketing

If you select an export target system of Marketing, the following options are displayed.

With a selection of Marketing as the export target system, this task has the following parameters:

- Export type - Controls which records to include in the export file:
  - Export all active records - Include all active customer records with email addresses.
  - Export updated records only - Include customer records only if they have changed since the last export. With this selection, the Once Immediately and Once Later options for scheduling the job are not available.

    Note that, regardless of your selection here, the first time you run the export all active customer records are included.
- Specify export filename - These fields control the creation of the CSV file containing new or updated customer records.

  At least one entry (prefix, static name, or suffix) is required:
  - Prefix - The date and time stamp format to use as a prefix for naming the export file.
    - no prefix - Do not use a date and time stamp prefix on the file name.
    - yyyyMMdd_HHmmss - Use a date and time stamp prefix in this format (for example, 20160630_123456 where the year is 2016, the month is June, the date is 30, and the time is 12:34:56).
    - yyyy-MM-dd_HHmmss - Use a date and time stamp prefix in this format (for example, 2016-06-30-123456, where the year is 2016, the month is June, the date is 30, and the time is 12:34:56).

  The setting of the Responsys Export Filename Default Prefix property defaults.
  - Static Name - The text string to include in the file name between the prefix and suffix, if any. The setting of the Responsys Customer Sync Default Filename property defaults.
  - Suffix - The date and time stamp format to use as a suffix for naming the export file. The date and time stamp format options for the suffix are the same as for the prefix, described above. The setting of the Responsys Export Filename Default Suffix property defaults.
  - Filename - Displays an example of the export file name with the prefix and suffix format, if any. This field is blank if you have not yet selected a prefix format, suffix format, or static name.
- Specify deletes export filename - These fields control the creation of the CSV file listing the customer IDs of customer records that have been deleted through a housekeeping job or a customer merge since the last time you ran the export. At least one entry (prefix, static name, or suffix) is required.

- Prefix - The date and time stamp format to use as a prefix for naming the deletes export file:
  - no prefix - Do not use a date and time stamp prefix on the file name.
  - yyyyMMdd_HHmmss - Use a date and time stamp prefix in this format (for example, 20160630_123456 where the year is 2016, the month is June, the date is 30, and the time is 12:34:56).
  - yyyy-MM-dd_HHmmss - Use a date and time stamp prefix in this format (for example, 2016-06-30-123456, where the year is 2016, the month is June, the date is 30, and the time is 12:34:56).

The setting of the Responsys Export Filename Default Prefix property defaults.

- Static Name - The text string to include in the file name between the prefix and suffix, if any. The setting of the Responsys Customer Deletes Sync Default Filename property defaults.
- Suffix - The date and time stamp format to use as a suffix for naming the deletes export file. The date and time stamp format options for the suffix are the same as for the prefix, described above, with a default of no suffix. The setting of the Responsys Export Filename Default Suffix property defaults.

- Filename - Displays an example of the deletes export file name with the prefix and suffix format, if any. This field is blank if you have not yet selected a prefix format, suffix format, or static name.

Customer Export File - Marketing

The customer export file is a comma-separated values file containing the following information:

- Customer ID and home store code.
- Customer name, including salutation, first name, second first name, middle name, last name, second last name, and suffix.
- Active flag (set to 1 if active).
- Primary address, including address lines 1 through 4, city, state, postal code, and country code.
- Primary email address, including email type code.
- Primary phone number, including phone type code.
- Customer's mail, email, and phone contact flags, set to 1 if selected and 0 if unselected.

Only customer records with email addresses are included in the export.

Customer ,Delete Export File - Marketing

The customer export file is a comma-separated values file containing the customer ID of each deleted customer, and the active flag setting of 0.

Customer Sync Export - BI/Analytics

If you select an export target system of BI/Analytics, the following options are displayed.

With a selection of BI/Analytics as the export target system, this task has the following parameters:

- Export type - Controls which records to include in the export file:

- Export all active records - Include all active customer records.
- Export updated records only - Include customer records only if they have changed since the last export. With this selection, the Once Immediately and Once Later options for scheduling the job are not available.

  Note that, regardless of your selection here, the first time you run the export all active customer records are included.
- Specify export filename - If you selected an Export type of BI/Analytics, the setting of the Retail Insights Customer Sync Default Filename property is displayed and cannot be changed.

Customer Export File - BI/Analytics

The customer export file is a pipe-delimited values file that typically contains the following information:

- Customer ID.
- Postal code.
- City.
- State.
- Country.
- Active flag for the customer.
- Prospect flag indicating if the customer is a prospect.
- Gender.
- Ethnicity.
- Marital status.
- Educational level.
- Effective date for the address.
- Annual income.
- Contact flag setting.
- Organization name, if the customer is an organization.
- Date when customer was added to the system.
- Flag indicating if the customer is an organization.
- Phone contact flag setting.
- Email contact flag setting.
- Fax contact flag setting.
- Mail contact flag setting.
- Birth month.
- Birth date.

The export file does not include a header row. Instead, there is a separate file with the same name as the customer sync export file, but with an extension of .ctx, that includes the titles of each column in the export file. For example, if the customer sync export file name is W_PARTY_PER_DS.dat, the file containing the header row names is W_PARTY_PER_DS.ctx.

Any customers that have been deleted are included in the customer export file. The only information included for deleted customers is the customer ID, active flag, prospect flag, call flag, delete flag, organization flag, and the contact flag settings.

Customer Address Sync Export

This task has the following parameters:

- Batch Exporter Type - Defaults to BI/Analytics and cannot be changed.
- Export type - Defaults to Export all active records and cannot be changed.
- Specify export filename - The setting of the Retail Insights Customer Activities Sync Default Filename property is displayed and cannot be changed.

Customer Address Export File - BI/Analytics

The customer address export file is pipe-delimited, and typically contains the following information:

- Customer ID.
- Sequence number identifying the order in which the customer's addresses were added to the database.
- Primary address flag setting.
- Date when the address became effective.
- Date when the address expired.
- First, second, and third lines of the customer's street address.
- City.
- State.
- Country.
- Postal code.

The export file does not include a header row. Instead, there is a separate file with the same name as the customer address export file, but with an extension of .ctx, that includes the titles of each column in the export file. For example, if the customer address export file name is W_RTL_CUST_ADDRESS_DS.dat, the file containing the header row names is W_RTL_CUST_ADDRESS_DS.dat.ctx.

Customer Activity Sync Export

This task has the following parameters:

- Select target batch exporter system - Select Marketing.
- Export type - Controls which records to include in the export file:
  - Export all active records - Include activity for all active customer records.
  - Export updated records only - Include activity for customer records only if the activity occurred since the last export With this selection, the Once Immediately and Once Later options for scheduling the job are not available.

  Note that, regardless of your selection here, the first time you run the export, activity for all active customer records is included.

- Specify export filename - These fields are displayed only if you selected an Export type of Marketing, and control the creation of the CSV file containing new or updated customer records.

  At least one entry (prefix, static name, or suffix) is required:

  - Prefix - The date and time stamp format to use as a prefix for naming the export file:
    - no prefix - Do not use a date and time stamp prefix on the file name.
    - yyyyMMdd_HHmmss - Use a date and time stamp prefix in this format (for example, 20170830_123456 where the year is 2017, the month is August, the date is 30, and the time is 12:34:56).
    - yyyy-MM-dd_HHmmss - Use a date and time stamp prefix in this format (for example, 2017-08-30-123456, where the year is 2017, the month is August, the date is 30, and the time is 12:34:56).

      The setting of the Responsys Export Filename Default Prefix property defaults.
  - Static Name - The text string to include in the file name between the prefix and suffix, if any. The setting of the Responsys Customer Activities Sync Default Filename property defaults.
  - Suffix - The date and time stamp format to use as a suffix for naming the export file. The date and time stamp format options for the suffix are the same as for the prefix, described above. The setting of the Responsys Export Filename Default Suffix property defaults.
  - Filename - Displays an example of the export file name with the prefix and suffix format, if any.

Customer Activity Export File

The customer activity export file contains the following information for each transaction it includes:

- Customer ID.
- Year when the activity occurred.
- Item hierarchy levels 1, 2, and 3; for example, this might be DEPT, SUB_DEPT, and CLASS, with the Hierarchy ID for each level indicated for each record. The level is 0 if there is no hierarchy definition for that level.
- The total count of the item for the activity. The count is 0 if the activity did not involve an item quantity.
- The monetary value of the activity, based on the price of the item. Includes up to two decimal positions if the amount is not a whole number.
- The code identifying the location, if any, associated with the activity. Blank if the activity was not associated with a location.
- The latest business date when the activity occurred.
- The latest business date when the activity was updated.

Customer Attributes Sync Export

This task has the following parameter:

- Batch Exporter Type - Select either Marketing or BI/Analytics.

Customer Attributes Sync Export - Marketing

If you select a Batch Exporter Type of Marketing, complete the following parameters:

- Specify export filename - These fields control the creation of the CSV file containing new or updated customer attribute records. At least one entry (prefix, static name, or suffix) is required:
  - Prefix - The date and time stamp format to use as a prefix for naming the export file:
    - no prefix - Do not use a date and time stamp prefix on the file name.
    - yyyyMMdd_HHmmss - Use a date and time stamp prefix in this format (for example, 20160630_123456 where the year is 2016, the month is June, the date is 30, and the time is 12:34:56).
    - yyyy-MM-dd_HHmmss - Use a date and time stamp prefix in this format (for example, 2016-06-30-123456, where the year is 2016, the month is June, the date is 30, and the time is 12:34:56).

    The setting of the Responsys Export Filename Default Prefix property defaults.
  - Static Name - The text string to include in the file name between the prefix and suffix, if any. The setting of the Responsys Customer Attributes Sync Default Filename property defaults.
  - Suffix - The date and time stamp format to use as a suffix for naming the export file. The date and time stamp format options for the suffix are the same as for the prefix, described above. The setting of the Responsys Export Filename Default Suffix property defaults.
  - Filename - Displays an example of the export file name with the prefix and suffix format, if any. This field is blank if you have not yet selected a prefix format, suffix format, or static name.
- Seq and Attribute - Use the drop-down list to select each attribute to include in the export file. Only attributes that have the Publish To Batch Exporter and Open Access flags selected are available for selection from the drop-down.

Customer Attribute Export File - Marketing

The customer attribute export file is comma-separated, and typically contains the following information:

- Customer ID.
- Customer primary email address.
- A column for each attribute selected for inclusion in the export file, and the current setting of that attribute for the customer.

The file includes a header row with the name of each column. The column for each attribute is indicated by the attribute name and ID.

Customer Attributes Sync Export - BI/Analytics

If you select a Batch Exporter Type of BI/Analytics, complete the following parameters:

- Customer Attributes Filename - The setting of the Retail Insights Customer Attributes Sync Default Filename property is displayed and cannot be changed.

- Attribute Metadata Filename - The setting of the Retail Insights Attribute Metadata Sync Default Filename property is displayed and cannot be changed.
- Seq and Attribute - Use the drop-down list to select each attribute to include in the export file. Only attributes that have the Publish To Batch Exporter and Open Access flags selected are available for selection from the drop-down. Select from the following types of attributes:
  – Varchar Type Attribute - The Retail Insights Varchar Type Attribute Allowed Count property controls the number of varchar type attributes you can select for export.
  – Numeric Type Attribute - The Retail Insights Numeric Type Attribute Allowed Count property controls the number of numeric type attributes you can select for export.
  – Data Type Attribute - The Retail Insights Date Type Attribute Allowed Count property controls the number of data type attributes you can select for export.

Customer Attribute Metadata Export File - BI/Analytics

The customer attribute export metadata file is pipe-delimited, and indicates how to map the Customer Attribute data from Customer Engagement to the target BI/Analytics system.

For example, a record in the metadata file might be:

```
RING_SIZE|CE|PARTY_ATTR1_NAME|W_PARTY_ATTR_DS|Customer Ring Size|VARCHAR|1|
RING_SIZE~CE~PARTY_ATTR1_NAME~W_PARTY_ATTR_DS|
```

Where:

- RING_SIZE = The attribute's Name, from the DTV_ATTRIBUTE_TYPE table
- CE = Hard-coded to CE
- A physical column name such as:
  – PARTY_ATTR[N]_NUM_VALUE = the [N] numeric attribute passed, or
  – PARTY_ATTR[N]_NAME_VALUE = the [N] name attribute passed, or
  – PARTY_ATTR[N]_DATE_VALUE = the [N] date attribute passed

  Where
  – PARTY_ATTR is hard-coded
  – [N] indicates the column number for that datatype, and
  – VALUE is the type of column (NUMBER, NAME, or DATE)

  Since there can be multiple attributes of the same data type passed, such as two date attributes, it is necessary to number the attributes with the same data type.
- W_PARTY_ATTR_DS = the target table in the BI/Analytics system
- Customer's Ring Size = the attribute‚Äôs Description, from the DTV_ATTRIBUTE_TYPE table
- VARCHAR = the data type of the attribute in the BI/Analytics system; displayed as Character at the Attribute Definition list page
- 1 = Hard-coded to 1
- RING_SIZE~CE~PARTY_ATTR1_NAME~W_PARTY_ATTR_DS = concatenation of the attribute name + CE + ~ + the physical column name + ~ + the target table name

The metadata file name is from the Retail Insights Customer Attribute Metadata Batch Exporter Templates property.

When you use the BI/Analytics Package Exporter to create a zip file containing the files for export to the BI/Analytics system, the attribute metadata file is merged with the metadata file from the Segment Sync Export.

Customer Attribute Export File - BI/Analytics

The customer attribute export file is pipe-delimited, and typically contains the following information:

- Customer ID.
- Category hard-coded to RETAIL
- Supplier flag hard-coded to N.
- Attribute value setting.

A column for each attribute selected for inclusion in the export file, and the current setting of that attribute for the customer.

The export file does not include a header row. Instead, there is a separate file with the same name as the customer attribute export file, but with an extension of .ctx, that includes the titles of each column in the export file. For example, if the customer attribute export file name is W_RTL_PARTY_PER_ATTR_DS.dat, the file containing the header row names is W_RTL_PARTY_PER_ATTR_DS.dat.ctx.

Customer Household Sync Export

This task has the following parameters:

- Batch Exporter Type - Defaults to BI/Analytics and cannot be changed.
- Export type - Defaults to Export all active records and cannot be changed.
- Specify export filename - The setting of the Retail Insights Household Sync Default Filename property is displayed and cannot be changed.
- Specify customer-household association export filename: The setting of the Retail Insights Household Customer Association Sync Default Filename is displayed and cannot be changed.

Household Export File - BI/Analytics

The household export file is pipe-delimited, and typically contains the unique identifier for each household, as well as some hard-coded fields that are required by the BI/Analytics system.

The export file does not include a header row. Instead, there is a separate file with the same name as the household sync export file, but with an extension of .ctx, that includes the titles of each column in the export file. For example, if the household sync export file name is W_HOUSEHOLD_DS.dat, the file containing the header row names is W_HOUSEHOLD_DS.dat.ctx.

Household Customer Association Export File - BI/Analytics

The household customer association export file is pipe-delimited, and typically contains the unique identifier for each household and the customer ID for each customer associated with the household. It also typically contains some hard-coded fields that are required by the BI/Analytics system.

The export file does not include a header row. Instead, there is a separate file with the same name as the household customer association file, but with an extension of .ctx, that includes the titles of each column in the export file. For example, if the household customer association export file name is W_RTL_CUST_HOUSEHOLD_DS.dat, the file containing the header row names is W_RTL_CUST_HOUSEHOLD_DS.dat.ctx.

The information in these files is formatted as binary data.

Rebuild Category Totals

This task has the following parameters:

Customer Department Totals Rebuild Period:

- Select whether to recalculate totals based on activity within the most recent number of days, months, or years.
- Enter the number of days, months, or years to include. You can enter a maximum of 3 years, 36 months, or 1095 days.

Before you can submit the job, you need to acknowledge the warning at the bottom area of the Review step, indicating that the task will recalculate customer department totals, and that this step cannot be undone.

When the job runs, the records in the CST_DEPARTMENT_TOTALS table are cleared for all Customer activity during the specified rebuild period, and then rebuilt. The CREATE_DATE is set to the date when the job is run, and the CREATE_USER is set to ORCE. Return transactions are not included in the category totals.

BI/Analytics Package Exporter

This task has no additional parameters.

This task packages the export files to the BI/Analytics system, and must be the last task in a single job that includes all other exports to the BI/Analytics system.

The package exporter creates a zip file that includes the export files from the sync tasks run within the job, so that the zip file is ready for the BI/Analytics system.

The zip file name is from the Retail Insights Zip Package Default Filename property.

For more information on the export tasks and the generated export files, see Customer Sync Export, Customer Address Sync Export, Customer Attributes Sync Export, Customer Household Sync Export, and Segment Sync Export.

Reset Customer YTD Totals

This task has the following parameter.

- Year of data being reset - This Selection Menu determines the year for which the YTD data is reset.

Automated Associate Assignment

This task has the following parameters:

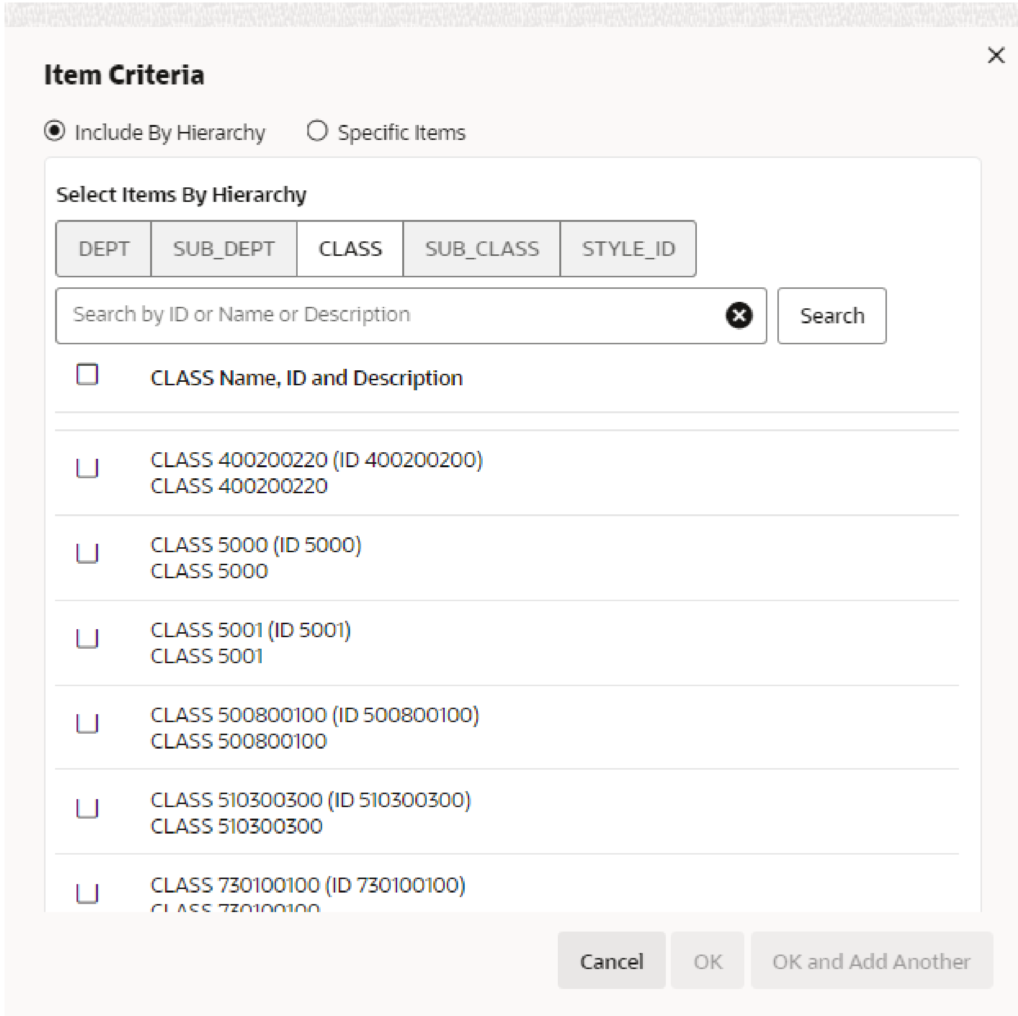
- Date Range Type - This Selection Menu determines the Date Range used.

- Start Date - This Calendar Menu determines the first date of the Date Range (only available if Date Range Type is set to Specific Date Range).
- End Date - This Calendar Menu determines the final date of the Date Range (only available if Date Range Type is set to Specific Date Range).
- Assignment Method - These Radio Buttons determine the selection method used to assign an Associate to a Customer. These Radio Buttons have the following options:
  – Sold most frequently - The Associate who performed the most sales to each Customer.
  – Sold largest total amount - The Associate who sold the largest total amount to each Customer.
- Assignment Interval - Number of days between Associate reassignments for a Customer. After the Job assigns an Associate to a Customer, this is the number of days the Job will wait before changing that assignment.
- Assignment Role - This Selection Menu determines the Associate Role used for the Associate assignment.
- Criteria specification - Additional criteria to use when assigning the Associate. This Selection Menu has the following options:
  – No additional criteria - This Job will not require any additional criteria.
  – Select criteria from list - Add Item or Location criteria to the Job. A transaction must match one of the entered criteria to be used in determining the Associate to be assigned to the Customer.
- When Select criteria from list is selected, the Item and Location Criteria appear. To configure Item Criteria, perform on of the following options:
  – Use the **Quick Add** option to enter a known **ID** which you wish to associate with this task. Click **Add**.
  – Click the **Actions Menu** and select **Add Item Criteria**.
  – Click **+Add Item Criteria**.

  Include by Hierarchy

  There are two ways to search for items in the Include by Hierarchy option, either:
  – Select one of the **Hierarchy** choices (**Department** or **Class**, for example) and click **Search** to retrieve all associated hierarchies.
  – Select one of the **Hierarchy** choices and enter part or all of the **ID**, **Name**, or **Description** in the field, and click **Search** to retrieve your refined search criteria.
  – After locating the items, then **select** or **clear** the check boxes from the list.

Figure 12-34 Item Criteria - Include By Hierarchy



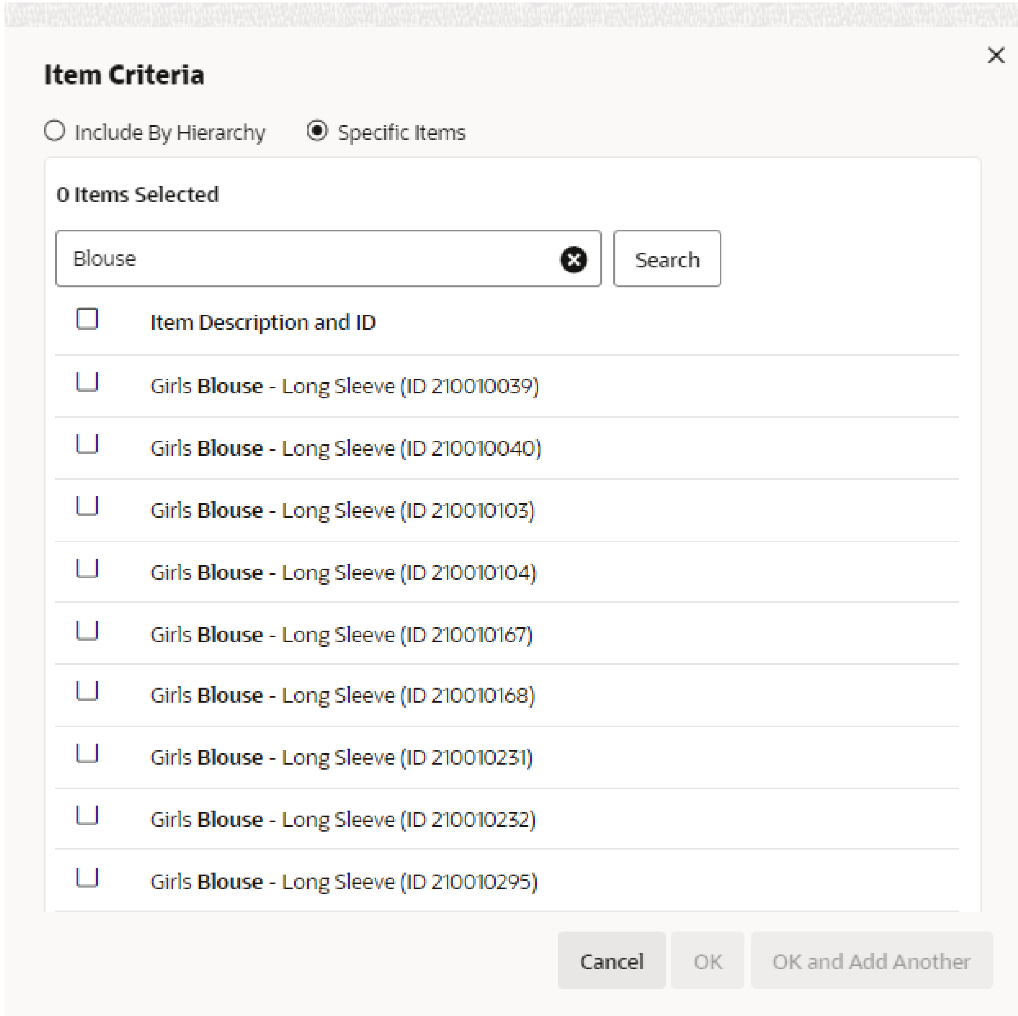
- Click **OK** to add the item to the Task or click **OK and Add Another** to add another item. Click **Cancel** to close the window without adding the item.
- Click **X** to remove added items.

Specific Items

To search for items by specific items:

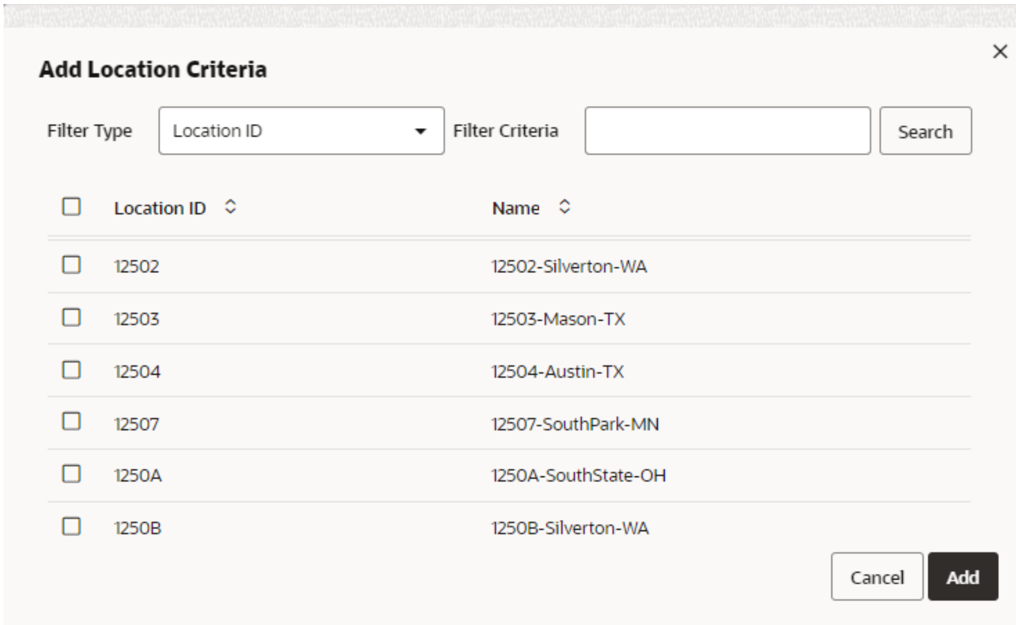
- Enter the **ID** or **Description** of the Item.
- Click **Search**.

Figure 12-35 Item Criteria - Specific Items



  - **Select** or **clear** the check boxes from the list.
  - Click **OK** to add the item to the Task or click **OK and Add Another** to add another item. Click **Cancel** to close the window without adding the item.
  - Click **X** to remove items.
- When Select criteria from list is selected, the Item and Location Criteria appear. To configure Location Criteria do the following:
  - Click **+Add Location Criteria**.

Figure 12-36 Add Location Criteria



- Click the list arrow to select a **Filter Type**.
- Click **Search** to return all Locations that meet the Filter Type Criteria.
- You can use the Filter Criteria field before or after a search. The Filter Criteria is determined by your implementer.

> **Note:**
>
> The Filter Criteria field accepts partial input.

- **Select** or **clear** the check boxes from the list.
- Click **Add** to add the location to the task. Click **Cancel** to close the window without adding the location.
- Click **X** to remove added locations.

Associate Mass Reassignment

This task has the following parameters:

- Assignment Method - Method used for reassigning the Customers. These Radio Buttons have the following options:
  - Reassign - Assign all Customers to one Associate.
  - Distribute among - Distribute Customers among all Associates at the current Associate's location.
- Currently assigned to - Displays the Associate who is having their Customers reassigned. Perform a Change/Add Associate procedures to change the Associate.
- Selection Menu for the Associate Role that is used for the new Associates.

- Reassign to - Displays the User ID(s) of the Associate(s) to whom the Customers are reassigned. Perform a Change/Add Associate procedures to add an Associate to the field. Only displayed if the Assignment Method is set to Reassign.

  Associate reassignment selections have the following rules:

  – This field is only displayed when Reassign is selected as the Assignment Method.

  – The Associates must all belong to the same Location.

  – If a new Associate does not belong to the same Location as previously selected Associates, the previously selected Associates are removed and the new Associate is entered.

  – If the Associate selected does not belong to the Location to which the currently assigned Associate, a confirmation response is displayed.

Unstratified Segment

This Task has the following parameter:

- Customer Segment - This Selection Menu determines the Unstratified Segment that is counted.

Stratified Segment

This Task has the following parameter:

- Customer Segment - This Selection Menu determines the Stratified Segment that is organized and counted.

Segment Sync Export

Before you submit this task, you must select an export target system of either Marketing for a system such as Responsys, or BI/Analytics for a system such as Retail Insights. The Supported Batch Exporter Types property controls which of these options are available. See the *Oracle Retail Customer Engagement Implementation Guide* for more information about System Configuration.

Segment Sync Export - Marketing

If you select an export target system of Marketing, the following options are displayed:

- Specify export filename - These fields control the creation of the CSV file containing new or updated segment records. At least one entry (prefix, static name, or suffix) is required:

  – Prefix - The date and time stamp format to use as a prefix for naming the export file:

    * no prefix - Do not use a date and time stamp prefix on the file name.

    * yyyyMMdd_HHmmss - Use a date and time stamp prefix in this format (for example, 20160630_123456 where the year is 2016, the month is June, the date is 30, and the time is 12:34:56).

    * yyyy-MM-dd_HHmmss - Use a date and time stamp prefix in this format (for example, 2016-06-30-123456, where the year is 2016, the month is June, the date is 30, and the time is 12:34:56).

    The setting of the Responsys Export Filename Default Prefix property defaults.

  - Static Name - The text string to include in the file name between the prefix and suffix, if any. The setting of the Responsys Segment Sync Default Filename defaults.

    You can include multiple segments in the same task. However, if you include multiple segment sync tasks to Marketing in the same job, you need to specify a unique static name for each to avoid overwriting one export sync file with another.
  - Suffix - The date and time stamp format to use as a suffix for naming the export file. The date and time stamp format options for the suffix are the same as for the prefix, described above. The setting of the Responsys Export Filename Default Suffix property defaults.
  - Filename - Displays an example of the export file name with the prefix and suffix format, if any. This field is blank if you have not yet selected a prefix format, suffix format, or static name.
- Strata Type - Defines the type of Segments that can be included in the export file:
  - Unstratified Segment - Unstratified Segments and Manual Segments are available for selection in the dropdown list.
  - Stratified Segment - Stratified Segments are available for selection in the drop-down list.

> **Note:**
>
> A single Job Definition can include either Unstratified/Manual Segments or Stratified Segments, but not both. If you have selected one or more Segments and then change the setting of the Strata Type, the previously selected Segments are cleared from the listing for the Job Definition.

- Seq N Segment = Use the drop-down list to select each Segment to include in the export file. Only Segments that have the Publish To Batch Exporter flag selected and that match the selected Strata Type are available for selection from the drop-down. As you select each Segment, it is added to the Seq. and Attribute listing between the Strata Type and the Seq N Segment drop-down.
- Seq and Attribute - Use the drop-down list to select each attribute to include in the export file. Only attributes that have the Publish To Batch Exporter and Open Access flags selected are available for selection from the drop-down.

Customer Segment File for Marketing: Stratified Segments

The customer segment export file for one or more stratified segments contains the following information:

- Customer ID.
- Customer primary email address.
- For each Segment included in the Job Definition:
  - A column with a setting of 1 if the customer is included in the Segment, or a setting of 0 if the customer is not included in the Segment.
  - The Segment stratification format (RANGE or NTILE).
  - The Segment strata type (Customer, Loyalty, or Transaction).

  - The data that the strata is based on (Customer for a Customer strata type; Loyalty Summary or Loyalty Detail for a Loyalty strata type; Header or Detail for a Transaction strata type).
  - The field to stratify on. See Creating a Segment or Personal List in the Segments chapter for a list of possible fields based on the selected strata type.
  - The strata ID.
  - The strata value.

Customer Segment Export File for Marketing: Unstratified Segments

The customer segment export file for one or more unstratified or manual segments contains the following information:

- Customer ID.
- Customer primary email address.
- Segment name.
- A column for each Segment included in the Job Definition, with a setting of 1 if the customer is included in the Segment or a setting of 0 if the customer is not included in the Segment.

Segment Sync Export - BI/Analytics

If you select a Batch Exporter Type of BI/Analytics, the following parameters are displayed:

- Segment Filename - The setting of the Retail Insights Segment Sync Default Filename property is displayed and cannot be changed.
- Segment Attributes Filename - The setting of the Retail Insights Segment Attributes Sync Default Filename property is displayed and cannot be changed.
- Customer Segment Association Filename - The setting of the Retail Insights Segment Customer Association Sync Default Filename property is displayed and cannot be changed.
- Attribute Metadata Filename - The setting of the Retail Insights Attribute Metadata Sync Default Filename property is displayed and cannot be changed.
- Customer Segment Category Filename - The setting of the Retail Insights Customer Segment Category Sync Default Filename property is displayed and cannot be changed.
- Seq N Segment = Use the drop-down list to select each Segment to include in the export file. Only Segments that have the Publish To Batch Exporter flag selected are available for selection from the drop-down. As you select each Segment, it is added to the Seq. and Attribute listing.
- Seq and Attribute - Use the drop-down list to select each attribute to include in the export file. Only attributes that have the Publish To Batch Exporter and Open Access flags selected are available for selection from the drop-down. Select from the following types of attributes:
  - Varchar Type Attribute - The Retail Insights Varchar Type Attribute Allowed Count property controls the number of varchar type attributes you can select for export.
  - Numeric Type Attribute - The Retail Insights Numeric Type Attribute Allowed Count property controls the number of numeric type attributes you can select for export.
  - Data Type Attribute - The Retail Insights Date Type Attribute Allowed Count property controls the number of data type attributes you can select for export.

- Suffix - The date and time stamp format to use as a suffix for naming the export file. The date and time stamp format options for the suffix are the same as for the prefix, described above, with a default of no suffix.

Segment Export File - BI/Analytics

The customer segment export file contains the following information:

- Segment ID.
- Segment name.
- Datasource, which is hard-coded to 1.

The file also includes the values for attributes whose names match the following, if they exist:

- CUSTSEG_TYPE (if this attribute is not defined, a cluster type of Rule Based is passed)
- AGE_RANGE
- SEX_MF_CODE
- FAMILY_SIZE
- OCCUPATION_CODE
- EDUCATION_BCKGND_CODE
- ETHNICITY_CODE
- NATIONALITY_CODE
- RELIGION_CODE
- SOCAL_CLASS_CODE
- FAMILY_LIFE_CYCL_CODE
- REGION_CODE
- METRO_AREA_SIZE
- POPULATION_DENSITY
- CLIMATE_CODE
- BENEFIT_SOUGHT_CODE
- USAGE_RATE
- READINESS_TO_BUY_CODE
- OCCASION_CODE
- ACTIVITY_CODE
- INTEREST_CODE
- OPINION_CODE
- ATTITUDE_CODE
- VALUE_CODE
- EFFECTIVE_START
- EFFECTIVE_END
- CUSTSEG_SRC_TYPE
- ANNL_INCOME_RANGE

- CUSTSEG_DESC

The above attributes in Customer Engagement map to segment properties in Retail Insights.

The export file does not include a header row. Instead, there is a separate file with the same name as the segment export file, but with an extension of .ctx, that includes the titles of each column in the export file. For example, if the segment export file name is W_RTL_CUSTSEG_DS.dat, the file containing the header row names is W_RTL_CUSTSEG_DS.dat.ctx.

Segment Attributes Export File - BI/Analytics

The customer segment attributes export file contains the following information:

- Segment ID.
- The CUSTSEG_TYPE attribute value. If this attribute is not defined, a cluster type of Rule Based is passed.
- The CUSTSEG_SRC_TYPE attribute value, if any. Typically set to CUSTOMER.
- The value for each attribute assigned to the segment and selected for export.
- Datasource, which is hard-coded to 1.

The attribute mapping is defined in the generated metadata file. The file name for the metadata file is defined in the Retail Insights Attribute Metadata Sync Default Filename property.

The export file does not include a header row. Instead, there is a separate file with the same name as the segment attributes export file, but with an extension of .ctx, that includes the titles of each column in the export file. For example, if the segment attributes export file name is W_RTL_LYL_TRANS_DS.dat, the file containing the header row names is W_RTL_LYL_TRANS_DS.dat.ctx.

Customer Segment Association Export File - BI/Analytics

The segment customer association export file contains the following information for the customers included in a segment:

- Segment ID.
- Customer ID.
- Datasource, which is hard-coded to 1.

The export file does not include a header row. Instead, there is a separate file with the same name as the segment association export file, but with an extension of .ctx, that includes the titles of each column in the export file. For example, if the segment association export file name is W_RTL_CUST_CUSTSEG_DS.dat, the file containing the header row names is W_RTL_CUST_CUSTSEG_DS.dat.ctx.

Attribute Metadata Export File - BI/Analytics

This export file defines mapping for attributes. See the Customer Attribute Metadata Export File - BI/Analytics for an example of attribute mapping.

The export file does not include a header row. Instead, there is a separate file with the same name as the attribute metadata export file, but with an extension of .ctx, that includes the titles of each column in the export file. For example, if the attribute metadata export file name is W_RTL_INT_METADATA_G.dat, the file containing the header row names is W_RTL_INT_METADATA_G.dat.ctx.

Customer Segment Category - BI/Analytics

Currently, an empty customer segment category export file is created.

Points/Awards Transfer Notifications Export

See Points/Awards Transfer Notification Export for background on this job. This task has the following parameters:

- Please select transfer notification type - Indicates the type of transfer notifications to export: All, Awards Only, or Points Only.
- Specify Awards Transfer Export Filename - These fields control the creation of the CSV file containing contact information for Customers originating or receiving Award Coupon transfers. At least one entry (prefix, static name, or suffix) is required:
  - Prefix - The date and time stamp format to use as a prefix for naming the export file:
    - no prefix - Do not use a date and time stamp prefix on the file name.
    - yyyyMMdd_HHmmss - Use a date and time stamp prefix in this format (for example, 20170830_123456 where the year is 2017, the month is August, the date is 30, and the time is 12:34:56).
    - yyyy-MM-dd_HHmmss - Use a date and time stamp prefix in this format (for example, 2017-08-30-123456, where the year is 2017, the month is August, the date is 30, and the time is 12:34:56).

    The setting of the Responsys Export Filename Default Prefix property defaults.
  - Static Name - The text string to include in the file name between the prefix and suffix, if any. The setting of the Responsys Awards Transfer Sync Default Filename defaults.
  - Suffix - The date and time stamp format to use as a suffix for naming the export file. The date and time stamp format options for the suffix are the same as for the prefix, described above. The setting of the Responsys Export Filename Default Suffix property defaults.
  - Filename - Displays an example of the export file name with the prefix and suffix format, if any. This field is blank if you have not selected a prefix format, suffix format, or static name.
- Specify Points Transfer Export Filename - These fields control the creation of the CSV file containing contact information for Customers originating or receiving Loyalty Points transfers. At least one entry (prefix, static name, or suffix) is required:
  - Prefix - The date and time stamp format to use as a prefix for naming the export file:
    - no prefix - Do not use a date and time stamp prefix on the file name.
    - yyyyMMdd_HHmmss - Use a date and time stamp prefix in this format (for example, 20170830_123456 where the year is 2017, the month is August, the date is 30, and the time is 12:34:56).
    - yyyy-MM-dd_HHmmss - Use a date and time stamp prefix in this format (for example, 2017-08-30-123456, where the year is 2017, the month is August, the date is 30, and the time is 12:34:56).

    The setting of the Responsys Export Filename Default Prefix property defaults.
  - Static Name - The text string to include in the file name between the prefix and suffix, if any. The setting of the Responsys Awards Transfer Sync Default Filename defaults.

- Suffix - The date and time stamp format to use as a suffix for naming the export file. The date and time stamp format options for the suffix are the same as for the prefix, described above. The setting of the Responsys Export Filename Default Suffix property defaults.
- Filename - Displays an example of the export file name with the prefix and suffix format, if any. This field is blank if you have not selected a prefix format, suffix format, or static name.

Award Transfer Notifications Sync Export File

The Award Transfer Notification sync export file contains the following information:

- From Card Number - The Card number originating the transfer. The number is partially masked with X's.
- To Card Number - The Card number receiving the transfer. The number is partially masked with X's.
- From email address - The primary email address of the Customer originating the transfer. Included only if the Customer's contact permissions allow it.
- From phone number - The primary phone number of the Customer originating the transfer. Included only if the Customer's contact permissions allow it.
- To email address - The primary email address of the Customer receiving the transfer. Included only if the Customer's contact permissions allow it.
- To phone number - The primary phone number of the Customer receiving the transfer. Included only if the Customer's contact permissions allow it.
- Date and time when the transfer took place.
- The amount of the Award Coupon. Might be 0 for an Entitlement Coupon.

An entry for a transfer is included in the file only if there is phone or email contact information for either the originator of the transfer or the recipient, and if an interactive notification request was not successfully sent.

Points Transfer Notifications Sync Export File

The Award Transfer sync export file contains the following information:

- From Card Number - The Card number originating the transfer. The number is partially masked with X's.
- To Card Number - The Card number receiving the transfer. The number is partially masked with X‚Äôs.
- From email address - The primary email address of the Customer originating the transfer. Included only if the Customer's contact permissions allow it.
- From phone number - The primary phone number of the Customer originating the transfer. Included only if the Customer's contact permissions allow it.
- To email address - The primary email address of the Customer receiving the transfer. Included only if the Customer's contact permissions allow it.
- To phone number - The primary phone number of the Customer receiving the transfer. Included only if the Customer's contact permissions allow it.
- Date and time when the transfer took place.
- The number of points transferred.

An entry for a transfer is included in the file only if there is phone or email contact information for either the originator of the transfer or the recipient, and if an interactive notification request was not successfully sent.

Export Card Series

This Task has the following parameters:

- Card Prefix - This Text Field indicates the Card Prefix of the Card Definition to be exported.
- Card Series - This Text Field indicates the Card Series of the Card Definition to be exported.

Release Expired PreAuth

This Task has no additional parameters:

Notify Card Renewal

This Task has the following parameters:

- Card Program - This Selection Menu determines the Card Program for which to notify Customers.
- Period Type - This Selection Menu determines the type of time period used to determine the notification time frame.
- Number of Periods - This Text Field defines the number of periods (from Period Type) before the Card expiration date that a Customer is notified of their Card's coming expiration.

Tender Account Sync

This Task has the following parameter:

- Tender Program - The Tender Program to include in the export files. The Task generates an export file of Tender Accounts and an export file of Tender Account Activity.

Tender Account Export File

The tender account export file contains the following information for each Tender account:

- Tender account ID.
- Last activity date.
- Effective date.
- Account expiry date.
- Card serial number.
- Card number.
- Card activation date.
- Date when card was first used.
- Date when card was last used.
- Card expiry date.

- Date when the card was associated with the customer.
- Start date, if any.
- End date., if any
- Customer ID.
- Primary flag, set to 1 if the customer is the primary account holder.
- Status indicator if Active or Inactive.
- Current balance on the account.
- Book balance for accounting purposes.
- Amount of balance that is frozen or unusable.
- Program ID to uniquely identify the tender program.
- Currency typecode.
- Usage count indicating the total number of times the tender account has been accessed for a transaction.
- Total number of lifetime credits for the account.
- Total number of lifetime debits for the account.
- Date created.
- User who created the account.
- Date updated.
- Use who updated the account.

Tender Account Activity Export File

The tender account activity export files contains the following information:

- Tender account ID.
- Program ID to uniquely identify the tender program.
- Unique identifier for the account activity record.
- Authorization code.
- Customer ID.
- Card number.
- Flag indicating whether the transaction was voided.
- Code to categorize the type of transaction or activity.
- Date and time when the activity took place.
- Amount of the activity or transaction.
- Currency typecode.
- Operator ID from the POS.
- Transaction ID from the POS.
- Transaction ID generated by Customer Engagement.
- Retail location where the activity took place.
- ID or serial number identifying the workstation where the activity took place.

- Date that corresponds to an accounting period fiscal day at the retail store.
- Account ID affected by the activity.
- ID of the activity.
- Flag indicating if the card was swiped during the activity.
- Error code, if any.
- User comments on the activity, if any.
- Code identifying the currency requested for the activity.
- Amount of currency being exchanged.
- Currency exchange rate.
- If the activity was a Card Merge, the unique ID for the source account of the merge.
- Unique identifier for the franchisee, if any.
- Account adjustment reason code, if any.
- Expiration date for the activity.
- Date created.
- User who created the activity.
- Date updated.
- Use who updated the activity.

OCDS Sync

This Task requires SystemConfig or SystemAdmin authority, and has the following parameters:

- Item and Merchandise Hierarchy - Select this option to request item and merchandise hierarchy data from the Omnichannel Cloud Data Service, including:
  - Merchandise Hierarchy
  - Item Header
  - Item Image
  - Item Price
- Location and Franchise - Select this option to request location and franchise data from the Omnichannel Cloud Data Service, including:
  - Store Location
  - Organizational Hierarchy/Franchise
- Reset Last Run Date - Select this option to retrieve all data, regardless of date created or updated; otherwise, leave this option unselected to request only data that has been created or updated since the last time you ran the OCDS data sync.

See Bulk Imports through Oracle Cloud Data Service (OCDS) in the *Batch Processing and Web Services Guide* for more information on the integration and the data received.

Issue Anniversary Awards

This Task has the following parameters:

- Award Program - This Selection Menu determines the Award Program to use for the Anniversary Awards.
- Coupon Prefix - This Text Field indicates the Coupon Prefix for the Coupons generated.
- Amount - This Text Field defines the amount for the Coupons generated.
- Expiration Period Type - This Selection Menu indicates the type of period used in determining when the Coupons will expire.
- Expiration Number of periods - This Selection Menu determines the number of periods (from Expiration Period Type) that will pass before the Coupons expire (not displayed if Expiration Period Type is set to Use Program).
- The Expiration Date is Based On - This Selection Menu determines how the Coupon expiration dates are determined. This Selection Menu has the following options:
  - Run Date - The Coupon expiration dates are calculated from the date the Task runs.
  - Customer Date - The Coupon expiration dates are calculated from the anniversary date.
- Anniversary Award Type - This Selection Menu determines the type of anniversary for which Awards are issued.
  - Birthday - Customer birthday.
  - Signup - Customer signup.
- Generate customer note - This toggle determines whether a Customer note is generated when a Coupon is generated for a Customer.
- Period Type - This Selection Menu indicates the type of period used in determining the window of dates for which Awards are issued.
- Num of Periods Before Run Date - This Text Field defines the number of periods (from Period Type) before the run date for which Awards are issued.
- Num of Periods After Run Date - This Text Field defines the number of periods (from Period Type) after the run date for which Awards are issued.

Export File

The export file for either a birthday or sign-up anniversary contains the following information:

- Award Account information including account number, Card number, and Card serial number.
- Customer information including name, address, email, phone, and anniversary date.
- Award information including the amount of coupon, coupon number, and the coupon expiration date. See the *Oracle Retail Customer Engagement Implementation Guide* for more information on export templates.

Notify Awards Expire

This Task has the following parameters:

- Award Program - This Selection Menu determines the Award Program for which notifications are sent.
- Period Type - This Selection Menu indicates the type of period used for determining the award expiration notification window.

- Number of Periods - Defines the number of periods (from Period Type) of the notification window.

Award Sync Export

This task has the following parameters:

- Select target batch exporter system - Set to Marketing by default.
- Export type - Controls which records to include in the export file:
  - Export all active records - Include all active award account and award coupon records.
  - Export updated records only - Include award account and award coupon records only if they have changed since the last export. With this selection, the Once Immediately and Once Later options for scheduling the job are not available

  Note that, regardless of your selection here, the first time you run the export all, active award account and award coupon records are included.
- Specify export filename - These fields control the creation of the file containing new or updated award account records.

  At least one entry (prefix, static name, or suffix) is required:
  - Prefix - The date and time stamp format to use as a prefix for naming the export file.
    * no prefix - Do not use a date and time stamp prefix on the file name.
    * yyyyMMdd_HHmmss - Use a date and time stamp prefix in this format (for example, 20160630_123456 where the year is 2016, the month is June, the date is 30, and the time is 12:34:56).
    * yyyy-MM-dd_HHmmss - Use a date and time stamp prefix in this format (for example, 2016-06-30-123456, where the year is 2016, the month is June, the date is 30, and the time is 12:34:56).

    The setting of the Responsys Export Filename Default Prefix property defaults.
  - Static Name - The text string to include in the file name between the prefix and suffix, if any. The setting of the Responsys Award Account Sync Default Filename property defaults.
  - Suffix - The date and time stamp format to use as a suffix for naming the export file. The date and time stamp format options for the suffix are the same as for the prefix, described above. The setting of the Responsys Export Filename Default Suffix property defaults.
  - Filename - Displays an example of the export file name with the prefix and suffix format, if any. This field is blank if you have not yet selected a prefix format, suffix format, or static name.
- Specify export filename - These fields control the creation of the file containing new or updated award coupon records.

  At least one entry (prefix, static name, or suffix) is required:
  - Prefix - The date and time stamp format to use as a prefix for naming the export file.
    * no prefix - Do not use a date and time stamp prefix on the file name.
    * yyyyMMdd_HHmmss - Use a date and time stamp prefix in this format (for example, 20160630_123456 where the year is 2016, the month is June, the date is 30, and the time is 12:34:56).

    * yyyy-MM-dd_HHmmss - Use a date and time stamp prefix in this format (for example, 2016-06-30-123456, where the year is 2016, the month is June, the date is 30, and the time is 12:34:56).

  The setting of the Responsys Export Filename Default Prefix property defaults.

  – Static Name - The text string to include in the file name between the prefix and suffix, if any. The setting of the Responsys Award Account Sync Default Filename property defaults.
  – Suffix - The date and time stamp format to use as a suffix for naming the export file. The date and time stamp format options for the suffix are the same as for the prefix, described above. The setting of the Responsys Export Filename Default Suffix property defaults.
  – Filename - Displays an example of the export file name with the prefix and suffix format, if any. This field is blank if you have not yet selected a prefix format, suffix format, or static name.
- Award Program = Use the drop-down list to select an award program to include in the export files.

Award Account Export File

The award account export file contains the following information:

- Customer ID.
- Card number.
- Card active flag (set to 1 if active; if not active, indicates a deactivation or merge).
- Card expiration date.
- First used date.
- Last used date.
- Program name.
- Program ID.
- Update date.
- Currency code.
- Account expiration date.
- Account ID.
- Award balance.
- E-award count.
- Entitlement count.

Award Coupon Export File

The award coupon export file contains the following information:

- Customer ID.
- Card number.
- Account ID.
- Program ID.

- Coupon typecode (e-award or entitlement).
- Coupon ID.
- Coupon balance, if any; for example, an entitlement for a line item discount would not have a balance.
- Currency code.
- Deal name, if any; for example, a deal name is specified for an entitlement.
- Deal ID, if any; for example, a deal ID is specified for an entitlement.
- Expiration date.
- Update date.

Update Award Program Customer Map Parameters

This task has no additional parameters.

Distribute Loyalty Awards

This Task has the following parameter:

- Export File - This Text Field defines the name of the export file created by the Task.

Note that the Create Loyalty Awards process should be run before this process.

Export File

The export file contains information about the Award issued, the Account through which the Award was earned, and the Customer to whom the Award is being issued. See the *Oracle Retail Customer Engagement Implementation Guide* for more information on export templates.

Create Loyalty Awards

This Task has the following parameters:

- Generate customer note - This toggle indicates whether a Customer note is generated when a Loyalty Award is generated for a Customer.
- Each Check Box in the List indicates whether the associated Loyalty Program or Program Level is included in the Task:
  - To select all programs and all levels [default], click the Top Level check box.
  - To deselect all programs and all levels, Clear the Top Level check box.
  - To select or deselect individual program levels, click the Enabled Check Box for the level. If there is a check mark in the box, the level is included in the task.

Export Files

When the award(s) are exported, three files are created: an E-Award Export File, an Entitlement Coupons File, and a Loyalty Level Movement Export File. See the *Oracle Retail Customer Engagement Implementation Guide* for more information on export templates.

Earn Loyalty Points

This Task has no additional parameters.

Expire Loyalty Points

This Task has no additional parameters.

Reset Loyalty YTD Points

This task has no additional parameters.

Loyalty Account Sync Export

Before you submit this task, you must select an export target system of either Marketing for a system such as Responsys, or BI/Analytics for a system such as Retail Insights. The Supported Batch Exporter Types property controls which of these options are available. See the *Oracle Retail Customer Engagement Implementation Guide* for more information about System Configuration.

Loyalty Account Sync Export - BI/Analytics

If you select BI/Analytics as the export target system, the following options are displayed:

- Export type - Controls which records to include in the export file:
  - Export all active records - Include all active loyalty account records.
  - Export updated records only - Include loyalty account records only if they have changed since the last export. With this selection, the Once Immediately and Once Later options for scheduling the job are not available.

  Note that, regardless of your selection here, the first time you run the export all active loyalty account records are included.
- Specify export filename - If you selected an Export type of BI/Analytics, the setting of the Retail Insights Loyalty Account Sync Export Default Filename property is displayed and cannot be changed.

Loyalty Account Sync Export File - BI/Analytics

The customer export file is a pipe-delimited values file that typically contains the following information:

- Loyalty Account Id
- Card Serial Number - Sixteen-digit number embossed on the card
- Primary Customer Number
- Loyalty Program Id
- Loyalty Program Level Id
- Account Active Flag
- Account Expiry Flag
- Earned Points Balance

- Escrow Points Balance
- Last Award Processed Date
- Last Accrual Date
- Last Program Level Change Date
- Last Transaction Date

The export file does not include a header row. Instead, there is a separate file with the same name as the loyalty account sync export file, but with an extension of .ctx, that includes the titles of each column in the export file. For example, if the loyalty account sync export file name is W_RTL_LYL_ACCOUNT_DS.dat, the file containing the header row names is W_RTL_LYL_ACCOUNT_DS.ctx.

Loyalty Account Sync Export - Marketing

If you select an export target system of Marketing, the following options are displayed:

- Select target batch exporter system - Set to Marketing by default.
- Export type - Controls which records to include in the export file:
  - Export all active records - Include all active loyalty records.
  - Export updated records only - Include loyalty records only if they have changed since the last export. With this selection, the Once Immediately and Once Later options for scheduling the job are not available.

  Note that, regardless of your selection here, the first time you run the export all active loyalty records are included.
- Specify export filename - These fields control the creation of the CSV file containing new or updated loyalty records. At least one entry (prefix, static name, or suffix) is required:
  - Prefix - The date and time stamp format to use as a prefix for naming the export file:
    - None - Do not use a date and time stamp prefix on the file name.
    - yyyyMMdd_HHmmss - Use a date and time stamp prefix in this format (for example, 20160630_123456 where the year is 2016, the month is June, the date is 30, and the time is 12:34:56).
    - yyyy-MM-dd_HHmmss - Use a date and time stamp prefix in this format (for example, 2016-06-30-123456, where the year is 2016, the month is June, the date is 30, and the time is 12:34:56).

    The setting of the Responsys Export Filename Default Prefix property defaults.
  - Static Name - The text string to include in the file name between the prefix and suffix, if any. The setting of the Responsys Loyalty Account Sync Default Filename property defaults.
  - Suffix - The date and time stamp format to use as a suffix for naming the export file. The date and time stamp format options for the suffix are the same as for the prefix, described above, with a default of no suffix.
  - Filename - Displays an example of the export file name with the prefix and suffix format, if any. This field is blank if you have not yet selected a prefix format, suffix format, or static name.
- Loyalty Program - Select a single loyalty program to include in the export file.

Loyalty Account Sync Export File - Marketing

The customer export CSV file contains the following information:

- Customer ID.
- Card number.
- Card active flag (set to 1 if active; if not active, indicates a deactivation or merge).
- Card expiration date.
- First use date.
- Last use date.
- Life-to-date balance.
- Year-to-date balance.
- Earned point balance.
- Escrow point balance.
- Program name.
- Level ID.
- Level name.
- Account expiration date.
- Update date.
- Account ID.

Loyalty Account Activity Sync Export

This task has the following parameters:

- Batch Exporter Type - Defaults to BI/Analytics and cannot be changed.
- Export Type - Controls which records to include in the export file:
  - Export all active records - Include all active loyalty account records.
  - Export updated records only - Include loyalty account records only if they have changed since the last export. With this selection, the Once Immediately and Once Later options for scheduling the job are not available

  Note that, regardless of your selection here, the first time you run the export all active loyalty account records are included.
- Specify export filename - The setting of the Retail Insights Loyalty Transaction Data Sync Export Default Filename property is displayed and cannot be changed.

Loyalty Account Activity Export File - BI/Analytics

The export file is pipe-delimited, and typically contains the following information:

- Loyalty Transaction ID - Main identifier of the loyalty account activity.
- Loyalty Program ID - Unique identifier of the loyalty program.
- Loyalty Program Level ID - Unique identifier of the loyalty program level.
- Loyalty Account ID - Main identifier of the loyalty account associated with the transaction.

- Card Serial Number - The card associated with the loyalty account.
- Customer Number - Unique identifier of the primary customer associated with the card.
- Transaction Date - Date when the loyalty transaction took place.
- Transaction Type Code - Includes Activate, Deactivate, Issue, PointRecovery, Return, Award, Expire, ChangeLevel, SustainExtension, AccountMerge, ResetExpirationDate, TransferOut, and TransferIn. Inquiries are not included.
- Transaction Trigger Type - System where the transaction was triggered from, such as POS, CRM server, or loyalty admin module.
- Retail Transaction ID - Unique identifier of the transaction, provided by the POS System.
- Points Accrued - Number of points accrued for an Issue, Point Recovery, Earn, or Return. For a return, this is a negative number.
- Points Redeemed - Number of Points Redeemed for an Award.
- Bonus Points - Number of points issued as bonus points for an Issue, Point Recovery, Earn, or Return. For a return, this is a negative number.
- Points Expired - Number of points expired as a part of this transaction.
- Transaction Amount - The sale transaction amount that has earned the given points in original currency for an Issue, Point Recovery, Earn, or Return. For a return, this is a negative number.
- Original Currency Code - The currency code of the transaction amount.
- Converted Amount - The sale transaction amount that has earned the given points in program currency for an Issue, Point Recovery, Earn, or Return. For a return, this is a negative number.
- Program Currency Code - The currency code of the program.
- Location ID - Retail location ID where the transaction occurred.
- Points Transferred Out - The total number of points transferred out for the transaction. Included as a negative number when the transaction type is Transfer Out.
- Points Transferred In - The total number of points transferred in for the transaction. Included as a positive number when the transaction type is Transfer In.

The export file does not include a header row. Instead, there is a separate file with the same name as the loyalty account activity export file, but with an extension of .ctx, that includes the titles of each column in the export file. For example, if the loyalty account activity export file name is W_RTL_LYL_TRANS_DS.dat, the file containing the header row names is W_RTL_LYL_TRANS_DS.dat.ctx.

Loyalty Program Sync Export

This task has the following parameters:

- Batch Exporter Type - Defaults to BI/Analytics and cannot be changed.
- Export Type - Controls which records to include in the export file:
  - Export all active records - Include all active loyalty programs.
  - Export updated records only - Include loyalty programs only if they have changed since the last export.

  Note that, regardless of your selection here, the first time you run the export all active loyalty programs are included.

- Specify export filename - The setting of the Retail Insights Loyalty Program Data Sync Export Default Filename property is displayed and cannot be changed.

Loyalty Program Data Export File - BI/Analytics

The export file is pipe-delimited, and typically contains the following information:

- Loyalty Program Id
- Loyalty Program Name
- Points Name
- Points Currency Value
- Loyalty Program Active Flag
- Loyalty Program Start Date
- Loyalty Program End Date
- Loyalty Program Level Id
- Loyal Program Level Name
- Loyalty Program Level Active Flag
- Default Program Level flag
- Program Currency

The export file does not include a header row. Instead, there is a separate file with the same name as the loyalty program data export file, but with an extension of .ctx, that includes the titles of each column in the export file. For example, if the loyalty program data export file name is W_RTL_LYL_PROG_DS.dat, the file containing the header row names is W_RTL_LYL_PROG_DS.dat.ctx.

Loyalty Award Transaction Sync Export

This task has the following parameters:

- Batch Exporter Type - Defaults to BI/Analytics and cannot be changed.
- Export Type - Controls which records to include in the export file:
  - Export all active records - Include all award transactions for all active loyalty programs.
  - Export updated records only - Include award transactions only if they have occurred since the last export.

  Note that, regardless of your selection here, the first time you run the export all award transactions for all active loyalty programs are included.
- Specify export filename - The setting of the Retail Insights Loyalty Award Transaction Data Sync Export Default Filename property is displayed and cannot be changed.

Loyalty Award Transaction Data Export File - BI/Analytics

The export file is pipe-delimited, and typically contains the following information:

- Award Transaction ID- The unique numeric identifier of the transaction.
- Award Account ID - The unique numeric identifier of the award account.
- Award Program ID - The unique numeric identifier of the award program.

- Card Serial Number - The serial number for the account.
- Customer Number - The unique numeric identifier of the customer.
- Award Type - E-Award or Entitlement Coupon.
- Award Transaction Type code - IssueCoupon, IssueEntitlementCoupon, Redeem, AutomaticRedeem, TransferIn, TransferOut, VoidAwardTransaction, NotifyCouponExpire, ActivateAccount, DeactivateAccount, and AccountMerge.
- Coupon ID - The unique numeric identifier for the award coupon.
- Coupon Effective Date - The date when the coupon becomes effective.
- Coupon Expiry Date - The date when the coupon expires.
- Issue Amount - Amount awarded in award currency during a E-Award issue. Populated when the transaction type is IssueCoupon or IssuePromoAwardCoupon.
- Redeem Amount - Amount redeemed in award currency during an E- Award redemption. Populated when the transaction type is Redeem or AutomaticRedeem.
- Balance Amount - Balance of an E-Award coupon.
- Deal ID - Deal associated to the given Coupon for an entitlement deal award.Deal Name - The name of an entitlement deal.
- External Deal ID - Promote-side Deal ID that is used to trigger the deal at POS for an entitlement coupon. The external deal ID and the Deal ID can be the same.
- Max Redeem Count - The maximum redeemable count for the deal. Included only for an Entitlement Deal.
- Redeemed Count - The redeemed count for this specific entitlement coupon record. Included only for an Entitlement Deal.
- Redemption Balance - The total count eligible for redemption. Calculated by subtracting the Redeemed Count from the Max Redeem Count. Included only for an Entitlement Deal.
- Award Currency - The currency defined for the award program.
- Award Transaction Date - The date when the transaction took place.
- Coupon Fully Redeemed Flag - Flag indicating if the given coupon has been fully redeemed. For an E-Award, this is the Issue Amount = Redeem Amount. For an Entitlement Deal, this is the Max Redeem Count = Redeemed Count.
- Coupon Expiry Flag - Flag indicating if the Expiry Date for the coupon has passed.
- Transfer Out Amount - The amount transferred out to another account.
- Transfer In Amount - The amount transferred in from another account.

The export file does not include a header row. Instead, there is a separate file with the same name as the loyalty award transaction data file, but with an extension of .ctx, that includes the titles of each column in the export file. For example, if the loyalty award transaction data file name is W_RTL_LYL_AWD_DS.dat, the file containing the header row names is W_RTL_LYL_AWD_DS.dat.ctx.

Update Loyalty Program Level Customer Map Parameters

This task has no additional parameters.

Delete Customers

This Task has the following parameters:

- Number of Days - This Text Field defines the number of days after a Customer's Last Purchase Date on which a Customer is deleted.
- Based On - A field that describes what the Number of Days field is determined by.
- Report Only - This toggle indicates whether the Task only reports the number of Customers that would be deleted, or if the Customers are deleted.
  - On () - Only a count of the Customers are reported.
  - Off () - The Customers are deleted.

Delete Inactive Customers

This Task has the following parameters:

- Number of Days - This Text Field defines the number of days after a Customer's Last Update Date on which a Customer is deleted.
- Based On - A field that describes what the Number of Days field is determined by.
- Report Only - This toggle indicates whether the Task only reports the number of Customers that would be deleted, or if the Customers are deleted.
  - On - Only a count of the Customers are reported.
  - Off - The Customers are deleted.

Purged data includes:

- The customer ID is set to null in the following tables:
  - TRN_LINE_ITEM
  - TRN_LINE_ITEM_MODIFIER
  - TRN_TRANSACTION
  - AWD_ACCT_ACTIVITY
  - LYL_LOYALTY_ACCT_ACT
  - SVC_TENDER_ACCT_ACT
- Archived customer data is deleted from the following tables:
  - ARCH_CST_CUST_PHONE
  - ARCH_CST_ADDRESS
  - ARCH_CST_CUST_ATTRIBUTES
  - ARCH_CST_CUST_ALT_KEY
  - ARCH_TRN_CUST_HISTORY
  - ARCH_CST_DEPARTMENT_TOTALS
  - ARCH_CST_CUSTOMER
  - ARCH_CST_CUST_NOTES
  - ARCH_CST_PREFERENCE_CENTER

- ARCH_CST_CUST_SOCIAL_PROFILE
- ARCH_CST_CUST_SOCIAL_ACTIVITY
- ARCH_CST_CUST_FRANCHISEE_MAP
- ARCH_CMP_SOCIAL_RESULT_MAP

Also, any Item Registry that includes only the inactive Customer is deleted, regardless of whether the inactive Customer is the primary Customer for the Registry.

Oracle recommends scheduling this Task to run weekly.

Delete Inactive Customer Addresses

This Task has the following parameters. The deletion is always based on the setting of the Active flag. Customer addresses are flagged as inactive when you select the Delete option for the address.

- Report Only - This toggle indicates whether the Task only reports the number of Customer addresses that would be deleted, or if the Customer addresses will actually be deleted.
  - On - Only a count of the Customer addresses are reported. The listing displayed at the Job Details Window indicates the total number of inactive addresses that would be deleted for all Customers, and the total number of Customers that would have inactive addresses deleted. These numbers might be different, for example, if you deleted two addresses for the same Customer.
  - Off - The Customer addresses are deleted.The listing displayed at the Job Details Window indicates the total number of inactive addresses that were deleted for all Customers, and the total number of Customers that had inactive addresses deleted. These numbers might be different, for example, if you deleted two addresses for the same Customer.

Delete Inactive Customer Phone Numbers

This Task has the following parameters. The deletion is always based on the setting of the Active flag. Customer phone numbers are flagged as inactive when you select the Delete option for the phone number.

- Report Only - This toggle indicates whether the Task only reports the number of Customer phone numbers that are deleted, or if the Customer numbers are actually deleted.
  - On - Only provides a count of the Customer phone numbers that are reported as inactive. The count at the Job Details Window indicates the total number of inactive phone numbers that will be deleted for all Customers and the total number of Customers that will have inactive phone numbers deleted. These numbers might be different, for example, if you deleted two phone numbers for the same Customer.
  - Off - The Customer phone numbers are deleted. The listing displayed at the Job Details Window indicates the total number of inactive phone numbers that were deleted for all Customers, and the total number of Customers that had inactive phone numbers deleted. These numbers might be different, for example, if you deleted two phone numbers for the same Customer.

Delete Inactive Customer Email Addresses

This Task has the following parameters. The deletion is always based on the setting of the Active flag. Customer email addresses are flagged as inactive when you select the Delete option for the email address.

- Report Only - This toggle indicates whether the Task only reports the number of Customer email addresses that are deleted, or if the Customer email addresses are actually deleted.
  - On - Only provides a count of the Customer email addresses that are reported as inactive. The count at the Job Details Window indicates the total number of inactive emails that will be deleted for all Customers and the total number of Customers that will have inactive emails deleted. These numbers might be different, for example, if you deleted two phone numbers for the same Customer.
  - Off - The Customer email addresses are deleted. The listing displayed at the Job Details Window indicates the total number of inactive email addresses that were deleted for all Customers and the total number of Customers that had inactive email addresses deleted. These numbers might be different, for example, if you deleted two email addresses for the same Customer.

Delete Transaction History

This Task has the following parameters:

- Number of Days - This Text Field defines the number of days after a Transaction Business Date on which a Transaction is deleted.
- Based On - A field that describes what the Number of Days field is determined by.
- Report Only - This toggle indicates whether the Task only reports the number of Transactions that are to be deleted, or if the Transactions will be deleted.
  - On - Only a count of the Transactions are reported.
  - Off - The Transactions are deleted.

Delete Promotion

This Task has the following parameters:

- Number of Days - This Text Field defines the number of days after a Promotion's End Date on which a Promotion is deleted.
- Based On - A field that describes what the Number of Days field is determined by.
- Report Only - This toggle indicates whether the Task only reports the number of Promotions that would be deleted, or if the Promotions are deleted.
  - On - Only a count of the Promotions are reported.
  - Off - The Promotions are deleted.

Delete Merged/Archived Customers

This Task has the following parameters:

- Number of Days - This Text Field defines the number of days after a merged Customer record's Create Date on which the merged Customer records are deleted. Any Customer record that was merged and archived before that date is removed from the system
- Based On - A field that describes what the Number of Days field is determined by.
- Report Only - This toggle indicates whether the Task only reports the number of Customers that would be deleted, or if the Customers are deleted.
  - On - Only a count of the Customers are reported.
  - Off - The Customers are deleted.

Oracle recommends that you schedule this task to run every week.

Delete Loyalty Accounts and Activities

This Task has the following parameters:

- Number of Days - This Text Field defines the number of days after a Loyalty Account's Last Update Date on which a Loyalty Account and its activities are deleted.
- Based On - A field that describes what the Number of Days field is determined by.
- Report Only - This toggle indicates whether the Task only reports the number of Loyalty Accounts that would be deleted, or if the Loyalty Accounts are deleted.
  - On - Only a count of the Loyalty Accounts are reported.
  - Off - The Loyalty Accounts and activities are deleted.

Delete Loyalty Inquiry Activities

This Task has the following parameters:

- Number of Days - This Text Field defines the number of days after a Loyalty Inquiry's Last Activity Date on which a Loyalty Inquiry is deleted.
- Based On - A field that describes what the Number of Days field is determined by.
- Report Only - This toggle indicates whether the Task only reports the number of Loyalty Inquiries that would be deleted, or if the Loyalty Inquiries are deleted.
  - On - Only a count of the Loyalty Inquiries are reported.
  - Off - The Loyalty Inquiries are deleted.

Delete Loyalty Program Summary

This Task has the following parameters:

- Number of Months - Set the number of months after which data from the Loyalty Summary Aggregate tables will be deleted based on the Year and Month fields. If 0 is entered, all data will be deleted. If 1 is entered, only one month (the latest) will be kept and all previous data deleted. If 2 is entered, only the latest and previous month will remain and so on.
- Report Only -
  - On - The data will not be deleted, a count of the rows to delete from each table will be shown in the job processing output when the job is complete.
  - Off - The data will be deleted and a summary will be shown in the job processing output.

Delete Segments

This Task has the following parameters:

- Number of Days - This Text Field defines the number of days after a Segment's Last Run Date on which a Segment is deleted.
- Based On - A field that describes what the Number of Days field is determined by.

- Report Only - This toggle indicates whether the Task only reports the number of Segments that would be deleted, or if the Segments are deleted.
  - On - Only a count of the Segments are reported.
  - Off - The Segments are deleted.

Delete Segment History

This Task has the following parameters:

- Number of Days - This Text Field defines the number of days after a Segment's Last Run Date on which the History for the Segment is deleted.
- Based On - A field that describes what the Number of Days field is determined by.
- Report Only - This toggle indicates whether the Task only reports the number of Segment Histories that would be deleted, or if the Segment Histories are deleted.
  - On - Only a count of the Segment Histories are reported.
  - Off - The Segment Histories are deleted.

Delete Job History

This Task has the following parameters:

- Number of Days - This Text Field defines the number of days after a Job's End Date on which the History for the Job is deleted.
- Based On - A field that describes what the Number of Days field is determined by.
- Report Only - This toggle indicates whether the Task only reports the number of Job Histories that would be deleted, or if the Job Histories are deleted.
  - On - Only a count of the Job Histories are reported.
  - Off - The Job Histories are deleted.

Delete Export Files

This Task has the following parameter:

- Number of Days - This Text Field defines the number of days to retain files in export directories before they are eligible to be deleted. The Task uses the date when a file was most recently modified to determine whether it is eligible for deletion.

Once an export file has been deleted, the Job Details Window for the export job displays a message: File no longer available.

Oracle recommends scheduling this Task to run weekly.

The following configuration properties define the export directories where files are created for export that are subject to deletion through this task.

- Account Batch Exporter Export Directory
- Award Export Directory
- Card Export Directory
- Card Series Export Directory
- Customer Batch Exporter Export Directory

- Customer Segment Export Directory
- Directory For Promotion Batch Export Files
- Directory For Segment Batch Export Files
- Location Specific Transform Export Directory
- Loyalty Export Directory
- Promote Transforms Export Directory
- Promotion Transforms Export Directory
- Promotion Export Directory
- Promotion Transforms Export Directory
- Retail Insights Batch Exporter Export Directory
- Tender Activity Report Export Directory

See the *Oracle Retail Customer Engagement Implementation Guide* for information on setting up configuration properties.

Delete Import Files

This Task has the following parameter:

- Number of Days - This Text Field defines the number of days to retain files in import directories before they are eligible to be deleted. The Task uses the date when a file was most recently modified to determine whether it is eligible for deletion.

Oracle recommends scheduling this Task to run weekly.

The following configuration properties define the import directories where files are deleted.

- Card Series Import Upload Directory
- Batch File Input Directory

See the *Oracle Retail Customer Engagement Implementation Guide* for information on setting up configuration properties.

Delete Gift Registries

This task has the following parameters:

- Number of Days - This Text Field defines the number of days after a Gift Registry's Expiration Date on which the Gift Registry is deleted.
- Based On - A field that describes what the Number of Days field is determined by.
- Report Only - This toggle indicates whether the Task only reports the number of Gift Registries that would be deleted, or if the Gift Registries are deleted.
  - On - Only a count of the Gift Registries are reported.
  - Off - The Gift Registries are deleted.

Delete Inactive Item Registries

This task has the following parameters:

- Number of Days - This Text Field defines the number of days after an Inactive Wish List's or Gift Registry's Last Update Date on which the Wish List is deleted.
- Based On - A field that describes what the Number of Days field is determined by.
- Report Only - This toggle indicates whether the Task only reports the number of Gift Registries that would be deleted, or if the Wish Lists are deleted.
  - On - Only a count of the Wish Lists are reported.
  - Off - The Wish Lists are deleted.

Delete Inactive Segment

This task has no additional parameters.

Delete Social Activity

This task has the following parameters:

- Search Strategy - This Selection Menu determines the social network for which the Social Activity is being deleted.
- Number of Days - This Text Field defines the number of days after a Social Activity item's Last Activity Date on which the item is deleted.
- Based On - A field that describes what the Number of Days field is determined by.
- Report Only - This toggle indicates whether the Task only reports the number of Social Activity items that would be deleted, or if the Social Activity is deleted.
  - On - Only a count of the Social Activity items that are reported.
  - Off - The Social Activity is deleted.

Delete Tasks

This task has the following parameters:

- Task Status - This Selection Menu includes the following options.
  - All (Default)
  - Open
  - In Progress
  - Cancelled
  - Closed
- Number of Days - Set the number of days after a Task's Update/Create Date on which the Task is deleted.
- Based On - A field that describes what the Number of Days field is determined by.
- Report Only - This toggle indicates whether the Task only reports the tasks that would be deleted, or if the tasks are deleted.
  - toggle Right - Only a count of the tasks that are reported.
  - toggle Left - The Tasks that are deleted.

Delete Award Inquiry Activities

This task has the following parameters:

- Number of Days - This Text Field defines the number of days after a Award Inquiry's Last Activity Date on which a Award Inquiry is deleted.
- Based On - A field that describes what the Number of Days field is determined by.
- Report Only - This toggle indicates whether the Task only reports the number of Award Inquiries that would be deleted, or if the Award Inquiries are deleted.
  - On - Only a count of the Award Inquiries are reported.
  - Off - The Award Inquiries are deleted.

Delete Web Service Tracking

This task has the following parameters:

- Number of Days - This Text Field defines the number of days after which tracked Web Service activity is deleted, based on the date when the record in the database was most recently updated.
- Based On - A field that describes what the Number of Days field is determined by.
- Report Only - This toggle indicates whether the Task only reports the number of Web Service Tracking records that would be deleted, or if the Web Service Tracking records would be deleted.
  - On - Only a count of the consolidated daily, weekly, and monthly Web Service Tracking records are reported.
  - Off - The consolidated Web Service Tracking records are deleted.

Delete Batch Import History

This task has the following parameters:

- Number of Days - This Text Field defines the number of days after which batch import history is deleted, based on the END_DATE in the XMLAPI_PROCESSED_RECORD table.
- Based On - A field that describes what the Number of Days field is determined by.
- Report Only - This toggle indicates whether the Task only reports the number of Batch Import History records that would be deleted, or if the Batch Import History records would actually be deleted.
  - On - Only a count of the Batch Import History records are reported.
  - Off - The Batch Import History records are deleted.

Delete Batch Process Tracking

This task has the following parameters:

- Number of Days - This Text Field defines the number of months after which tracked Batch Process activity is deleted, based on the date when processing ended. If this field is set to 0, all existing consolidated daily, weekly, and monthly Batch Processing data is eligible for deletion.

- Based On - A field that describes what the Number of Days field is determined by.
- Report Only - This toggle indicates whether the Task only reports the number of Batch Process Tracking records that would be deleted, or if the Batch Process Tracking records would be deleted.
  - On - Only a count of the consolidated daily, weekly, and monthly Batch Process Tracking records are reported.
  - Off - The consolidated Batch Process Tracking records are deleted.

Delete Stored Files

Number of Days - This Text Field defines the number of days after which transfer file data currently stored in the database is deleted, based on each file's Create Date.

Based On - A field that describes what the Number of Days field is determined by.

Report Only - This toggle indicates whether the Task only reports the number of stored file records that would be deleted, or if the stored file records would be deleted.

- ON - Only a count of the stored transfer files records are reported.
- OFF - The stored transfer file records are deleted.

Data stored in the database on failed transfer files is deleted automatically based on the Delete Failed Transfer in X Days system configuration property.

Aggregate Loyalty Facts

This task has the following parameters:

- Number of prior years to begin aggregation of loyalty data - This Text Field determines the number of years prior to the current date that is included in the aggregation.
- Maximum number of months to collect data - This Text Field defines the number of months for which data is aggregated.

  If this field is left blank [default], the system will aggregate all the data included in the indicated number of years.
- Reset Prior Run Data - This toggle indicates whether the task will delete the previously aggregated loyalty information and create an entirely new summary, or if the summary information from previous aggregations are kept.
  - On - The task will remove all of the currently existing summary information and create an entirely new summary.
  - Off - The task will keep the previously collected summary information.

Aggregate Tender Facts

This task has no additional parameters.

Aggregate Award Program Summary

This task has no additional parameters.

Aggregate Loyalty Program Summary

This task has no additional parameters.

Aggregate Promotion Scorecard Summary

This task has no additional parameters.

Aggregate Tender Program Summary

This task has no additional parameters.

Dynamic and Recurring Promotions

This task has no additional parameters.

This job should be scheduled for the very early morning, before users generate Promotions. This allows the Job to run before any Dynamic and Recurring Promotions are generated.

If a Dynamic and Recurring Promotion was generated earlier in the day, do not run this job on the same day.

Do not run this job more than once per day.

Promotion Response Data Import

This task has no additional parameters.

This task processes the following import files to create Customer Notes recording each of the specific customer events. These files are typically submitted by a marketing system such as Responsys.

SENT_EMAILS Promotion Import File

This import file includes the following information:

- Campaign ID.
- Promotion ID.
- Event Type of 1 (sent email).
- Customer ID.
- Event Captured Date.

Each processed record in the import file creates a Customer Note:

- Type - EMAIL_SENT.
- User - OMC.
- Location - The organization's default location.
- Note contents:
  - Campaign ID.
  - Promotion ID.

  - Event Type ID.

CLICK_EMAILS Promotion Import File

This import file includes the following information:

- Event Type of 5 (click email).
- Customer ID.
- Event Captured Date.
- Campaign ID.
- Promotion ID.
- Offer Name (the name from the marketing system, such as Responsys).
- Offer Category (the category from the marketing system, such as Responsys).
- Offer URL.

Each processed record in the import file creates a Customer Note:

- Type - EMAIL_CLICKED.
- User - OMC.
- Location - The organization's default location.
- Note contents:
  - Campaign ID.
  - Promotion ID.
  - Event Type ID.
  - Offer Name.
  - Offer Number.
  - Offer Category.
  - Offer URL.

OPEN_EMAILS Promotion Import File

This import file includes the following information:

- Event Type of 4 (open email).
- Account ID.
- List ID (the list ID from the marketing system, such as Responsys).
- RIID (ID code from the marketing system, such as Responsys).Customer ID.
- Event Captured Date.
- Campaign ID.
- Promotion ID.

Each processed record in the import file creates a Customer Note:

- Type - EMAIL_OPENED
- User - OMC.

- Location - The organization's default location.
- Note contents:
  - Campaign ID.
  - Promotion ID.
  - Event Type ID.

FAIL_EMAILS Promotion Import File

This import file includes the following information:

- Customer ID.
- Event Type of 8 (failed email).
- Event Captured Date.
- Campaign ID.
- Promotion ID.

Each processed record in the import file creates a Customer Note:

- Type - EMAIL_FAILED
- User - OMC.
- Location - The organization's default location.
- Note contents:
  - Campaign ID.
  - Promotion ID.
  - Event Type ID.

Social Network Listener

This task has the following parameter:

- Social Network - This Selection Menu determines the social network to search for social activity matching the entered criteria.

Social Network Update

This task has the following parameters:

- Search Strategy - This Selection Menu determines the social network for which the Social Activity is being deleted.
- Number of Days - This Text Field defines the number of days in the past for which to search for updates.
- Based On - A field that describes what the Number of Days field is determined by.
- Report Only - This toggle indicates whether the Task only reports the number of updates available, or if the Social Profiles are updated.
  - On - Only a count of the updates that are reported.
  - Off - Social Profiles are updated.

Task Generator

This task has the following parameters:

- Select Segment For Task Generator - This Selection Menu determines the Segment for which tasks are generated.
- Task Type - This field cannot be edited.
- Subject - [required] This Text Field defines the subject line for the tasks.
- End after X days - This Text Field defines the number of days from the present day that the task will end.
- Skip if issued within X days - This Text Field defines a number of days before the present date in which, if the customer had a task created within those days, the job will not generate a task for that customer.
- Status - This field cannot be edited.
- Priority - This Selection Menu defines the priority for the created tasks.
- Associate Assignment Detail - These Radio Buttons determine the associate role for the associate who is assigned each task.
  - Assign to Primary - Assign each task to the customer's primary associate.
  - Assign to Role - Assign each task to the associate assigned to a specified role.
    - If Assign to Role is selected, a Selection Menu is enabled for determining the associate role to use when assigning the tasks.
  - Note Type - This Selection Menu determines the type of note (if any) to add to each task.
  - Note - This Text Area Field is used to enter the text of a note (if any) to add to each task.

Batch Import Review

This task has the following parameters:

- Select processed file result type: - These options determine the result types to include in the generated email:
  - All - Include all results in the generated email.
  - Error/Warning [default] - Include only errors or warnings in the generated email.

    See the *Oracle Retail Customer Engagement Batch Processing and Web Services Guide* for more information.
- List of Users - Select one or more Users to receive the email from the Selected Users Selection Search window.
  1. Click the Selected Users **Plus** icon to open a search window and search for the User to receive the email.
  2. Click Select. The User is added to the Selected Users List.
  3. Repeat step 2 for each User to be added to the Users list.
  4. To remove a User from the Users list, click the **X** icon. The User is removed from the Users list.

- List of Email Addresses - Enter one or more emails to add to the Notification Email List.
  1. Enter the email address in the Notify Email Address field.
  2. Click the **Plus** icon. The email address is added to the Notification Email List.

     > **Note:**
     >
     > Validation is performed on the email address.

  3. Repeat steps 1-2 for each email address to be added to the Notification Email List.
  4. To remove an email address from the Notification Email List, click the **X** icon. The email address is removed from the Notification Email List.

ODCS Sync

This task generates requests to the Omnichannel Cloud Data Service (OCDS) for updates on item and merchandise hierarchy data as well as location and franchise data. The three toggles are set to OFF by default and require SystemConfig or SystemAdmin authority, and have the following parameters:

- Item and Merchandise Hierarchy - Select this option to request item and merchandise hierarchy data from the Omnichannel Cloud Data Service, including:
  - Merchandise Hierarchy
  - Item Header
  - Item Image
  - Item Price
- Location and Franchise - Select this option to request location and franchise data from the Omnichannel Cloud Data Service, including:
  - Store Location
  - Organizational Hierarchy/Franchise
- Reset Last Run Date - Select this option to retrieve all data, regardless of date created or updated; otherwise, leave this option OFF to request only data that has been created or updated since the last time you ran the OCDS data sync.

See Bulk Imports through Oracle Cloud Data Service (OCDS) in the *Batch Processing and Web Services Guide* for more information on the integration and the data received.

Data Sync

This task has the following parameters:

- Click **Send Sample Message** to test the connection to a third party application. A confirmation appears indicating the message was sent successfully. If the connection is not working contact your application administrator.
- Enter the **Client ID**.
- Enter the **Secret** credential.

> **Note:**
>
> The Client ID and Secret are provided by the third party application that integrates with Customer Engagement.

- Click **Save**.

ORPE Sync

This task has no additional parameters.

This task cannot have any other tasks running with it. The ORPE Sync job is meant to only be run once and therefore can only be scheduled Once, Immediately or Once, Later. The size of the batch can be configured through System Configuration Promote Batch Size. See the *Oracle Retail Customer Engagement Implementation Guide* for more information.

The Process Queue can be used to view the run history for the ORPE task and will provide a breakdown of the number of records retrieved/processed for each service.

13 Reports

Oracle Retail Customer Engagement Cloud Services provides a set of pre-defined reports that cover all aspects of the application. The results can be modified through sorting and filtering.

Available reports are based on the organization when logged into system.

To access the Reports panel, click the **Reports** icon from the main toolbar.

About this Chapter

This chapter contains the following information:

- Report Categories and Report Descriptions
  - Account Management
  - Award Management
  - Campaign Management
  - Card Management
  - Customer Management
  - Item Management
  - Location Operations
  - Loyalty Management
  - Segment Management
  - Tender Account Management
  - Registry Management
  - Task Management
- Displaying Reports
  - Running Reports
  - BI Publisher Toolbar
  - View Report Options
  - BI Publisher Actions
- Report Generation Options and Contents

Report Categories and Report Descriptions

Almost all reports require additional configuration information that limit the results returned. Most fields allow the user to create Lists of multiple items to be included on the report.

> **Note:**
>
> In most cases, if no information is entered for a configuration field, all results for that field are included on the report (up to the defined Limit Records setting).

The reports available for generation are listed in the following sections.

Account Management

Account Activity Summary - This report presents transaction count and value summary information about the program activities, segregated by activity typecode, user, and reason code. See Account Activity Summary Report for more information.

Award Management

- Award Account Activity Details - This report presents detailed information about activities performed on one or more given Award Accounts. See Award Account Activity Details Report for more information.
- Award Account Activity Errors - This report presents detailed information about transaction errors associated with Award Accounts. See Award Account Activity Errors Report for more information.
- Award Account Activity Trend - This report presents daily counts of Award Transactions, organized by Activity type, within a Program, and includes charts illustrating award account activity. See Award Account Activity Trend Report for more information.
- Award Account Balance - This report presents the Account balance available at run time for each Account. See Award Account Balance Report for more information.
- Award Account Error Trend - This report presents information about the number of times transaction errors occurred, by date, for each Program, and includes a chart illustrating error incidence. See Award Account Error Trend Report for more information.
- Award Account Last Use - This report presents counts of Accounts within an Award Program, grouped by the number of days between last use date and system date at run time. See Award Account Last Use Report for more information.
- Award Activity By Location - This report presents Award activity within a Program, by Location, for a selected date range. See Award Activity by Location Report for more information.
- Award Activity By Program - This report presents a summary of Account activities, listed by type, for each Program. See Award Activity by Program Report for more information.
- Award Entitlement Expiration - This report presents a listing of the expiration dates of issued Entitlement Coupons, providing information on how many are due to expire or have expired. See Award Entitlement Expiration Report for more information.
- Award Entitlement Redemption - This report presents a count of redeemed Entitlement Coupons for each Entitlement Offer, and includes charts illustrating entitlement redemption activity. See Award Entitlement Redemption (Trend) Report for more information.
- Award Entitlement Summary - This report displays the number of Issued Coupons for each Offer within an Entitlement program. See Award Entitlement Summary Report for more information.

- Award Program Balance Summary - This report presents summary statistics about current Account balances within each Award Program. See Award Program Balance Summary Reportfor more information.
- Award Program Definitions - This report presents details about each Award Program definition. See Award Program Definition Report for more information.
- Award Redemption Rate - This report presents information about the number of Award certificates issued & redeemed for each Card Prefix and Card Series by Program. See Award Redemption Rate Report for more information.

Campaign Management

- Promotion Response By Category - This report presents the event response, by Product Hierarchy, for the selected Promotion events, including items purchased. See Promotion Response by Category Report for more information.
- Promotion Response By Date - This report summarizes the value of the response, by business date, to the selected Promotion events. See Promotion Response by Date Report for more information.
- Promotion Response By Deal - This report summarizes the value of the response, by Deal, to the selected Promotion events. See Promotion Response by Deal Report for more information.
- Promotion Response By Location - This report summarizes the value of the response, by Location, to the selected Promotion events. See Promotion Response by Location Report for more information.
- Promotion Response By Target - This report presents response data, by Segment Target, for selected Promotion events. See Promotion Response by Target Report for more information.
- Promotion Response Detail - This report displays information about the Transactions created in response to each Promotion. See Promotion Response Detail Report for more information.
- Promotion Target Detail - This report displays Customer information for the segment targeted in each Promotion. See Promotion Target Details Report for more information.
- Promotion Target List - This report presents information about the Segment Targets associated with each Promotion within a Campaign. See Promotion Target List Report for more information.
- Promotion Target Segment List - This report displays a list of each Target Segment associated with each Promotion within a Campaign. See Promotion Target List Report for more information.

Card Management

- Card Batch Activation Rate - This report displays the activation rate for each Batch within each Card Series on the Card Prefix. See Card Batch Activation Rate Report for more information.
- Card Detail - This report presents detailed information about individual Cards defined in the system. See Card Detail Report for more information.
- Card Series Activation Rate - This report presents the activation rate for each Card Series created for each Card Type. See Card Series Activation Rate Report for more information.

Customer Management

- Address Summary - This report presents a count of Customers by address type, grouped by whether they are primary or valid. See Address Summary Report for more information.
- Birthday Summary - This report presents Customer counts by birth month. See Birthday Summary Report for more information.
- Customer Alt Key Summary - This report presents counts of the number of Customers by Alternate Key Type. See Customer Alt Key Summary Report for more information.
- Customer Assoc Assign By Assoc Role - This report displays contact information for Customers associated to a particular Associate Role. See Customer Associate Assignment by Associate and Role Report for more information.
- Customer Contact Email List - This report presents a listing of Customer names, addresses, and primary emails by Signup Location. See Customer Contact Email List Report for more information.
- Customer Contact Phone List - This report presents a listing of Customer names, addresses, and phone numbers by Signup Location. See Customer Contact Phone List Report for more information.
- Customer Purch By Dept By Year - This report presents a summary of Customer purchase activity by Department and year. See Customer Purchase by Department by Year Report for more information.
- Customer Status Summary - This report presents the number of Customer records grouped by Identified/Unidentified (Anonymous Flag) within Active/Inactive (Status Flag). See Customer Status Summary Report for more information.
- Gender Summary - This report presents the count of Customers grouped by gender. See Gender Summary Report for more information.
- Location Capture Rate - This report presents a count of Customers, by Anonymous Flag, for each signup Location. See Location (Store) Capture Rate Report for more information.
- Postal Code Summary - This report presents a count of Customers by Postal Code, filtered on only primary, active, home addresses. See Postal Code Summary Report for more information.
- Social Network Summary - This report displays a count of Customers by Social Network, grouped by the Customer's Home Store. See Social Network Summary Report for more information.
- State Summary - This report presents a count of active primary address records grouped by state. See State Summary Report for more information.
- Summary Report - This report presents totals and percentages of types of addresses, email addresses, and phone numbers for Customers who signed up within a specified date range. See Summary Detail Report for more information.

Item Management

- Item Attribute Summary - This report provides a count of Items that are associated with each given Item Attribute and Attribute value. See Item Attribute Summary Report for more information.

Location Operations

- Capture Quality Report - This report presents the percentage of validated Customer data, organized by Operator ID, within each Location. See Capture Quality Summary Report for more information.
- Customers by Home Location - This report presents a count of Customers for each Home Location. See Customer by Home Location Report for more information.
- Shoppers By Location - This report presents Customer count and purchase statistics for each Location. See Shoppers by Location Report for more information.
- Sign Up Location by Postal Code - This report presents the number of Customers, by Zip Code (or Postal Code) and on a given date, who signed up at the Location. See Signup Location (Store) by Postal Code Report for more information.
- Sign Up Location By State - This report presents the number of Customers by state, grouped by signup Location. See Signup Location by State Report for more information.
- Signup Location - This report presents the number of Customers by signup Location. See Signup Location Report for more information.
- Signup Location Daily Trend - This report presents Customer counts by signup date and signup Location, and includes a chart illustrating Customer signups by date. See Signup Location Daily Trend Report for more information.

Loyalty Management

- Loyalty Account Detail - This report presents details of the activities performed on each Loyalty Account. See Loyalty Account Detail Report for more information.
- Loyalty Acct Activity Errors - This report presents details of errors for Loyalty Accounts by Program ID. See Loyalty Account Activity Errors Report for more information.
- Loyalty Acct Level Summary - This report presents account level summaries for Loyalty accounts by Program ID. See Loyalty Account Level Summary Report for more information.
- Loyalty Activity Type Summary - This report presents summary information on accounts and Loyalty activity types associated with Program Levels on Loyalty Programs. See Loyalty Activity Type Summary Report for more information.
- Loyalty Activity Type Trend - This report presents summary information on Accounts by Activity Type by business date, organized by Loyalty Program Level and includes charts summarizing Loyalty activity. See Loyalty Activity Type Trend Report for more information.
- Loyalty Issue Rule Impact - This report displays transaction level counts of merchandise associated with purchases against a Loyalty Issue Rule. See Loyalty Issue Rule Impact Report for more information.
- Loyalty Rules Results Summary - This reports displays summary account information by Activity Type for each Loyalty Rule. It is organized by Program levels within the Loyalty Programs. See Loyalty Rules Results Summary Report for more information.
- Loyalty Rules Results Trend - This report presents summary information on accounts by Activity Type by Activity Date for each Loyalty Rule. It is organized by Loyalty Program Level for each Loyalty Program and also includes summary level charts. See Loyalty Rules Results Trend Report for more information.

- Loyalty Accounts - Balance Summary - This report presents summary information about the Loyalty Account balances, by Program Level, within each Program. See Loyalty Account Balance Summary Report for more information.
- Lyl Accounts - Last Use - This report presents Loyalty Account summary information within a Loyalty Program Level, grouped by the number of months since last use date and system date. See Loyalty Account Last Use Summary Report for more information.
- Lyl Accounts - Lifecycle - This report presents Loyalty Account summary information within a Loyalty Program Level, grouped by the number of months the accounts have been in use. See Loyalty Account Life Cycle Summary Report for more information.
- Lyl Acct Act Summary - Award - This report presents the earned points from Award rules, by Loyalty Account, within a given period of time. See Loyalty Account Activity Summary Award Report for more information.
- Lyl Acct Act Summary - Issue - This report presents the earned points from Issue rules, by Loyalty Account, within a given period of time. See Loyalty Account Activity Summary Issue Report for more information.
- Lyl Program Level Summary - This report presents the current balance statistics for Program Levels within Programs. See Loyalty Program Level Summary Report for more information.

Segment Management

- N-Tile / Range Strata Summary - This report presents details on Customer Segments broken out by strata. See N-Tile / Range Strata Report for more information.
- Segment By Home Location - This report presents a count of Customers, by Home Location, for Customer Segments. See Segment by Home Location Report for more information.
- Segment By State - This report presents a count of Customers, by State, for Customer Segment. See Segment by State Report for more information.
- Segment Count List - This report presents the details of each Segment run within a specified time period. See Segment Count List Report for more information.
- Segment Customer Master - This report presents a listing of information about the Customers in each Segment. See Segment Customer Master Reportfor more information.
- Segment Purchase Profile Report - This report presents counts, by Segment, of individual Items purchased. See Segment Purchase Profile Report for more information.
- Segment Trend Analysis - This report presents trend totals for Segments broken out by Run ID, and includes charts illustrating trend totals for Customer Segments. See Segment Trend Analysis Report for more information.

Tender Account Management

- Tender Account Activity Summary - This report displays tender summary information by Activity Type, by Program. See Tender (Account) Activity Summary Report for more information.
- Tender Activity Summary - This report is the same as the Tender (Account) Activity Summary Report.
- Tender Activity Summary By Batch - This report displays tender summary information organized by Card Prefix, Series, and Batch, for Activity Types, by Program. See Tender Activity Summary by Batch Report for more information.

- Tender Activity Type Trend - This report displays tender summary information organized by Card Prefix, Series, and Batch, for Activity Types, by Program, and includes charts illustrating Tender Type activity. See Tender Activity Type Trend Report for more information.

Registry Management

- Registry Detail - This report presents detailed information for Gift Registries or Wish Lists. See Registry Detail Report for more information.

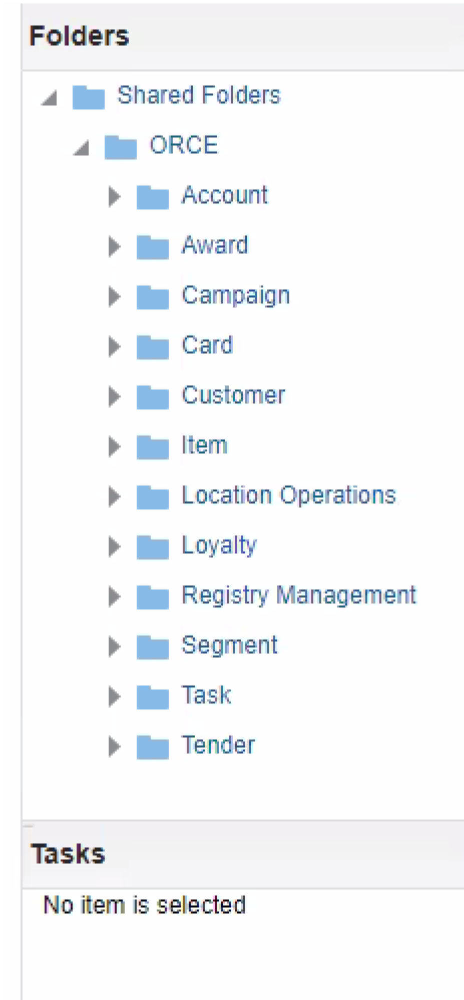
Task Management

- Associate Task Detail - This report presents details on customer targeted tasks, by the associate assigned to them. See Associate Task Details Report for more information.
- Associate Task Summary - This report presents a summary of the types of Tasks assigned to each Associate, and their current statuses. See Associate Task Summary Report for more information.
- Task Summary - This report presents a summary of types of Tasks by their current statuses. See Task Status Summary Report for more information.

Displaying Reports

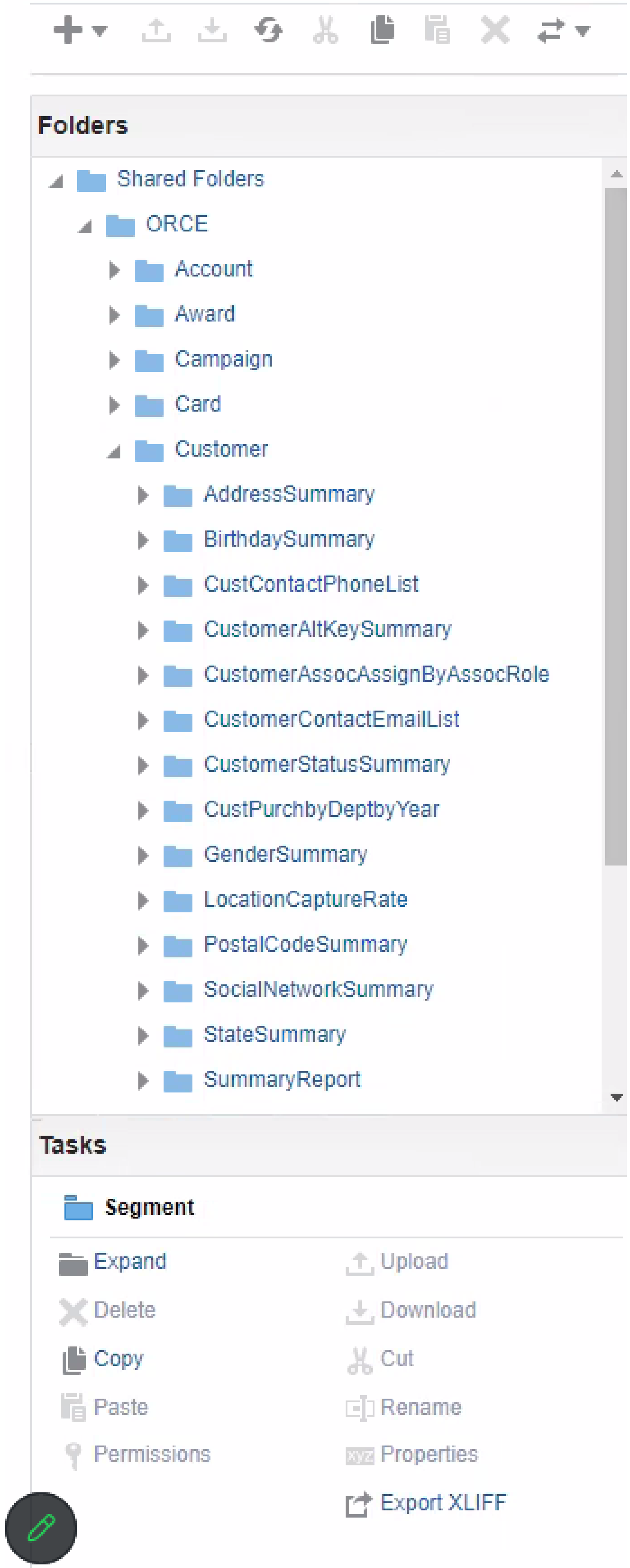
To access the Reports panel, click the **Reports** icon from the main toolbar. This displays the Reports panel, which lists all report categories and provides links to report lists and reports:

Figure 13-1 Reports Panel



Click the arrow next to a report category name to expand the report list:

Figure 13-2 Report List



Click the back arrow next to the report category name to return the Reports panel.

To search for a report:

1. Start typing e report name in the **Search for a report** prompt. As you type, a list of reports that match the text is displayed in a list.
2. Select the report that you want from the list.

   This displays the Report Criteria window. See Running Reports for more information.

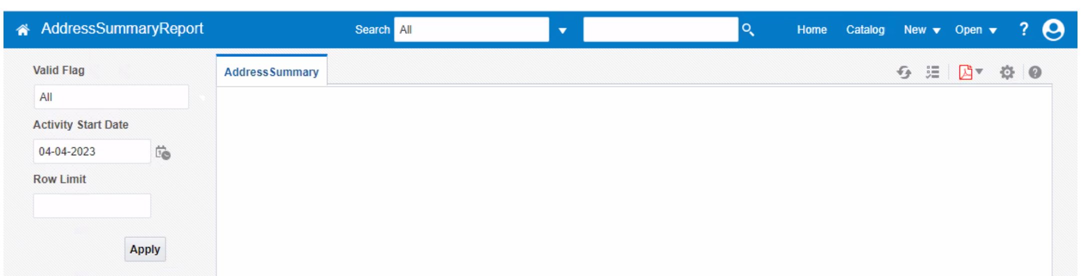
Running Reports

These reports are available using Oracle BI Publisher, accessed from the Customer Engagement main task bar under Reports, or by clicking the Reports icon, based on a user's privileges. To run a report:

> **Note:**
>
> Accessing the BI Publisher for the first time requires a login and password. Successive logins are automatic.

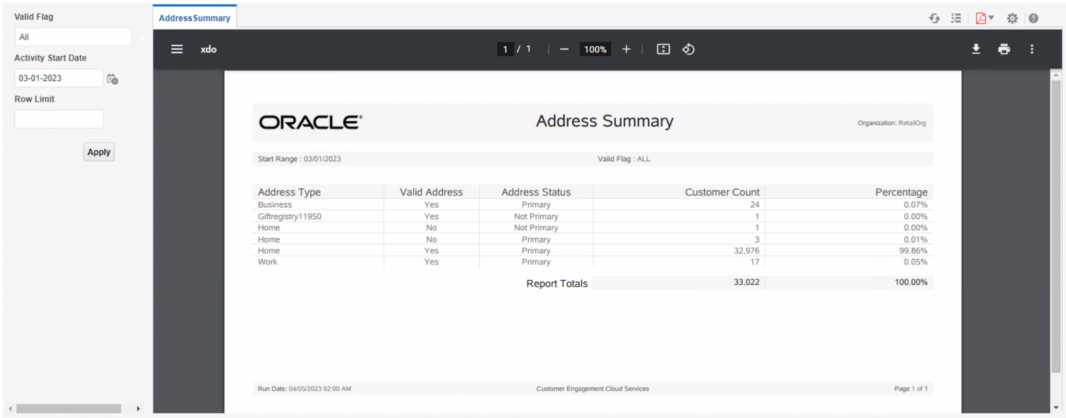
1. Click the **Reports** icon. This displays the Reports panel.
2. Expand the category of the report you want to run.
3. Select the report that you want to run from the list, or search for the report in the search prompt and select the report from the search list. Either action displays a Figure 13-3:

Figure 13-3 Report Criteria Entry window



4. Enter the criteria for the report In the Parameters fields.
5. Click **Apply.** This runs the report. A progress indicator is displayed while the results are retrieved. The report contents are displayed when the query is finished.

Figure 13-4 Report Content



The Report entry and display window has these main components:

- Selection Criteria - The selection criteria for the displayed Report.
- Report Contents - The contents of the generated Report.
- BI Publisher Options - The options available through BI Publisher to refresh, show or hide selection criteria, export the report to different formats, schedule, review job schedules, or share the report. Use Help to open a Help window. See BI Publisher Toolbar for more information.
- PDF Options - The options available through the PDF viewer to search, zoom in or out, print, download, rotate, or view document properties. See the documentation for your PDF viewer for more information.

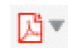
BI Publisher Toolbar

Table 13-1 lists the icons for the BI Publisher Toolbar.

Table 13-1 BI Publisher Toolbar Icons

Name	Description	Icon
Refresh	Refresh the data on the displayed Report.	
Parameters	Show or hide the selection criteria for the Report.	

Table 13-1 (Cont.) BI Publisher Toolbar Icons

Name	Description	Icon
View Report	Open the View Report Options list to select an output format for the Report. See View Report Options for more information.	
Actions	Select from sending, scheduling, exporting, and job options. See BI Publisher Actions.	
Help	Launches the BI Publisher online help.	

View Report Options

The View Report Options list includes the formats available for viewing or saving a Report.

Available options are:

- **HTML** - Display the Report in HTML format.
- **PDF [Default]** - Display the Report in PDF format.
- **RTF** - Display the Report in Rich Text Format.
- **Excel** - Display the Report in spreadsheet format (.xlsx).
- **PowerPoint** - Display the Report in presentation format (.pptx)

BI Publisher Actions

The BI Publisher Actions list includes the available sharing, scheduling, and publishing options.

Available actions are:

- **Export -** Opens the View Report Options list.
- **Send** - Enter selection criteria and send the Report for immediate delivery to an email address, printer, or other destination.
- **Schedule** - Schedule generation and distribution of the Report.
- **Jobs** - View and manage scheduled jobs for the Report.
- **Job History** - View and manage completed and running Report jobs.
- **Republish from History** - Select a previously scheduled, completed Report generation for viewing.
- **Share Report Link** - Generate a link to the currently displayed Report. See the BI Publisher online help for more information on these options.

Report Generation Options and Contents

The generation options and fields included on each report are described in the following sections.

- Account Management Reports
- Award Management Reports
- Campaign Management Reports
- Card Management Reports
- Customer Management Reports
- Item Management Reports
- Location Operations Reports
- Loyalty Management Reports
- N-Tile / Range Strata Report
- Segment by Home Location Report
- Segment by State Report
- Segment Count List Report
- Segment Customer Master Report
- Segment Purchase Profile Report
- Segment Trend Analysis Report
- Tender (Account) Activity Summary Report
- Tender Activity Summary by Batch Report
- Tender Activity Type Trend Report
- Registry Detail Report
- Associate Task Details Report
- Associate Task Summary Report
- Task Status Summary Report

Account Management Reports

The Account Management Reports include:

- Account Activity Summary Report

Account Activity Summary Report

This report presents transaction count and value summary information about the program activities, segregated by activity typecode, user, and reason code.

Selection Criteria

- **Program ID / Name -** The ID and Name identifying a Program for a Card Definition. All Programs are selected by default. Optionally, select Search to work with the list of eligible

Programs, search based on Program Name, or remove Programs from the list selected for the report.

- **Activity Time Period** - Optionally, select a time period to include activities that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

> **Note:**
>
> If you select an Activity Time Period, then the Activity Start Date and Activity End Date criteria are ignored.

- **Activity Start Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **Activity End Date** - The last date to include on the report. Defaults to the current date (today).
- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of individual Activity Typecodes with unique user IDs and reason codes for the entire report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.
- **Program ID** - The program IDs selected when generating the report, or set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Account Type Code** - AWARD, LOYALTY, or TENDER.
- **Program ID** - The ID and Name identifying a Program for a Card Definition.
- **Activity Typecode** - Describes the type of activity that took place for the Program during the date range. Possible types include:

  - Activate Account
  - Activate Card
  - Deactivate
  - Expire Coupon
  - Inquiry
  - Issue Award
  - Issue Coupon
  - Issue Entitlement Coupon
  - Issue Points
  - Issue Promo Award Coupon
  - Post Authorization
  - Pre Authorization
  - Redeem
  - Redemption
  - Release Authorization
  - Reload
  - Reset Expiration Date
  - Return
  - Void Transaction Unblock
- **Create User -** The ID of the user who performed the activity. May also be set to SYSTEM or POS. Set to N/A if no user ID is specified.
- **Reason Code -** The reason code passed for the activity. Set to N/A if no reason code is specified. If the same activity typecode occurs for multiple activities for the same Program, user ID, and date range, but with different reason codes, each reason code is listed separately on the report.
- **Total Trans Count -** The total number of transactions for the particular activity typecode for this Program and date range, and the same user ID and reason code.
- **Total Trans Value -** The total value of the transactions for the particular activity typecode for this Program and date range, and the same user ID and reason code. Some activities, such as card activation or expiration date reset, may not have a transaction value. Other activities, such as issuing an award, can have a negative transaction value.
- Totals for Program: For all activity for the Program during the date range included on the report:
  - **Total Trans Count -** The total number of transactions for this Program and date range.
  - **Total Trans Value -** The total net value of transactions for this Program and date range.
- Totals for Typecode: For each Typecode (AWARD, LOYALTY, or TENDER) included on the report:
  - **Total Trans Count -** The total number of transactions for this Typecode and date range for all Programs included on the report.
  - **Total Trans Value -** The total net value of transactions for this Typecode and date range for all Programs included on the report.

- Report Totals:
  - **Total Trans Count** - The total number of transactions included on the report.
  - **Total Trans Value** - The total net value of transactions included on the report.

Award Management Reports

The Award Management Reports include:

- Award Account Activity Details Report
- Award Account Activity Errors Report
- Award Account Activity Trend Report
- Award Account Balance Report
- Award Account Error Trend Report
- Award Account Last Use Report
- Award Activity by Location Report
- Award Activity by Program Report
- Award Entitlement Expiration Report
- Award Entitlement Redemption (Trend) Report
- Award Entitlement Summary Report
- Award Program Balance Summary Report
- Award Program Definition Report
- Award Redemption Rate Report

Award Account Activity Details Report

This report presents detailed information about activities performed on one or more given Award Accounts.

Selection Criteria

- **Account ID** - The ID and Name identifying an Award Account. All Account IDs are selected by default. Optionally, select Search to work with the list of eligible Account IDs, search based on Account ID, or remove Account IDs from the list selected for the report.
- **Serial Number** - Optionally, enter a card's Serial Number to search for an award account by Serial Number rather than by Account ID.
- **Void Flag** - Optionally, select Yes or No to select Award Account activity based on whether the activity was voided.
- **Activity Type Code** - Codes identifying types of activity for an Account. All activity type codes are selected by default. Optionally, select Search to work with the list of eligible Activity Type Codes, search based on Activity Type Code, or remove Activity Type Codes from the list selected for the report. Possible Activity Type Codes include:
  - Account Merge
  - Activate Card
  - Automatic Redeem

  - De-Activate Card
  - Expire Coupon
  - Inquiry
  - Issue Birthday Coupon
  - Issue Coupon
  - Issue Entitlement Coupon
  - Issue Promo Award Coupon
  - Issue Signup Coupon
  - Notify Coupon Expire
  - Redeem
  - Reset Expiration Date
  - Void
- **Activity Time Period** - Optionally, select a time period to include activities that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  > **Note:**
  >
  > If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- **Activity Start Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **Activity End Date** - The last date to include on the report. Defaults to the current date (today).
- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of activity records for the entire report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.
- **Activity Type Code** - The list of activity type codes selected for the report. Set to ALL if there was no restriction.
- **Void Flag** - The void flag setting selected for the report. Set to ALL if there was no restriction.
- **Account ID** - The Account IDs selected when generating the report, or set to ALL if there was no restriction.
- **Serial Number** - The Serial Numbers selected when generating the report, or set to N/A if there was no restriction.

The Report Contents detail information includes:

- **Account ID** - Indicates the ID number for the account. For each Account ID included on the report, there are two rows of data including the following:
- **Workst. ID** - Identifies the workstation where the activity took place.
- **Award Trans. ID** - The transaction ID of the award.
- **Void Flag** - Set to Yes if the activity was voided; otherwise, set to No.
- **Notify Expiry Flag** - Set to Yes if an award expiration notification export file has been created that includes the account. Created through the Notify Awards Expire Job.
- **Coupon Code** - The coupon code affected by the activity, such as a coupon issue or redemption; otherwise, set to N/A.
- **Serial Number** - Unique serial number for the award.
- **Exchange Rate** - The rate of exchange between the transaction's original currency and the base currency. Set to 1 if the two currencies are the same. Set to 0 if the activity does not reference a specific amount, such as a card activation.
- **Activity Type** - Describes the type of activity. Possible types:
  - Account Merge
  - Activate Card
  - Automatic Redeem
  - De-Activate Card
  - Expire Coupon
  - Inquiry
  - Issue Birthday Coupon
  - Issue Coupon
  - Issue Entitlement Coupon
  - Issue Promo Award Coupon
  - Issue Signup Coupon
  - Notify Coupon Expire - Redeem
  - Reset Expiration Date
  - Void

- **Business Date** - The retail business date when the activity occurred.
- **Activity Date** - The date when the activity took place.
- **Loc. ID-Name** - The numeric ID and name of the location where the activity occurred.
- **Currency Code** - The currency code for the transaction. Included only if there is an Activity Amount.
- **Ref. Activity ID** - The activity ID affected by this activity, if any; otherwise, set to N/ A.
- **Retail Trans. Seq.** - The sequential transaction ID generated by the POS system, if any; otherwise, set to 0 or 1.
- **Retail Trans ID** - A sequence ID, generated by Customer Engagement Cloud Services, indicating the retail location ID, workstation ID, and transaction sequence number.
- **Create User** - The ID of the user that created the activity record.
- **Create Date** - The date when the activity was recorded in the database.
- **Comments** - The comments entered for the activity, if any; otherwise, set to N/A.
- **Error Code** - The error code associated with the activity, if any; otherwise, set to N/A.
- **Activity Amount** - The amount of the activity. Set to 0.00 if there is no associated amount, such as for a card activation.
- **Requested Amount** - The amount of the transaction in the requested currency. Same as the Activity Amount if there is no currency conversion.
- **Totals for the Account ID**:
  - **Activity Amount** - The total amount for activities for the Account ID that are included on the report.
  - **Requested Amount** - The total requested amount for the Account ID that are included on the report. The same as the total Activity Amount unless any requested amounts were in a different currency.
- **Report Totals**:
  - **Activity Amount** - The total amount for activities included on the report.
  - **Requested Amount** - The total requested amount for activities included on the report. The same as the total Activity Amount unless any requested amounts were in a different currency.

Award Account Activity Errors Report

This report presents detailed information about transaction errors associated with Award Accounts.

Selection Criteria

- **Program ID** - The ID and Name identifying a Program for a Card Definition. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program Name, or remove Programs from the list selected for the report.
- **Serial Number** - Optionally, enter a Card's Serial Number to search for a specific Account by Serial Number rather than by Program ID.
- **Error Code** - Codes identifying types of errors. All error codes are selected by default. Optionally, select Search to work with the list of eligible Error Codes, search based on

Error Code, or remove Error Codes from the list selected for the report. Possible Error Codes include:

- Account Already Active
- Account Expired
- Account Inactive
- Award Program Expired
- Award Program Not Effective
- Cannot Void Trans Type
- Card Expired
- Card Inactive
- Coupon ID Invalid for Expire
- Coupon ID Invalid or Expired
- Coupon Request Amount Invalid
- Coupon Request Date Invalid
- Coupon Request Exceeds Balance
- Coupon Request Neg Amt Invalid
- Currency Exchange Rate Not Found
- Currency ID Missing
- General Error
- Invalid Entitlement Deal
- Invalid Pin Provided
- Loyalty Award Account Error
- Minimum Balance Not Met
- Missing Pin Number
- No Physical Card
- Original Transaction Not Found
- Original Transaction Required
- Original Transaction Voided
- Reloads Not Permitted

- **Activity Time Period** - Optionally, select a time period to include activities that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days

  - This Week
  - This Month
  - This Year

> **Note:**
>
> If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- **Activity Start Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **Activity End Date** - The last date to include on the report. Defaults to the current date (today).
- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of activity error records for the entire report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.
- **Program ID** - The ID and Name identifying a Program for a Card Definition. Set to ALL if there was no restriction.
- **Error Code** - The list of error codes selected for the report. Set to ALL if there was no restriction.
- **Serial Number** - The serial numbers selected when generating the report. Set to N/ A if there was no restriction.

The Report Contents detail information includes:

- **Program ID** - The program ID and description.
- **Acct.ID** - Serial Number - Indicates the ID number and Serial Number for the account.

For each Account ID included on the report, there are two rows of data including the following:

- **Activity Type** - Describes the type of activity. Possible types:
  - Account Merge
  - Activate Card
  - Automatic Redeem
  - De-Activate Card
  - Expire Coupon - Inquiry
  - Issue Birthday Coupon
  - Issue Coupon
  - Issue Entitlement Coupon

- Issue Promo Award Coupon
- Issue Signup Coupon
- Notify Coupon Expire - Redeem
- Reset Expiration Date
- Void

- **Currency Code** - The currency code for the transaction. Included only if there is an Activity Amount; otherwise, set to N/A.
- **Workst. ID** - Identifies the workstation where the activity took place.
- **Award Trans. ID** - The transaction ID of the award.
- **Void Flag** - Set to Yes if the activity was voided; otherwise, set to No.
- **Coupon ID** - The unique identifier for the coupon affected by the activity, such as a coupon issue or redemption; otherwise, set to N/A.
- **Exchange Rate** - The rate of exchange between the transaction's original currency and the base currency. Set to 1 if the two currencies are the same. Set to 0 if the activity does not reference a specific amount, such as a card activation.
- **Retail Trans ID** - A sequence ID, generated by Customer Engagement Cloud Services, indicating the retail location ID, workstation ID, and transaction sequence number.
- **Create User** - The ID of the user that created the activity record.
- **Activity Date** - The date when the activity took place.
- **Create Date** - The date when the activity was recorded in the database.
- **Error Code** - The description of the error that occurred. Possible error codes include:
  - Account Already Active
  - Account Expired
  - Account Inactive
  - Award Program Expired
  - Award Program Not Effective
  - Cannot Void Trans Type
  - Card Expired
  - Card Inactive
  - Coupon ID Invalid for Expire
  - Coupon ID Invalid or Expired
  - Coupon Request Amount Invalid
  - Coupon Request Date Invalid
  - Coupon Request Exceeds Balance
  - Coupon Request Neg Amt Invalid
  - Currency Exchange Rate Not Found
  - Currency ID Missing
  - General Error
  - Invalid Entitlement Deal

  - Invalid Pin Provided
  - Loyalty Award Account Error
  - Minimum Balance Not Met
  - Missing Pin Number
  - No Physical Card
  - Original Transaction Not Found
  - Original Transaction Required
  - Original Transaction Voided
  - Reloads Not Permitted
- **Requested Amount -** The amount of the transaction in the requested currency. Same as the Activity Amount if there is no currency conversion.
- **Activity Amount -** The amount of the activity. Set to 0.00 if there is no associated amount, such as a card activation.
- **Totals for the Account ID**:
  - **Requested Amount -** The total requested amount for the Account ID included on the report. The same as the total Activity Amount unless any requested amounts were in a different currency.
  - **Activity Amount -** The total amount for activities for the Account ID included on the report.
- **Totals for the Program ID**:
  - **Requested Amount -** The total requested amount for the Program ID that were included on the report. The same as the total Activity Amount unless any requested amounts were in a different currency.
  - **Activity Amount -** The total amount for activities for the Program ID that were included on the report.
- **Report Totals**:
  - **Activity Amount -** The total amount for activities included on the report.
  - **Requested Amount -** The total requested amount for activities included on the report. The same as the total Activity Amount unless any requested amounts were in a different currency.

Award Account Activity Trend Report

This report presents daily counts of Award Transactions, organized by activity type, within a Program.

The report begins with two charts illustrating award account activity. One chart displays total activity counts for each date in the selected time period, while the other displays total activity amounts.

> **Note:**
>
> The charts on this report are useful only if you restrict the selection criteria to a single Program ID and Activity Type Code, so you can identify the totals for the type of activity. Otherwise, it would be difficult to determine the different totals for the same date but a different Program ID and Activity Type Code.

Selection Criteria

- **Program ID / Name -** The ID and Name identifying a Program for a Card Definition. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program Name, or remove Programs from the list selected for the report.
- **Activity Type Code -** Codes identifying types of activity for an account. All activity type codes are selected by default. Optionally, select Search to work with the list of eligible Activity Type Codes, search based on Activity Type Code, or remove
- **Activity Type Codes** from the list selected for the report. Possible Activity Type Codes include:
  - Account Merge
  - Activate Card
  - Automatic Redeem
  - De-Activate Card
  - Expire Coupon
  - Inquiry
  - Issue Birthday Coupon
  - Issue Coupon
  - Issue Entitlement Coupon
  - Issue Promo Award Coupon
  - Issue Signup Coupon
  - Notify Coupon Expire
  - Redeem
  - Reset Expiration Date
  - Void
- **Activity Time Period -** Optionally, select a time period to include activities that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days

  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

> **Note:**
>
> If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- **Activity Start Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **Activity End Date** - The last date to include on the report. Defaults to the current date (today).
- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of activity records for the entire report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

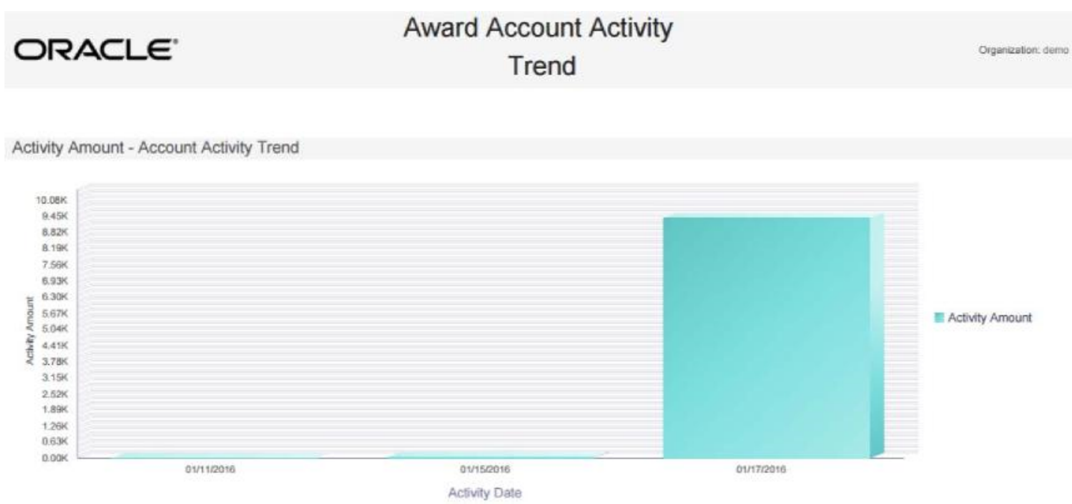
The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.
- **Activity Type Code** - The Activity Type Codes selected when generating the report. Set to ALL if there was no restriction.
- **Program ID** - The ID and Name identifying the Programs selected when generating the report. Set to ALL if there was no restriction.
- **Activity Count Chart** - Displays the total Activity Count for each Activity Type Code and Program ID by date.

Figure 13-5 Award Account Activity Trend Report – Activity Count Chart

- **Activity Amount Chart** - Displays the total Activity Amount for each Activity Type Code and Program ID by date.

Figure 13-6 Award Account Activity Trend Report - Activity Amount Chart



The Report Contents detail information includes:

- **Program ID** - The Program ID and description. For each Program:
- **Activity Type** - An entry for each type of activity that occurred for the program in the time period specified for the report. Possible Activity Type Codes include:
  - Account Merge
  - Activate Card
  - Automatic Redeem
  - De-Activate Card
  - Expire Coupon
  - Inquiry

  - Issue Birthday Coupon
  - Issue Coupon
  - Issue Entitlement Coupon
  - Issue Promo Award Coupon
  - Issue Signup Coupon
  - Notify Coupon Expire
  - Redeem
  - Reset Expiration Date
  - Void
- **Activity Date** - For each date when the Activity Type took place for the program during the date range selected when generating the report:
  - **Activity Count** - The total number of times the activity took place for that program, Activity Type, and date.
  - **Activity Amount** - The total value for the activity that took place for that program, Activity Type, and date. Set to 0.00 if there is no associated amount, such as for a card activation.
- **Totals for program and Activity Type** - For each Activity Type and Program during the date range selected when generating the report:
  - Activity Count - The total number of times the activity took place for that program.
  - Activity Amount - The total value for the activity that took place for that program.
- **Totals for program** - For each program included on the report:
  - Activity Count - The total number of activities of any type that took place during the date range selected when generating the report.
  - Activity Amount - The total value of activities of any type that took place during the date range selected when generating the report.
- **Report Totals**:
  - Activity Count - The total number of activities of any type, for any program, during the date range selected when generating the report.
  - Activity Amount - The total value of activities of any type, for any program, during the date range selected when generating the report.

Award Account Balance Report

This report presents the Account balance available at run time for each Account.

Selection Criteria

- **Program ID** - The ID and Name identifying a Program for a Card Definition. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program Name, or remove Programs from the list selected for the report.
- **Serial Number** - Optionally, enter a card's Serial Number to search for a particular Serial Number.
- **Account ID** - The ID identifying an award account. All Account IDs are selected by default. Optionally, enter an account ID to search for a particular account.

- **Include Expired Coupons?** - Indicates whether to include expired coupons on the report. Set to No by default.
- **Limit Records** - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of individual Serial Number/ Account ID records for the entire report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- I**nclude Expired Coupons** - Set to Yes if the Include Expired Coupons option was selected when generating the report; otherwise, set to No.

The Report Contents detail information includes:

- **Program ID** - The ID identifying a Program for a Card Definition.
- **Program Name** - The name of the Program.

For each Award Account included on the report:

- **Serial Number** - Unique serial number for the Award Account.
- **Account ID** - Indicates the ID number for the Account.
- **Number of Coupons** - The number of award coupons for the account.
- **Award Balance** - The total balance of the coupons.
- **Average Coupon Value** - The average value of the coupons (Award Balance / Number of Coupons).

Program Totals - For each Program included on the report:

- **Number of Coupons** - The number of award coupons for the Program.
- **Award Balance** - The total balance of the coupons.
- **Average Coupon Value** - The average value of the coupons (Award Balance / Number of Coupons).

Report Totals - For all Award Accounts included on the report:

- **Number of Coupons** - The number of award programs included on the report.
- **Award Balance** - The total balance of the coupons.
- **Average Coupon Value** - The average value of the coupons (Award Balance / Number of Coupons).

Award Account Error Trend Report

This report presents information about the number of times transaction errors occurred, by date, for each Program.

The report begins with a chart illustrating award error frequency.

> **Note:**
>
> The chart on this report is useful only if you restrict the selection criteria to a single Error Code, so you can identify the total for dates when this error occurred. Otherwise, it might be difficult to determine the totals for the same date but a different error.

Selection Criteria

- **Program ID / Name -** The ID and Name identifying a Program for a Card Definition. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program Name, or remove Programs from the list selected for the report.
- **Error Code -** Codes identifying types of errors. All error codes are selected by default. Optionally, select Search to work with the list of eligible Error Codes, search based on Error Code, or remove Error Codes from the list selected for the report. Possible Error Codes include:
  - Account Already Active
  - Account Expired
  - Account Inactive
  - Award Program Expired
  - Award Program Not Effective
  - Cannot Void Trans Type
  - Card Expired
  - Card Inactive
  - Coupon ID Invalid for Expire
  - Coupon ID Invalid or Expired
  - Coupon Request Amount Invalid
  - Coupon Request Date Invalid
  - Coupon Request Exceeds Balance
  - Coupon Request Neg Amt Invalid
  - Currency Exchange Rate Not Found
  - Currency ID Missing
  - General Error
  - Invalid Entitlement Deal
  - Invalid Pin Provided
  - Loyalty Award Account Error
  - Minimum Balance Not Met
  - Missing Pin Number
  - No Physical Card

   - Original Transaction Not Found
   - Original Transaction Required
   - Original Transaction Voided
   - Reloads Not Permitted
- **Activity Time Period** - Optionally, select a time period to include errors that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:
   - Yesterday
   - Last Week
   - Last Month
   - Last Year
   - Last 30 Days
   - Last 60 Days
   - Last 90 Days
   - This Week
   - This Month
   - This Year

   > **Note:**
   >
   > If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- **Activity Start Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **Activity End Date** - The last date to include on the report. Defaults to the current date (today).
- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of activity error records for the entire report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.
- **Error Code** - The Error Codes selected when generating the report. Set to ALL if there was no restriction.
- **Program ID** - The ID and Name identifying a Program selected when generating the report. Set to ALL if there was no restriction.

- **Error Count Chart** - Displays the total Error Count for each Error Code and Program ID by date.

Figure 13-7 Award Error Trend Report - Error Count Chart Report Contents

The Report Contents detail information includes:

- **Program ID** - The program ID and description.
- **Error Code** - The description of the error that occurred. Possible error codes include:
  - Account Already Active
  - Account Expired
  - Account Inactive
  - Award Program Expired
  - Award Program Not Effective
  - Cannot Void Trans Type
  - Card Expired
  - Card Inactive
  - Coupon ID Invalid for Expire
  - Coupon ID Invalid or Expired
  - Coupon Request Amount Invalid
  - Coupon Request Date Invalid
  - Coupon Request Exceeds Balance
  - Coupon Request Neg Amt Invalid
  - Currency Exchange Rate Not Found
  - Currency ID Missing
  - General Error
  - Invalid Entitlement Deal
  - Invalid Pin Provided

- Loyalty Award Account Error
- Minimum Balance Not Met
- Missing Pin Number
- No Physical Card
- Original Transaction Not Found
- Original Transaction Required
- Original Transaction Voided
- Reloads Not Permitted

- For each error included on the report:
  - **Activity Date -** The date when the error occurred.
  - **Error Count -** The total number the errors occurred for that program ID and date.
- **Total for each program -** The total number of errors for the program that were included on the report.
- **Report Totals -** The total number of errors that were included on the report.

Award Account Last Use Report

This report presents counts of Accounts within an Award Program, grouped by the number of days between last use date and system date at report run time.

Selection Criteria

- **Program ID** - The ID and Name identifying a Program for a Card Definition. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program Name, or remove Programs from the list selected for the report.
- **Limit Records** - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of date intervals for the entire report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Program ID** - The ID and Name identifying a Program for a Card Definition. Set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Program ID** - The Program ID and description. For each program included on the report:
- **Date Interval** - The range when accounts were last used. Possible ranges are Never Used, Less Than 30 Days, 31 to 60 Days, 61 to 90 Days, or Over 90 Days.
- **Number of Accounts -** The total number of Award Accounts that were used during the Date Interval.
- **Award Balance -** The total balance of Award Accounts that were used during the Date Interval.

- **Number of Coupons** - The total number of Award Coupons that were used during the Date Interval.
- **Average Coupon Value** - The average coupon value (Award Balance / Number of Coupons) used during the Date Interval.
- **Totals for Program** - For each program and date interval included on the report, the following totals are included:
- **Number of Accounts** - The total number of Award Accounts for the program, including those Never Used, included on the report.
- **Award Balance** - The total balance of Award Accounts for the Program included on the report.
- **Number of Coupons** - The total number of coupons for the Program included on the report.
- **Average Coupon Value** - The average coupon value (Award Balance / Number of Coupons) for the program included on the report.
- **The Report Totals** information includes:
  – Number of Accounts - The total number of Award Accounts included on the report.
  – Award Balance - The total balance of Award Accounts included on the report.
  – Number of Coupons - The total number of coupons included on the report.
  – Average Coupon Value - The average coupon value (Award Balance / Number of Coupons) included on the report.

Award Activity by Location Report

This report presents Award activity within a Program, by Location, for a selected date range.

Selection Criteria

- **Program ID / Name** - The ID and Name identifying a Program for a Card Definition. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program Name, or remove Programs from the list selected for the report.

  The related Card is not indicated here, but is listed on the generated report.
- **Location ID / Name** - The ID and Name identifying a retail Location. All Locations are selected by default. Optionally, select Search to work with the list of eligible Locations, search based on Location Name, or remove Locations from the list selected for the report.
- **Activity Type** - Codes identifying types of activity for an Award Account. All activity type codes are selected by default. Optionally, select Search to work with the list of eligible Activity Type Codes, search based on Activity Type Code, or remove Activity Type Codes from the list selected for the report. Possible Activity Type Codes include:
  – Account Merge
  – Activate Card
  – Automatic Redeem
  – De-Activate Card
  – Expire Coupon
  – Inquiry

  - Issue Birthday Coupon
  - Issue Coupon
  - Issue Entitlement Coupon
  - Issue Promo Award Coupon
  - Issue Signup Coupon
  - Notify Coupon Expire
  - Redeem
  - Reset Expiration Date
  - Void
- **Void Flag** - Optionally, select Yes or No to select award activity based on whether the activity was voided.
- **Activity Time Period** - Optionally, select a time period to include activities that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  > **Note:**
  >
  > If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- **Activity Start Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **Activity End Date** - The last date to include on the report. Defaults to the current date (today).

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.

- **Void Flag** - The void flag setting selected for the report. Set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Program ID** - The ID and Name identifying a Program for a Card Definition. For each Program ID included on the report:
- **Retail Location ID -** The ID of the location where the activity occurred.
- **Retail Location Name -** The name of the location where the activity occurred.
- **Activity Type -** Describes the type of activity. Possible types:
  - Account Merge
  - Activate Card
  - Automatic Redeem
  - De-Activate Card
  - Expire Coupon
  - Inquiry
  - Issue Birthday Coupon
  - Issue Coupon
  - Issue Entitlement Coupon
  - Issue Promo Award Coupon
  - Issue Signup Coupon
  - Notify Coupon Expire
  - Redeem
  - Reset Expiration Date
  - Void
- **Void Flag** - Set to Yes if the activity was voided; otherwise, set to No.
- **Transaction Count** - The total number of transactions for the activity included on the report for the Activity Type, Program ID, and Location ID.
- **Activity Amount** - The total amount of the activity included on the report for the Activity Type, Program ID, and Location ID. Set to 0.00 if there is no associated amount for the Activity Type, such as for a card activation.
- **Average Value** - The average value (total Activity Amount / Transaction Count) included on the report for the Activity Type, Program ID, and Location ID.
- **Totals for the Location ID**:
  - Transaction Count - The total number of transactions included on the report for the Program ID and Location ID.
  - Activity Amount - The total amount of transactions included on the report for the Program ID and Location ID.
  - Average Value - The average value (total Activity Amount / Transaction Count) included on the report for the Program ID and Location ID.
- **Totals for the Program ID**:
  - Transaction Count - The total number of transactions included on the report for the Program ID.

  - Activity Amount - The total amount of transactions included on the report for the Program ID.
  - Average Value - The average value (total Activity Amount / Transaction Count) included on the report for the Program ID.
- **Report Totals**:
  - Transaction Count - The total number of transactions included on the report.
  - Activity Amount - The total amount of transactions included on the report.
  - Average Value - The average value (total Activity Amount / Transaction Count) included on the report.

Award Activity by Program Report

This report presents a summary of Account activities, listed by type, for each Program.

Selection Criteria

- **Program ID / Name** - The ID and Name identifying a Program for a Card Definition. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program Name, or remove Programs from the list selected for the report.
- **Activity Type** - Codes identifying types of activity for an award account. All activity type codes are selected by default. Optionally, select Search to work with the list of eligible Activity Type Codes, search based on Activity Type Code, or remove Activity Type Codes from the list selected for the report. Possible Activity Type Codes include:
  - Account Merge
  - Activate Card
  - Automatic Redeem
  - De-Activate Card
  - Expire Coupon
  - Inquiry
  - Issue Birthday Coupon
  - Issue Coupon
  - Issue Entitlement Coupon
  - Issue Promo Award Coupon
  - Issue Signup Coupon
  - Notify Coupon Expire
  - Redeem
  - Reset Expiration Date
  - Void
- **Void** - Optionally, select Yes or No to select award activity based on whether the activity was voided.
- **Activity Time Period** - Optionally, select a time period to include activities that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:

  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

> **Note:**
>
> If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- **Activity Start Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **Activity End Date** - The last date to include on the report. Defaults to the current date (today).
- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of activity records for the entire report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.
- **The Activity Type Codes** selected when generating the report. Set to ALL if there was no restriction.
- **Program ID** - The ID and Name identifying a Program selected when generating the report. Set to ALL if there was no restriction.
- **Void Flag** - The void flag setting selected for the report. Set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Program ID** - The ID and Name identifying a Program for a Card Definition. For each Program ID included on the report:
- **Activity Type** - Describes the type of activity. Possible types:
  - Account Merge
  - Activate Card
  - Automatic Redeem

  - De-Activate Card
  - Expire Coupon
  - Inquiry
  - Issue Birthday Coupon
  - Issue Coupon
  - Issue Entitlement Coupon
  - Issue Promo Award Coupon
  - Issue Signup Coupon
  - Notify Coupon Expire
  - Redeem
  - Reset Expiration Date
  - Void
- **Void Flag** - Set to Yes if the activity was voided; otherwise, set to No.
- **Transaction Count** - The total number of transactions for the activity included on the report for the Activity Type and Program ID.
- **Activity Amount** - The total amount of the activity included on the report for the Activity Type and Program ID. Set to 0.00 if there is no associated amount for the Activity Type, such as for a card activation or expiration.
- **Average Value** - The average value (total Activity Amount / Transaction Count) included on the report for the Activity Type and Program ID.
- **Totals for the Program ID**:
  - **Transaction Count** - The total number of transactions included on the report for the Program ID.
  - **Activity Amount** - The total amount of transactions included on the report for the Program ID.
  - **Average Value** - The average value (total Activity Amount / Transaction Count) included on the report for the Program ID.
- **Report Totals**:
  - **Transaction Count** - The total number of transactions included on the report.
  - **Activity Amount** - The total amount of transactions included on the report.
  - **Average Value** - The average value (total Activity Amount / Transaction Count) included on the report.

Award Entitlement Expiration Report

This report presents a listing of the expiration dates of issued Entitlement Coupons, providing information on how many are due to expire or have expired.

Selection Criteria

- **Program ID / Name** - The ID and Name identifying a Program for a Card Definition. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program Name, or remove Programs from the list selected for the report.

- **Include Expired Coupons?** - Optionally, select Yes or No to select Entitlement Coupons based on whether the coupons have already expired.
- **Row Limit** - Optionally, use this field to specify the maximum number of Entitlement Coupons to include on the report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Include Expired Coupons** - The expiration setting selected for the report. Set to ALL if there was no restriction based on whether the coupons have already expired.
- **Program ID** - The ID and Name identifying a Program selected when generating the report. Set to ALL if there was no restriction.

The Report Contents detail information includes:

- Offer ID - The ID identifying a Offer.
- Offer Name - The name of a Offer. For each Offer included on the report:
- Offer Typecode - Describes the type of Offer. Possible types:
  - Buy X Get Set
  - Buy X Get X
  - Buy X Get Y
  - Fixed Quantity/Price
  - Gift with Purchase
  - Item Price Override
  - Kit
  - Line Item Discount
  - Nth Item Discount
  - Transaction Discount
  - Tiered Discount
- **Expiry Date** - The date when the Offer expires.
- **Coupon Count** - The total number of Coupons for the Offer with the same Expiry Date.
- Totals for the Offer ID:
  - **Coupon Count** - The total number of Coupons for the Offer.
- Report Totals:
  - Coupon Count - The total number of Coupons included on the report.

Award Entitlement Redemption (Trend) Report

This report presents a count of redeemed Entitlement Coupons for each Entitlement Offer.

The report begins with a series of charts illustrating entitlement redemption activity.

> **Note:**
>
> The charts on this report are useful only if you restrict the selection criteria to a single Offer, so you can identify the total dates and activities for the Offer. Otherwise, it might be difficult to determine the different totals for the same dates but for different Offers.

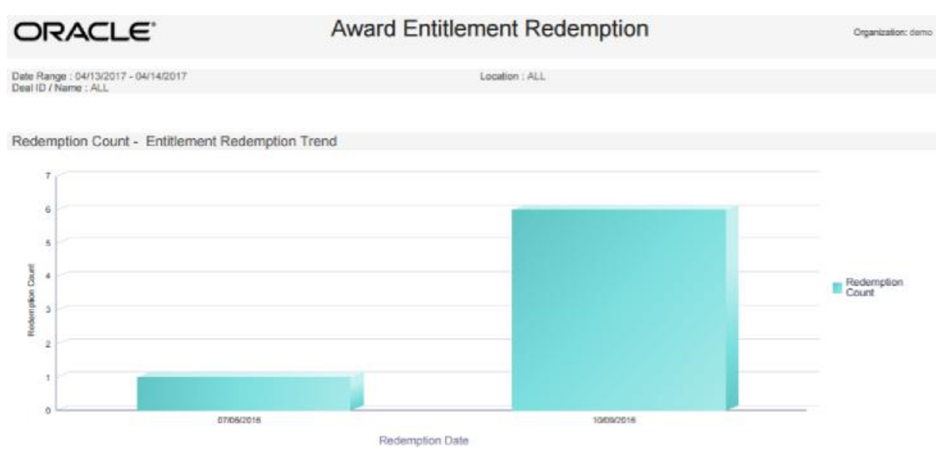
Selection Criteria

- **Offer ID / Name -** The ID and Name identifying an Offer. All Offers are selected by default. Optionally, select Search to work with the list of eligible Deals, search based on Offer Name, or remove Offers from the list selected for the report.
- **Location ID / Name** - The ID and Name identifying a retail Location. All Locations are selected by default. Optionally, select Search to work with the list of eligible Locations, search based on Location Name, or remove Locations from the list selected for the report.
- **Activity Time Period** - This criterion is not implemented for this report. All redemptions for the selected Offer and/or Location are eligible for inclusion, regardless of activity date.
- **Activity Start Date** - This criterion is not implemented for this report.
- **Activity End Date -** This criterion is not implemented for this report.
- **Row Limit -** Optionally, use this field to specify the maximum number of Offers with redemptions to include on the report.

Click **Apply** to apply the selected criteria and generate the report.

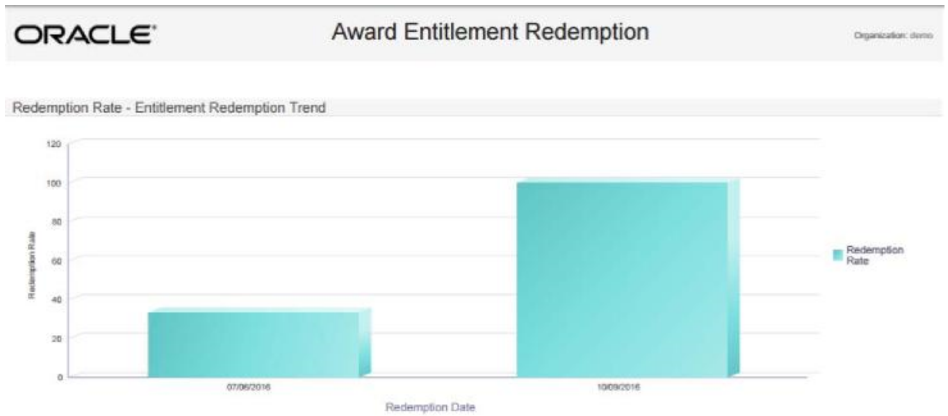
- **Entitlement Redemption Count Chart** - Displays the total redemption counts for each date.

Figure 13-8 Award Entitlement Redemption Report - Entitlement Redemption Count Chart



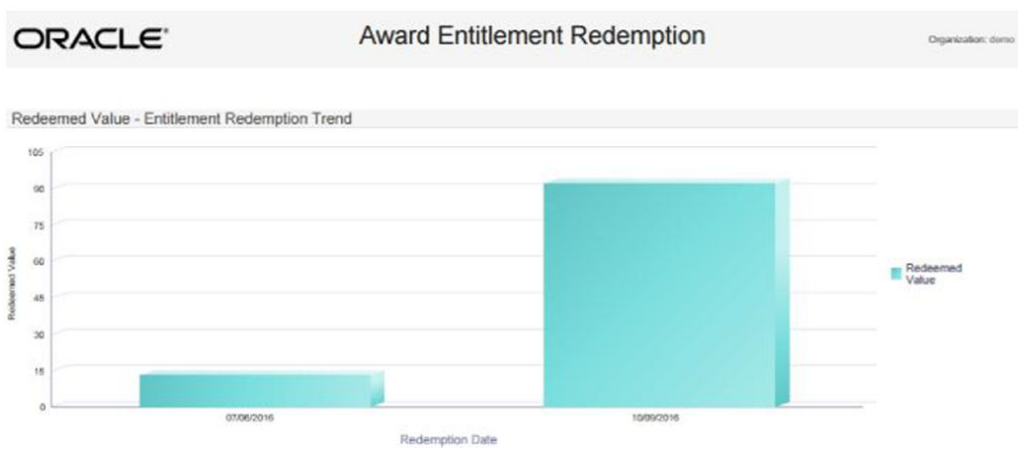
- **Entitlement Redemption Percentage Trend Chart -** Displays the percentage of the Offer redeemed for each date.

Figure 13-9 Award Entitlement Redemption Report - Entitlement Redemption Percentage Rate Chart



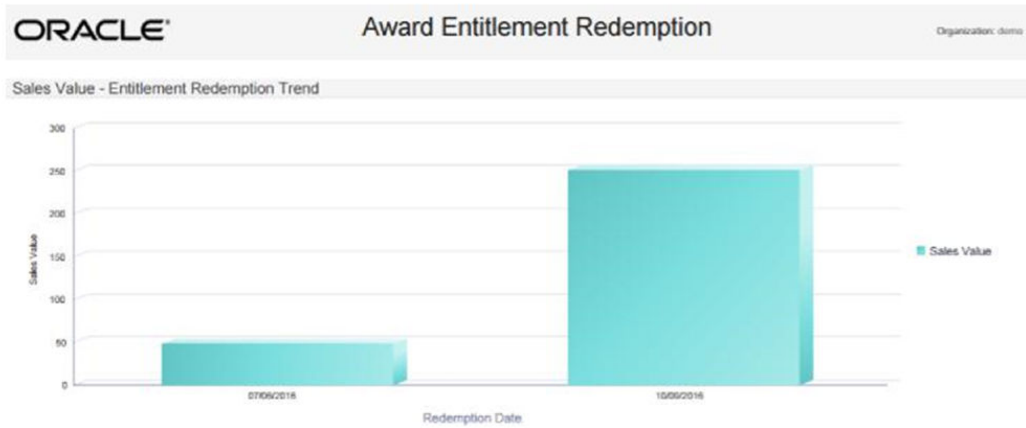
- **Entitlement Redemption Redeemed Value Trend Chart** - Displays the total redeemed value for the Offer for each date.

Figure 13-10 Award Entitlement Redemption Report - Entitlement Redemption Redeemed Value Chart



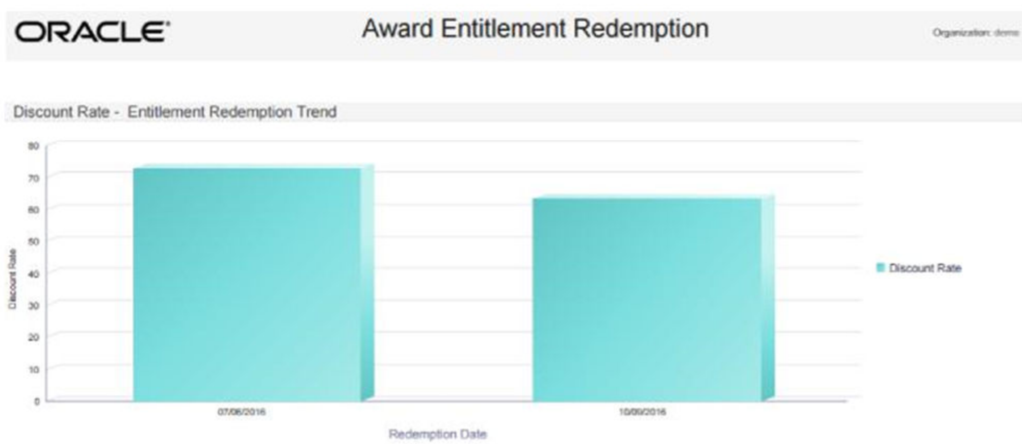
- **Entitlement Redemption Sales Value Trend Chart -** Displays the total sales value for the Offer for each date.

Figure 13-11 Award Entitlement Redemption Report - Entitlement Redemption Sales Value Chart



- **Entitlement Redemption Discount Rate Trend Chart** - Displays the discount percentage for the Offer for each date.

Figure 13-12 Award Entitlement Redemption Report - Entitlement Redemption Discount Rate Chart Report Contents



The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected for the report; however, the redemptions included on the report are not restricted by date range.
- **Location** - The ID of the Locations selected when generating the report. Set to ALL if there was no restriction.
- **Offer ID** - The ID of the Offers selected when generating the report. Set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Offer ID** - The ID identifying an Offer.
- **Offer Name** - The name of a Offer. For each Offer included on the report:

  Offer Type - Describes the type of Offer. Possible types:

  - Buy X Get Set
  - Buy X Get X
  - Buy X Get Y
  - Fixed Quantity/Price
  - Gift with Purchase
  - Item Price Override
  - Kit
  - Line Item Discount
  - Nth Item Discount
  - Transaction Discount
  - Tiered Discount
- **Status** - Indicates if the Offer is currently Active or Inactive.
- **Redemption Rate** - The Redemption Count / the Issue Count for the Offer on the date, presented as a percentage.
- **Discount Rate** - The average discount applied for the Offer on the date, presented as a percentage.
- **Redeemed Value** - The total value of the redemptions for the Offer on the date.
- **Sales Value** - The total value of all sales for the date.
- **Issue Count** - The number of times the Offer was issued for the date.
- **Redemption Count** - The number of times the Offer was redeemed for the date.
- Totals for the Offer Type:
  - **Redemption Rate** - The Redemption Count / the Issue Count for the Offer and Offer Type, presented as a percentage.
  - **Discount Rate** - The average discount applied for the Offer and Offer Type, presented as a percentage.
  - **Redeemed Value** - The total value of the redemptions for the Offer and Offer Type.
  - **Sales Value** - The total value of all sales for the Offer and Offer Type.
  - **Issue Count** - The number of times the Offer and Offer Type was issued.
  - **Redemption Count** - The number of times the Offer and Offer Type was redeemed.
- Totals for the Offer:
  - **Redemption Rate** - The Redemption Count / the Issue Count for the Offer, presented as a percentage.
  - **Discount Rate** - The average discount applied for the Offer, presented as a percentage.
  - **Redeemed Value** - The total value of the redemptions for the Offer.
  - **Sales Value** - The total value of all sales for the Offer.
  - **Issue Count** - The number of times the Offer was issued.
  - **Redemption Count** - The number of times the Offer was redeemed.
- Report Totals:

- **Redemption Rate** - The Redemption Count / the Issue Count included on the report, presented as a percentage.
- **Discount Rate** - The average discount applied for data included on the report, presented as a percentage.
- **Redeemed Value** - The total value of the redemptions included on the report.
- **Sales Value** - The total value of all sales included on the report.
- **Issue Coun**t - The number of times the Offers included on the report were issued.
- **Redemption Count** - The number of times the Offers included on the report were redeemed.

Award Entitlement Summary Report

This report displays the number of Issued Coupons for each Offer within an Entitlement program.

Selection Criteria

- **Activity Time Period** - Optionally, select a time period to include Award Entitlement Programs from this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  > **Note:**
  >
  > If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- **Activity Start Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **Activity End Date** - The last date to include on the report. Defaults to the current date (today).
- **Row Limit** - Optionally, use this field to specify the maximum number of Award Entitlement Programs to include on the report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report. Detail Information:
- **Program ID -** The ID and Name identifying an Award Entitlement Program for a Card Definition.
- For each Program ID included on the report:
- **Offer ID** - The ID identifying an Offer.
- **Offer Name -** The name of an Offer. For each Offer included on the report:
- **Offer Typecode** - Describes the type of Offer. Possible types:
  – Buy X Get Set
  – Buy X Get X
  – Buy X Get Y
  – Fixed Quantity/Price
  – Gift with Purchase
  – Item Price Override
  – Kit
  – Line Item Discount
  – Nth Item Discount
  – Transaction Discount
  – Tiered Discount
- **Status -** Indicates whether the Offer is currently Active.
- **Issue Count** - The total number of transactions where the award was issued.
- **Totals for Program ID**: The total number of Issues for the Program.
- **Report Totals:** The total number of Issues included on the report.

Award Program Balance Summary Report

This report presents summary statistics about current Account balances within each Award Program.

Selection Criterion:

- **Program ID / Name -** The ID and Name identifying a Program for a Card Definition. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program Name, or remove Programs from the list selected for the report.

Click **Apply** to apply the selected criterion and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Programs** - The ID and Name identifying the Programs selected when generating the report. Set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Program ID** - The ID identifying an Award Program for a Card Definition.
- **Program Name** - The Name identifying the Program. For each Program ID included on the report:
- **Balance Range** - The accounts are broken out into three brackets based on their current values:
  - Balance = 0
  - Between 1 and $50
  - Greater than 50
- **Number of Accounts** - The total number of accounts for the Program in each balance range.
- **Total Balance** - The total current value of the accounts for the Program in each balance range.
- **Average Balance** - The average balance for the accounts for the Program in each balance range: the Total Balance / Number of Accounts. Set to 0.00 if the balance range is 0.

The Program Totals for each Program included on the report:

- **Number of Accounts** - The total number of accounts for the Program.
- **Total Balance** - The total current value of the accounts for the Program.
- **Average Balance** - The average balance for the accounts for the Program: the Total Balance / Number of Accounts.

Report Totals:

- **Number of Accounts** - The total number of accounts for the Programs included on the report.
- **Total Balance** - The total current value of the accounts for the Programs included on the report.
- **Average Balance** - The average balance for the accounts for the Programs included on the report: the Total Balance / Number of Accounts.

Award Program Definition Report

This report presents details about each Award Program definition.

Selection Criteria

- **Program ID / Name** - The ID and Name identifying a Program for a Card Definition. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program Name, or remove Programs from the list selected for the report.

- **Activity Time Period** - Optionally, select a time period to include Programs active during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

> **Note:**
>
> If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- **Activity Start Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **Activity End Date** - The last date to include on the report. Defaults to the current date (today).
- **Row Limit** - Optionally, use this field to specify the maximum number of Programs to include on the report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Programs** - The ID and Name identifying the Programs selected when generating the report. Set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Program ID** - The ID and Name identifying a Program for a Card Definition.
- **Program Description** - The Description of the program.
- **Start Date** - The start date for the card series.
- **End Date** - The End Date defined for the program.
- **Program Currency Type** - The code identifying the currency for the card.
- **Initial Balance** - The Initial Account Balance defined for the award program for the card.
- **Card Required** - Set to Yes if Card required was selected for the program; otherwise, set to No.

- **Active Flag** - Set to Yes if the program is currently active; otherwise, set to No.
- **Allow Foreign Currency** - Set to Yes if Allow Foreign Currency was selected for the program; otherwise, set to No.
- **Allow Reload** - Set to Yes if Allow Reloads is selected for the program; otherwise, set to No.
- **Account Expire** - Set to 1 if Account Level Expiration is set to Yes for the program; otherwise, set to 0.
- **No. of Periods** - The number of periods, such as months, before the accounts expire.
- **Award Expiration** - Indicates the criteria, such as Rolling, for expiring the awards for the program; otherwise, set to None.
- **No of Periods** - The number of periods, such as months, before the awards expire.
- **Create Date** - The date when the program was created.
- **Create User** - The user ID of the person who created the program.
- **Update Date** - The most recent date when the program was updated.
- **Update User** - The user ID of the person who most recently updated the program.

Award Redemption Rate Report

This report presents information about the number of Award certificates issued & redeemed for each Card Prefix and Card Series by Program.

Selection Criteria

- **Program ID / Name** - The ID and Name identifying an Award Program for a Card Definition. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program Name, or remove Programs from the list selected for the report.
- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of individual card series for the entire report.

Click **Apply** to apply the selected criterion and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Program ID** - The ID and Name identifying the Programs selected when generating the report. Set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Program ID** - The ID identifying a Program for a Card Definition.
- **Program Name** - The Name identifying the Program. For each Program ID included on the report:
- **Card Prefix** - The five-digit prefix defined for the prefix identifying a card type.
- **Card Series Sequence** - The two-digit number identifying a series number for the Card Prefix. For each Card Series:

  - **Card Display Name -** The name defined for the Card Definition.
  - **Redemption Rate -** The total redemption rate for the Card Series, calculated as Total Redeemed Value / Total Issued Value. For example, if the Total Redeemed Value is 1000, and the Total Issued Value is 3430, the Redemption rate is .29 (1000/3430).
  - **Total Certificates Issued -** The total count of certificates issued for the Card Series.
  - **Total Issued Value** - The total value of the certificates issued for the Card Series.
  - **Total Redeemed Value -** The total value of certificates redeemed for the Card Series

The totals for each Card Prefix:

- **Total Certificates Issued** - The total count of certificates issued for the Card Prefix.
- **Total Issued Value** - The total value of the certificates issued for the Card Prefix.
- **Total Redeemed Value** - The total value of certificates redeemed for the Card Prefix. The totals for each Program:
- **Total Certificates Issued** - The total count of certificates issued for the Program.
- **Total Issued Value** - The total value of the certificates issued for the Program.
- **Total Redeemed Value** - The total value of certificates redeemed for the Program. Report Totals:
- **Total Certificates Issued** - The total count of certificates included on the report.
- **Total Issued Value** - The total value of the issued certificates included on the report.
- **Total Redeemed Value** - The total value of redeemed certificates included on the report.

Campaign Management Reports

The Campaign Management Reports include:

- Promotion Response by Category Report
- Promotion Response by Date Report
- Promotion Response by Deal Report
- Promotion Response by Location Report
- Promotion Response by Target Report
- Promotion Response Detail Report
- Promotion Target Details Report
- Promotion Target List Report
- Promotion Target Segment List Report

Promotion Response by Category Report

This report presents the event response, by Product Hierarchy, for the selected Promotion events, including items purchased. Only promotions that have had response are included.

Selection Criteria

- C**ampaign ID / Name -** The ID and Name identifying a Campaign. All Campaigns are selected by default. Optionally, select Search to work with the list of eligible Campaigns, search based on Campaign Name, or remove Campaigns from the list selected for the report.

- **Promotion ID / Name -** The ID and Name identifying a Promotion. All Promotions are selected by default. Optionally, select Search to work with the list of eligible Promotions, search based on Promotion Name, or remove Promotions from the list selected for the report.
- **Promotion Time Period -** Optionally, select a time period to include Promotions that have Start Dates during this period on the report rather than entering a Promotion Start Date or Promotion End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

> **Note:**
>
> If you select a Promotion Time Period, the Promotion Start Date is ignored.

- **Promotion Start Date -** The first Start Date to include on the report. Defaults to the previous date (yesterday).
- **Promotion End Date -** The last date to include on the report. Defaults to the current date (today). This criterion is not currently used.
- **Row Limit -** Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of individual Items for the entire report. If you specify a Row Limit, any promotions that do not specify items are not included.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization -** The code identifying your organization.
- **Date Range -** The date range selected when generating the report.
- **Campaign ID -** The Campaign IDs selected when generating the report, or set to ALL if there was no restriction.
- **Program ID -** The program IDs selected when generating the report, or set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Campaign** - The unique number identifying the Campaign.
  - **Promotion ID** - Name - Type - For each Offer for the Promotion included on the report:

    —**Promotion ID** - The unique number identifying the Promotion.

    —**Name** - The name describing the Promotion.

    —**Type** - Possible Promotion Types are Coupon, Product, Message, and Award.
  - **Item Dept ID** - Name - The unique number identifying and name describing the item department, if any; otherwise, set to N/A - N/A.
  - **Item Sub Dept ID** - Name - The unique number identifying and name describing the item subdepartment, if any; otherwise, set to N/A - N/A.
  - **Item Class ID** - Name - The unique number identifying and name describing the item class, if any; otherwise, set to N/A - N/A.
  - **Item Style ID** - The unique number identifying the item style, if any; otherwise, set to N/A.
  - **Start Date and End Date** - The Start Date and End Date specified for the Promotion.
  - **Purchase Quantity** - The total number of units purchased through the Promotion.
  - **Purchase Total** - The total revenue (Direct + Indirect) received from the Promotion Target.
  - **Customers Responded** - The total number of customers who redeemed a coupon for the Promotion.
  - **Average Spent** - The Customers Responded / the Purchase Quantity.
- Totals for Promotion:
  - **Purchase Quantity** - The total number of units purchased through the Promotion.
  - **Purchase Total** - The total revenue (Direct + Indirect) received from the Promotion Target.
  - **Customers Responded** - The total number of customers who redeemed a coupon for the Promotion.
  - **Average Spent** - The Customers Responded / the Purchase Quantity for the Promotion.
- Totals for Campaign:
  - **Purchase Quantity** - The total number of units purchased through the Campaign.
  - **Purchase Total** - The total revenue (Direct + Indirect) received from the Campaign.
  - **Customers Responded** - The total number of customers who redeemed a coupon for the Campaign.
  - **Average Spent** - The Customers Responded / the Purchase Quantity for the Campaign.
- Report Totals:
  - **Purchase Quantity** - The total number of units purchased through all Campaigns on the report.
  - **Purchase Total** - The total revenue (Direct + Indirect) received from all Campaigns on the report.
  - **Customers Responded** - The total number of customers who redeemed a coupon for all Campaigns on the report.

  - **Average Spent** - The Customers Responded / the Purchase Quantity for all Campaigns on the report.

Promotion Response by Date Report

This report summarizes the value of the response, by business date, to the selected Promotion events. Only promotions that have had responses are included.

Selection Criteria

- **Campaign ID / Name** - The ID and Name identifying a Campaign. All Campaigns are selected by default. Optionally, select Search to work with the list of eligible Campaigns, search based on Campaign Name, or remove Campaigns from the list selected for the report.

  If you select a Campaign, one or more Promotions may be selected automatically. If needed, set any remaining criteria to All to avoid restricting the report results to Promotion responses that match the automatically selected criteria.
- **Promotion ID / Name** - The ID and Name identifying a Promotion. All Promotions are selected by default. Optionally, select Search to work with the list of eligible Promotions, search based on Promotion Name, or remove Promotions from the list selected for the report.
- **Promotion Time Period** - Optionally, select a time period to include Promotions that have Start Dates during this period on the report rather than entering a Promotion Start Date or Promotion End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  > **Note:**
  >
  > If you select a Promotion Time Period, the Promotion Start Date is ignored.
- **Promotion Start Date** - The first Start Date to include on the report. Defaults to the previous date (yesterday).
- **Promotion End Date** - The last date to include on the report. Defaults to the current date (today). This criterion is not currently used.
- **Row Limit** - Optionally, use this field to specify the maximum number of Promotion Type rows to include on the report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.
- **Campaign ID** - The Campaign IDs selected when generating the report, or set to ALL if there was no restriction.
- **Program ID** - The program IDs selected when generating the report, or set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Campaign** - The unique number identifying the Campaign, and the name of the Campaign.
- For each Promotion included for the Campaign:
  - **Promo ID** - Name - The unique number identifying the Promotion, and the name describing the Promotion.
  - **Promo Type** - Possible types are Award, Coupon, Message, and Product.
  - **Start Date, End Date, and Business Date** - The Promotion's Start Date, End Date, and the first Business Date when a redemption occurred.
  - **Gross Margin (%)** - Gross Profit / Revenue.
  - **Number of Responders** - The total number of customers who responded to the Promotion.
  - **Trans Total** - The Total Revenue (Direct + Indirect) received from the Target for the Promotion.
  - **Direct Revenue** - The total extended selling price of all line items sold for the Target that were associated with the Promotion.
  - **Markdown Total** - The total value of markdowns applied to Indirect line items.
  - **Indirect Revenue** - The total extended selling price of all line items that were not associated with the Promotion, but included in the transactions.
  - **Cost of Goods Sold** - Total cost of goods sold to the Target for all line items, whether included in Direct or Indirect Revenue. Based on the item's Unit Cost.
  - **Gross Profit** - Total Revenue - Cost Of Goods Sold.
- Totals for Promotion by Business Date:
  - **Number of Responders** - The total number of customers who redeemed a coupon for the Promotion on the Business Date.
  - **Trans Total** - The Total Revenue (Direct + Indirect) received from the Target for the Promotion on the Business Date.
  - **Direct Revenue** - The total extended selling price of all line items sold on the Business Date for the Target that were associated with the Promotion.
  - **Markdown Total** - The total value of markdowns applied to Indirect line items.
  - **Indirect Revenue** - The total extended selling price of all line items that were not associated with the Promotion, but were included in the transactions.

- **Cost of Goods Sold** - Total cost of goods sold to the Target for all line items, whether included in Direct or Indirect Revenue. Based on the item's Unit Cost.
- **Gross Profit** - Total Revenue - Cost Of Goods Sold.

- Totals for Campaign:
  - **Number of Responders -** The total number of customers who redeemed a coupon for the Campaign.
  - **Trans Total** - Total Revenue (Direct + Indirect) received from the Target for the Campaign.
  - **Direct Revenue -** The total extended selling price of all line items sold for the Target that were associated with the Campaign.
  - **Markdown Total** - The total value of markdowns applied to Indirect line items.
  - **Indirect Revenue** - The total extended selling price of all line items that were not associated with the Campaign.
  - **Cost of Goods Sold** - Total cost of goods sold to the Target for all line items, whether included in Direct or Indirect Revenue.
  - **Gross Profit** - Total Revenue - Cost Of Goods Sold.
- Report Totals:
  - **Number of Responders** - The total number of customers who redeemed a coupon for a Promotion included on the report.
  - **Trans Total** - The Total Revenue (Direct + Indirect) received from the Target for a Promotion included on the report.
  - **Direct Revenue** - The total extended selling price of all line items sold for the Target that were associated with a Promotion included on the report.
  - **Markdown Total -** The total value of markdowns applied to Indirect line items.
  - **Indirect Revenue -** The total extended selling price of all line items that were not associated with a Promotion included on the report, but were included in the transactions.
  - **Cost of Goods Sold** - Total cost of goods sold to the Target for all line items, whether included in Direct or Indirect Revenue. Based on the item's Unit Cost.
  - **Gross Profit** - Total Revenue - Cost Of Goods Sold.

Promotion Response by Deal Report

This report summarizes the value of the response, by Offer, to the selected Promotion events. Only promotions that have had responses are included.

Selection Criteria

- **Campaign ID / Name** - The ID and Name identifying a Campaign. All Campaigns are selected by default. Optionally, select Search to work with the list of eligible Campaigns, search based on Campaign Name, or remove Campaigns from the list selected for the report.
- If you select a Campaign, one or more Promotions and Offers may be selected automatically. If needed, set any remaining criteria to All to avoid restricting the report results to Promotion responses that match the automatically selected criteria.

- **Promotion ID / Name** - The ID and Name identifying a Promotion. All Promotions are selected by default. Optionally, select Search to work with the list of eligible Promotions, search based on Promotion Name, or remove Promotions from the list selected for the report.
- **Offer ID / Name** - The ID and Name identifying an Offer. All Offers are selected by default. Optionally, select Search to work with the list of eligible Offers, search based on Offer Name, or remove Offers from the list selected for the report.
- **Promotion Time Period** - Optionally, select a time period to include Promotions that have Start Dates during this period on the report rather than entering a Promotion Start Date or Promotion End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  > **Note:**
  >
  > If you select a Promotion Time Period, the Promotion Start Date is ignored.

- **Promotion Start Date** - The first Start Date to include on the report. Defaults to the previous date (yesterday).
- **Promotion End Date** - The last date to include on the report. Defaults to the current date (today). This criterion is not currently used.
- **Row Limit** - Optionally, use this field to specify the maximum number of Offers to include on the report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.
- **Campaign ID** - The Campaign IDs selected when generating the report, or set to ALL if there was no restriction.
- **Program ID** - The program IDs selected when generating the report, or set to ALL if there was no restriction.

- **Offer Name** - The Offers selected when generating the report, or set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Campaign** - The unique number identifying the Campaign, and the name describing the Campaign.
- **Promo ID** - Name - The unique number identifying the Promotion, and the name describing the Promotion.
- For each Offer included for a Promotion:
  - **Start Date and End Date** - The Start Date and End Date for the Promotion.
  - **Target Name** - The name describing the Target. Unidentified is displayed as the Target Name for customers who responded to the Promotion, but do not exist in Oracle Retail Customer Engagement Cloud Services.
  - **Coupon Code** - The related Coupon Code.
  - **Offer ID** - Name - The unique numeric identifier for the Offer and the name describing the Offer.
  - **Offer Type** - Possible Offer types include:

    —Transaction Discount

    —Line Item Discount

    —Fixed Quantity/Price

    —Gift with Purchase

    —Buy X Get X

    —Buy X Get Y

    —Tiered Discount

    —Item Price Override

    —Buy X Get Set

    —Nth Item Discount
  - **Customers Responded** - The total number of customers who responded to the Offer.
  - **Transaction Count** - The total number of transactions using the Offer.
  - **Direct Revenue** - The total extended selling price of all line items sold for the Target that were associated with the Promotion and Offer.
  - **Total Discount** - Total amount of the discounts given through the Offer.
  - **Average Spent** - Direct Revenue / Customers Responded.
  - **Average Discount** - Total Discount / Customers Responded.
  - **Average Trans** - Direct Revenue / Transaction Count.
- Totals for Promotion:
  - **Customers Responded** - The total number of customers who responded to the Promotion.
  - **Transaction Count** - The total number of transactions using the Promotion.
  - **Direct Revenue** - The total extended selling price of all line items sold for the Target that were associated with the Promotion.

- **Total Discount** - Total amount of the discounts given through the Promotion.
- **Average Spent** - Direct Revenue / Customers Responded.
- **Average Discount** - Total Discount / Customers Responded.
- **Average Trans** - Direct Revenue / Transaction Count.

- Totals for Campaign:
  - **Customers Responded** - The total number of customers who responded to the Campaign.
  - **Transaction Count** - The total number of transactions using the Campaign.
  - **Direct Revenue** - The total extended selling price of all line items sold for the Target that were associated with the Campaign.
  - **Total Discount** - Total amount of the discounts given through the Campaign.
  - **Average Spent** - Direct Revenue / Customers Responded.
  - **Average Discount** - Total Discount / Customers Responded.
  - **Average Trans** - Direct Revenue / Transaction Count.
- Report Totals:
  - **Customers Responded** - The total number of customers who responded to a Promotion included on the report.
  - **Transaction Count** - The total number of transactions using a Promotion included on the report.
  - **Direct Revenue** - The total extended selling price of all line items sold for the Target that were associated with a Promotion included on the report.
  - **Total Discount** - Total amount of the discounts given through a Promotion included on the report.
  - **Average Spent** - Direct Revenue / Customers Responded.
  - **Average Discount** - Total Discount / Customers Responded.
  - **Average Trans** - Direct Revenue / Transaction Count.

Promotion Response by Location Report

This report summarizes the value of the response, by Location, to the selected Promotion events.

Selection Criteria

- **Campaign ID / Name** - The ID and Name identifying a Campaign. All Campaigns are selected by default. Optionally, select Search to work with the list of eligible Campaigns, search based on Campaign Name, or remove Campaigns from the list selected for the report.

  If you select a Campaign, one or more Promotions may be selected automatically. If needed, set any remaining criteria to All to avoid restricting the report results to Promotion responses that match the automatically selected criteria.
- **Promotion ID / Name** - The ID and Name identifying a Promotion. All Promotions are selected by default. Optionally, select Search to work with the list of eligible Promotions, search based on Promotion Name, or remove Promotions from the list selected for the report.

- **Location ID / Name** - The ID and Name identifying a Location. All Locations are selected by default. Optionally, select Search to work with the list of eligible Locations, search based on Location Name, or remove Locations from the list selected for the report.
- **Promotion Time Period** - Optionally, select a time period to include Promotions that have Start Dates during this period on the report rather than entering a Promotion Start Date or Promotion End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

> **Note:**
>
> If you select a Promotion Time Period, the Promotion Start Date is ignored.

- **Promotion Start Date** - The first Start Date to include on the report. Defaults to the previous date (yesterday).
- **Promotion End Date** - The last date to include on the report. Defaults to the current date (today). This criterion is not currently used.
- **Row Limit** - Optionally, use this field to specify the maximum number of promotion/ location combinations to include on the report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.
- **Campaign ID** - The Campaign IDs selected when generating the report, or set to ALL if there was no restriction.
- **Program ID** - The program IDs selected when generating the report, or set to ALL if there was no restriction.
- **Location ID** - The locations selected when generating the report, or set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Campaign** - The unique number identifying the Campaign, and the name of the Campaign.

- **Promo ID** - Name - The unique number identifying the Promotion, and the name describing the Promotion.
- **Promo Type** - Possible types are Award, Coupon, and Product.
- **Loc ID** - Name - The unique number identifying the Location, and the name describing the Location.
- **Start Date** - Start Date for the Promotion.
- **End Date** - End Date for the Promotion.
- **Gross Margin (%)** - Gross Profit / Revenue for the Promotion in the Location.
- **Customers Responded -** The total number of customers who responded to the Promotion at the Location.
- **Trans Count -** The total number of transactions for the Promotion at the Location.
- **Trans Total** - The Total Revenue (Direct + Indirect) received for the Promotion at the Location.
- **Direct Revenue** - The total extended selling price of all line items associated with the Promotion sold to the Target at the Location.
- **Markdown Total** - The total value of markdowns applied to Indirect line items.
- **Indirect Revenue -** The total extended selling price of all line items not associated with the Promotion sold to the Target at the Location.
- **Cost of Goods Sold** - Total cost of goods sold to the Target for all line items at the Location, whether the items are included in Direct or Indirect Revenue. Based on the item's Unit Cost.
- **Avg Spent** - Trans Total / Customers Responded for the Target at the Location.
- **Gross Profit** - Trans Total - Cost Of Goods Sold for the Target at the Location.
- **Totals for Promotion**:
  - **Customers Responded -** The total number of customers who responded to the Promotion at all Locations.
  - **Trans Count -** The total number of transactions for the Promotion at all Locations.
  - **Trans Total** - Total Revenue (Direct + Indirect) received for the Promotion at all Locations.
  - **Direct Revenue** - The total extended selling price of all line items associated with the Promotion sold to the Target at all Locations.
  - **Markdown Total -** The total value of markdowns applied to Indirect line items.
  - **Indirect Revenu**e **-** The total extended selling price of all line items not associated with the Promotion sold to the Target at all Locations.
  - **Cost of Goods Sold** - Total cost of goods sold to the Target for all line items at all Locations, whether included in Direct or Indirect Revenue.
  - **Avg Spent -** Trans Total / Customers Responded for the Target at all Locations.
  - **Gross Profit -** Trans Total **-** Cost Of Goods Sold for the Target at all Locations.
- **Totals for Campaign**:
  - C**ustomers Responded -** The total number of customers who responded to the Campaign.
  - **Trans Count** - The total number of transactions for the Campaign.

- **Trans Total** - Total Revenue (Direct + Indirect) received for the Campaign.
- **Direct Revenue** - The total extended selling price of all line items associated with the Campaign sold to the Target at all Locations.
- **Markdown Total** - The total value of markdowns applied to Indirect line items.
- **Indirect Revenue** - The total extended selling price of all line items not associated with the Campaign sold to the Target at all Locations.
- **Cost of Goods Sold** - Total cost of goods sold to the Target for all line items at the Location, whether included in Direct or Indirect Revenue.
- **Avg Spent** - Trans Total / Customers Responded for the Target of the Campaign at all Locations.
- **Gross Profit** - Trans Total - Cost Of Goods Sold for the Target of the Campaign at all Locations.

- **Report Totals**:
  - **Customers Responded** - The total number of customers who responded to any of the Campaigns included on the report.
  - **Trans Count** - The total number of transactions for the Campaigns included on the report.
  - **Trans Total** - Total Revenue (Direct + Indirect) received for the Campaigns included on the report.
  - **Direct Revenue** - The total extended selling price of all line items associated with a Campaign included on the report sold to the Target at all Locations included on the report.
  - **Markdown Total** - The total value of markdowns applied to Indirect line items.
  - **Indirect Revenue** - The total extended selling price of all line items not associated with the Campaign sold to the Target at all Locations.
  - **Cost of Goods Sold** - Total cost of goods sold to the Target for all line items at the Location, whether included in Direct or Indirect Revenue.
  - **Avg Spent** - Trans Total / Customers Responded for the Target of the Campaign at all Locations.
  - **Gross Profit** - Trans Total - Cost Of Goods Sold for the Target of the Campaign at all Locations.

Promotion Response by Target Report

This report includes response data, by Segment Target, for the selected Promotion events.

Selection Criteria

- **Campaign ID / Name** - The ID and Name identifying a Campaign. All Campaigns are selected by default. Optionally, select Search to work with the list of eligible Campaigns, search based on Campaign Name, or remove Campaigns from the list selected for the report.

  If you select a Campaign, one or more Promotions may be selected automatically. If needed, set any remaining criteria to All to avoid restricting the report results to Promotion responses that match the automatically selected criteria.

- **Promotion ID / Name** - The ID and Name identifying a Promotion. All Promotions are selected by default. Optionally, select Search to work with the list of eligible Promotions, search based on Promotion Name, or remove Promotions from the list selected for the report.
- **Promotion Time Period** - Optionally, select a time period to include Promotions that have Start Dates during this period on the report rather than entering a Promotion Start Date or Promotion End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

> **Note:**
>
> If you select a Promotion Time Period, the Promotion Start Date is ignored.

- **Promotion Start Date** - The first Start Date to include on the report. Defaults to the previous date (yesterday).
- **Promotion End Date** - The last date to include on the report. Defaults to the current date (today). This criterion is not currently used.
- **Row Limit** - Optionally, use this field to specify the maximum number of targets to include on the report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.
- **Campaign ID** - The Campaign IDs selected when generating the report, or set to ALL if there was no restriction.
- **Program ID** - The program IDs selected when generating the report, or set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Campaign** - The unique number identifying the Campaign, and the name of the Campaign.
- **Promo ID** - Name - The unique number identifying the Promotion, and the name describing the Promotion.

- **Promo Type** - Possible types are AWARD, COUPON, MESSAGE, and PRODUCT.
- **Start - End Date** - The Start Date and End Date for the Promotion.
- **Target Name** - The name describing the customers targeted.
- **Target Count** - The total number of customers contacted.
- **Customers Responded** - The total number of customers in the Target who responded to the Promotion.
- **Transaction Count** - The total number of transactions for the Promotion for the Target.
- **Promo Item Count** - The number of units sold of items that were eligible for the Promotion.
- **Revenue Total** - The total extended selling price of all line items for the Target.
- **Average Spent** - Revenue Total / Customers Responded for the Target.
- **Cost of Goods Sold** - Total cost of goods sold to the Target for all line items at the Location, whether the items included in Direct or Indirect Revenue. Based on the Unit Cost.
- **Markdown Total** - The total value of markdowns applied to Indirect line items.
- **Totals for Promotion**:
  - **Target Coun**t - The total number of customers contacted for the Promotion.
  - **Customers Responded -** The total number of customers in Targets who responded to the Promotion.
  - **Transaction Count** - The total number of transactions for the Promotion.
  - **Promo Item Count -** The number of units sold that were eligible for the Promotion.
  - **Revenue Total** - The total extended selling price of all line items for the Targets for the Promotion.
  - **Average Spent -** Revenue Total / Customers Responded for the Targets for the Promotion.
  - **Cost of Goods Sold** - Total cost of goods sold to the Targets for all line items associated with the Promotion, whether the items included in Direct or Indirect Revenue. Based on the Unit Cost.
  - **Markdown Total -** The total value of markdowns applied to Indirect line items.
- **Totals for Campaign**:
  - **Target Count -** The total number of customers contacted for the Campaign.
  - **Customers Responded** - The total number of customers in Targets who responded to the Campaign.
  - **Transaction Count** - The total number of transactions for the Campaign.
  - **Promo Item Count -** The number of units sold that were eligible for the Campaign.
  - **Revenue Total** - The total extended selling price of all line items for the Targets for the Campaign.
  - **Average Spent** - Revenue Total / Customers Responded for the Targets for the Campaign.
  - **Cost of Goods Sold -** Total cost of goods sold to the Targets for all line items associated with the Campaign, whether the items included in Direct or Indirect Revenue. Based on the Unit Cost.

  - **Markdown Total** - The total value of markdowns applied to Indirect line items.
- Report Totals:
  - **Target Count** - The total number of customers contacted for the Promotions included on the report.
  - **Customers Responded** - The total number of customers in Targets who responded to the Promotions included on the report.
  - **Transaction Count** - The total number of transactions for the Promotions included on the report.
  - **Promo Item Count** - The number of units sold that were eligible for the Promotions included on the report.
  - **Revenue Total** - The total extended selling price of all line items for the Targets for the Promotions included on the report.
  - **Average Spent** - Revenue Total / Customers Responded for the Targets for the Promotions included on the report.
  - **Cost of Goods Sold** - Total cost of goods sold to the Targets for all line items associated with the Promotions included on the1, whether the items included in Direct or Indirect Revenue. Based on the Unit Cost.
  - **Markdown Total** - The total value of markdowns applied to Indirect line items.

Promotion Response Detail Report

This report includes information about the Transactions created in response to Promotions.

Selection Criteria

- **Campaign ID / Name** - The ID and Name identifying a Campaign. All Campaigns are selected by default. Optionally, select Search to work with the list of eligible Campaigns, search based on Campaign Name, or remove Campaigns from the list selected for the report.

  If you select a Campaign, one or more Promotions may be selected automatically. If needed, set any remaining criteria to All to avoid restricting the report results to Promotion responses that match the automatically selected criteria.
- **Promotion ID / Name** - The ID and Name identifying a Promotion. All Promotions are selected by default. Optionally, select Search to work with the list of eligible Promotions, search based on Promotion Name, or remove Promotions from the list selected for the report.
- **Promotion Time Period** - Optionally, select a time period to include Promotions that have Start Dates during this period on the report rather than entering a Promotion Start Date or Promotion End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days

- This Week
- This Month
- This Year

> **Note:**
>
> If you select a Promotion Time Period, the Promotion Start Date is ignored.

- **Promotion Start Date** - The first Start Date to include on the report. Defaults to the previous date (yesterday).
- **Promotion End Date** - The last date to include on the report. Defaults to the current date (today). This criterion is not currently used.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report. Detail Information:
- **Campaign** - The unique number identifying the Campaign, and the name of the Campaign.
- **Promo ID** - Name - The unique number identifying the Promotion, and the name describing the Promotion.
- **Start Date** - Start Date for the Promotion.
- **End Date** - End Date for the Promotion.
- **Promo Type** - Possible types are AWARD, COUPON, MESSAGE, and PRODUCT.
- **Business Date -** The business date when the transaction took place.
- **Retail Transaction ID -** The transaction ID to reference retail location, workstation and transaction sequence number.
- **Customer ID** - Unique identifier for the customer.
- **Customer Name -** The customer's first and last name.
- **Transaction Total** - The total amount of the transaction, including the extended actual prices of items, but excluding any tax.
- **Direct Revenue** - The total extended selling price of all line items for the transaction that were associated with the Promotion.
- **Indirect Revenue** - The total extended selling price of all line items for the transaction that were not associated with the Promotion.
- **Markdown Total -** The total value of markdowns applied to Indirect line items for the transaction.
- **Cost of Goods Sold -** Total cost of goods sold for all line items on the transaction, regardless of whether the items are included in Direct or Indirect Revenue. Based on Unit Cost.
- **Gross Profit** - The Transaction Total - Cost of Goods Sold.

- **Gross Margin %** - The Gross Profit / Transaction Total, expressed as a percentage. For example, Gross Profit of 18.97 divided by Transaction Total of 56.93 produces a Gross Margin % of .33%.
- **Totals for Promotion**:
  - **Transaction Total** - The total amount of the transactions for the Promotion, including the extended actual prices of items, but excluding any tax.
  - **Direct Revenue** - The total extended selling price of all line items for the Transactions that were associated with the Promotion.
  - **Indirect Revenue** - The total extended selling price of all line items for the transactions that were not associated with the Promotion.
  - **Markdown Total** - The total value of markdowns applied to Indirect line items for the transactions.
  - **Cost of Goods Sold** - Total cost of goods sold for all line items on the transactions, regardless of whether the items are included in Direct or Indirect Revenue. Based on Unit Cost.
  - **Gross Profit** - The Promotion total of The Transaction Total - Cost of Goods Sold.
  - **Gross Margin %** - The Promotion total Gross Profit / Transaction Total, expressed as a percentage. For example, Gross Profit of 18.97 divided by Transaction Total of 56.93 produces a Gross Margin % of .33%.
- **Totals for Campaign**:
  - **Transaction Total** - The total amount of the transactions for the Campaign, including the extended actual prices of items, but excluding any tax.
  - **Direct Revenue** - The total extended selling price of all line items for the transactions that were associated with a Promotion for the Campaign.
  - **Indirect Revenue** - The total extended selling price of all line items for the transactions that were not associated with a Promotion for the Campaign.
  - **Markdown Total** - The total value of markdowns applied to Indirect line items for the transactions.
  - **Cost of Goods Sold** - Total cost of goods sold for all line items on the transactions, regardless of whether the items are included in Direct or Indirect Revenue. Based on Unit Cost.
  - **Gross Profit** - The Campaign total of The Transaction Total - Cost of Goods Sold.
  - **Gross Margin %** - The Campaign total Gross Profit / Transaction Total, expressed as a percentage. For example, Gross Profit of 18.97 divided by Transaction Total of 56.93 produces a Gross Margin % of .33%.
- **Report Totals**:
  - **Transaction Total** - The total amount of the transactions included on the report, including the extended actual prices of items, but excluding any tax.
  - **Direct Revenue** - The total extended selling price of all line items for the transactions associated with a Promotion included on the report.
  - **Indirect Revenue** - The total extended selling price of all line items for the transactions that were not associated with a Promotion.
  - **Markdown Total** - The total value of markdowns applied to Indirect line items for the transaction.

- **Cost of Goods Sold** - Total cost of goods sold for all line items on the transaction, regardless of whether the items are included in Direct or Indirect Revenue. Based on Unit Cost.
- **Gross Profit** - The total of The Transaction Total - Cost of Goods Sold that were included on the report.
- **Gross Margin %** - The total Gross Profit / Transaction Total included on the report, expressed as a percentage. For example, Gross Profit of 18.97 divided by Transaction Total of 56.93 produces a Gross Margin % of .33%.

Promotion Target Details Report

This report displays Customer information for the segment targeted in each Promotion.

Selection Criteria

- **Campaign ID / Name** - The ID and Name identifying a Campaign. All Campaigns are selected by default. Optionally, select Search to work with the list of eligible Campaigns, search based on Campaign Name, or remove Campaigns from the list selected for the report.
- If you select a Campaign, one or more Promotions, Targets, and Customers may be selected automatically. If needed, set any remaining criteria to All to avoid restricting the report results to data that match the automatically selected criteria.
- **Promotion ID / Name** - The ID and Name identifying a Promotion. All Promotions are selected by default. Optionally, select Search to work with the list of eligible Promotions, search based on Promotion Name, or remove Promotions from the list selected for the report.
- **Target Name** - The name describing the group of Customers targeted for a Promotion. All Targets associated with a selected Promotion are selected by default. Optionally, select Search to work with the list of eligible Targets, search based on Target Name, or remove Targets from the list selected for the report.
- **Customer ID / Name** - The ID and Name identifying a Customer. All Customers that have been included in a selected Target are selected by default. Optionally, select Search to work with the list of eligible Customers, search based on Customer Name, or remove Customers from the list selected for the report.
- **Customer Alternate Key Types** - The Alternate Key Types identifying a Customer in an integrated system. All Alternate Key Types are selected by default. Optionally, select Search to work with the list of eligible Alternate Key Types, search based on Alternate Key Type Name, or remove Alternate Key Types from the list selected for the report.
- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. Each row includes a Customer record and unique Alternate Key Type. For example, if a customer has three Alternate Keys, the customer is included on the report in three separate rows.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.

- **Promotion ID / Name -** The Program IDs selected when generating the report, or set to ALL if there was no restriction.
- **Campaign ID / Name -** The Campaign IDs selected when generating the report, or set to ALL if there was no restriction.
- **Customer Alt Key Type -** The Customer alt key types selected when generating the report, or set to N/A if there was no restriction.
- **Customer ID / Name -** The Customer ID / Names selected when generating the report, or set to ALL if there was no restriction.
- **Target Name -** The Target names selected when generating the report, or set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Campaign** - The unique number identifying the Campaign, and the name of the Campaign.
- For each unique Customer/Alternate Key included on the report:
  - **Promo ID** - Name **-** The unique number identifying the Promotion, and the name describing the Promotion.
  - **Target Name -** The name describing the customers targeted.
  - **Customer ID** - Unique identifier for the Customer.
  - **Customer Name -** Customer Last Name.
  - **Alt Key Type** - Name identifying the type of Alternate Key. Typically, identifies the integrating system assigning the Alternate Key.
  - **Alternate ID -** The unique identifier for the Customer in the integrating system.
  - **Address** - The Customer's primary street address.
  - **City** - The City for the Customer's primary address.
  - **State -** The state or province for the Customer's primary address.
  - **Postal Code** - The postal or ZIP code for the Customer's primary address.

This report does not include any totals.

Promotion Target List Report

This report displays information about the Segment Targets associated with the Promotions within a Campaign.

Selection Criteria

- **Campaign ID / Name -** The ID and Name identifying a Campaign. All Campaigns are selected by default. Optionally, select Search to work with the list of eligible Campaigns, search based on Campaign Name, or remove Campaigns from the list selected for the report.

  If you select a Campaign, one or more Promotions and Targets may be selected automatically. If needed, set any remaining criteria to All to avoid restricting the report results to data that match the automatically selected criteria.
- **Promotion ID / Name** - The ID and Name identifying a Promotion. All Promotions are selected by default. Optionally, select Search to work with the list of eligible Promotions, search based on Promotion Name, or remove Promotions from the list selected for the report.

- **Target Name** - The name describing the group of Customers targeted for a Promotion. All Targets are selected by default. Optionally, select Search to work with the list of eligible Targets, search based on Target Name, or remove Targets from the list selected for the report.
- **Promotion Time Period** - Optionally, select a time period to include Promotions that have Start Dates during this period on the report rather than entering a Promotion Start Date or Promotion End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  > **Note:**
  >
  > If you select a Promotion Time Period, the Promotion Start Date is ignored.

- **Promotion Start Date** - The first Start Date to include on the report. Defaults to the previous date (yesterday).
- **Promotion End Date** - The last date to include on the report. Defaults to the current date (today). This criterion is not currently used.
- **Row Limit** - Optionally, use this field to specify the maximum number of targets to include on the report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

Organization - The code identifying your organization.

- **Date Range** - The date range selected when generating the report. Detail Information:
- **Campaign** - The unique number identifying the Campaign, and the name of the Campaign.
- **Promotion** - The unique number identifying the Promotion, and the name describing the Promotion.
- **Start Date** - The Promotion's Start Date.
- **End Date** - The Promotion's End Date.
- **For each Target included on the report**:
  - **Target Name** - The name describing the customers targeted.

  - **Base Target Count** - The total number of customers in the Target.
  - **Household Filter?** - Set to Yes if Customer Household Consolidation was selected for the Target in the Promotion.
  - **Household Count** - The total number of households in the Target. May be lower than the Base Target Count if Customer Household Consolidation took place for the Target in the Promotion.
  - **Filtered?** - Set to Yes if filtering took place when selecting members of the Target for the Promotion.
  - **Filtered Count** - The total number of Customer records from the Target that were selected for the Promotion after filtering.
  - **Filter Type** - The type of filtering applied, if any. Possible types are Top Sales and Random.
  - **Control Group Count** - The total number of Customer records from the Target, if any, that were assigned to the Control Group for the Promotion.
  - **Control Group Type** - The Control Group Type selected, if any. Possible types are Promotion Level and Target Level.
- **Totals for Promotion**:
  - **Base Target Count** - The total number of customers for the Promotion.
  - **Household Count** - The total number of households for the Promotion. May be lower than the Base Target Count if Customer Household Consolidation took place for a Target in the Promotion.
  - **Filtered Count** - The total number of Customer records that were selected for the Promotion after filtering any of the Targets.
  - **Control Group Count** - The total number of Customer records that were assigned to a Control Group for the Promotion.
- **Totals for Campaign**:
  - **Base Target Count** - The total number of customers for the Campaign.
  - **Household Count** - The total number of households for the Campaign. May be lower than the Base Target Count if Customer Household Consolidation took place for a Target in the Campaign.
  - **Filtered Count** - The total number of Customer records that were selected for the Promotions in the Campaign after filtering any of the Targets.
  - **Control Group Count** - The total number of Customer records that were assigned to a Control Group for the Campaign.
- **Report Totals:**
  - **Base Target Count** - The total number of customers for the Targets included on the report.
  - **Household Count** - The total number of households for the Targets included on the report. May be lower than the Base Target Count if Customer Household Consolidation took place for a Target.
  - **Filtered Count** - The total number of Customer records that were selected for the Promotions included on the report after filtering any of the Targets.
  - **Control Group Count** - The total number of Customer records that were assigned to a Control Group for a Target included on the report.

Promotion Target Segment List Report

This report presents the Target Segments associated with Promotions within a Campaign.

Selection Criteria

- **Campaign ID / Name** - The ID and Name identifying a Campaign. All Campaigns are selected by default. Optionally, select Search to work with the list of eligible Campaigns, search based on Campaign Name, or remove Campaigns from the list selected for the report.
- If you select a Campaign, one or more Promotions may be selected automatically. If needed, set any remaining criteria to All to avoid restricting the report results to data that match the automatically selected criteria.
- **Promotion ID / Name** - The ID and Name identifying a Promotion. All Promotions are selected by default. Optionally, select Search to work with the list of eligible Promotions, search based on Promotion Name, or remove Promotions from the list selected for the report.
- **Promotion Status** - The Promotion status to include on the report. All statuses are selected by default. Optionally, select Search to work with the list of eligible statuses, search based on status name, or remove statuses from the list selected for the report.
- **Promotion Time Period -** Optionally, select a time period to include Promotions that have Start Dates during this period on the report rather than entering a Promotion Start Date or Promotion End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  > **Note:**
  >
  > If you select a Promotion Time Period, the Promotion Start Date is ignored.

- **Promotion Start Date** - The first Start Date to include on the report. Defaults to the previous date (yesterday).
- **Promotion End Date** - The last date to include on the report. Defaults to the current date (today). This criterion is not currently used.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report. Detail Information:
- **Campaign** - The unique number identifying the Campaign, and the name describing the Campaign.
- **Promo ID** - The unique number identifying the Promotion.
- **Promotion Name** - The name describing the Promotion.
- **Promotion Type** - The type of Promotion. Possible types are AWARD, COUPON, MESSAGE, and PRODUCT.
- **Status** - The current status of the Promotion. Possible statuses are Approved, Clear, Conflict, Saved, and Terminated.
- **Start Date** - The Start Date for the Promotion.
- **End Date** - The End Date for the Promotion.
- **For each Target**:
  - **Target Name** - The Name describing the Target.
  - **Segment ID** - A unique numeric identifier for the Segment used as the Target.
  - **Segment Name** - The Name describing the Segment used as the Target.

This report does not include any totals.

Card Management Reports

The Card Management Reports include:

- Card Batch Activation Rate Report
- Card Detail Report
- Card Series Activation Rate Report

Card Batch Activation Rate Report

This report displays the activation rate for each Batch within each Card Series on the Card Prefix.

Selection Criteria

- **Card Prefix** - The numeric prefix identifying a Card program. All Card Prefixes are selected by default. Optionally, select Search to work with the list of eligible Card Prefixes, search based on Card Prefix, or remove Card Prefixes from the list selected for the report.

  If you select a Card Prefix, one or more Card Series Sequences may be selected automatically. If needed, set any remaining criteria to All to avoid restricting the report results to Card Series Sequences that match the automatically selected criteria.
- **Card Series Sequence** - The sequence number identifying a generated Card Series.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Card Prefix** - The Card Prefixes selected when generating the report, or set to ALL if there was no restriction.
- **Card Series Sequence** - The Card Series Sequence numbers selected when generating the report, or set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Card Prefix** - The numeric prefix identifying a Card program.
- **Card Series Sequence** - The sequence number identifying a generated Card Series.
- **Card Series Description** - The name describing the Card Series.
- **For each Batch in the Card Series Sequence**:
  - **Batch Number** - Batch Name **-** The unique number identifying a batch, and the name describing the batch.
  - **Batch Size** - The number of Cards generated in the Batch.
  - **Active Flag** - Always set to Yes. Batches that are not fully active are not included on the report.
  - **Activation Rate** - The percentage of the Cards in the Batch that are currently active. For example, if the Batch includes 1000 cards, and 150 are currently active, the Activation Rate is 15%.
  - **Card Count** - The number of currently active Cards in the Batch.
- **Totals for Card Series** - The number of currently active Cards in the Series.
- **Total for Card Prefix** - The number of currently active Cards for the Card Prefix.
- **Report Totals** - The number of activated Cards for all Card Prefixes on the report.

Card Detail Report

This report presents detailed information about individual Cards defined in the system.

Selection Criteria

- **Card Prefix** - The numeric prefix identifying a Card program. All Card Prefixes are selected by default. Optionally, select Search to work with the list of eligible Card Prefixes, search based on Card Prefix, or remove Card Prefixes from the list selected for the report.

  If you select a Card Prefix, the remaining criteria may be selected automatically. If needed, set any remaining criteria to All to avoid restricting the report results to Cards that match the automatically selected criteria.
- **Card Series Sequence** - The sequence number identifying a generated Card Series. All Card Series Sequences are selected by default. Optionally, select Search to work with the list of eligible Card Series Sequences, search based on Card Series Sequence, or remove Card Series Sequences from the list selected for the report.
- **Batch Number** - The system-assigned number identifying a batch for a Card Series. All Batch Numbers are selected by default. Optionally, select Search to work with the list of

eligible Batch Numbers, search based on Batch Number, or remove Batch Numbers from the list selected for the report.

- **Serial Number -** The system-assigned number identifying a card, where the first five positions is the Card Prefix, the next two positions are the Card Series Sequence, the next three positions are the Batch Number, and the remaining positions uniquely identify the Card within the Prefix, Sequence, and Batch. All Serial Numbers are selected by default. Optionally, select Search to work with the list of eligible Serial Numbers, search based on Serial Number, or remove Serial Numbers from the list selected for the report.
- **Card Activation Time Period** - Optionally, select a time period to include Cards that have been activated during this period on the report rather than entering a Card Activation Start Date or Card Activation End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  > **Note:**
  >
  > If you select a Card Activation Time Period, the Card Activation Start Date is ignored.

- **Card Activation Start Date** - The first Card Activation Date to include on the report. Defaults to the previous date (yesterday).
- **Card Activation End Date -** The last date to include on the report. Defaults to the current date (today). This criterion is not currently used.
- **Row Limit -** Optionally, use this field to specify the maximum number of batches to include on the report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization -** The code identifying your organization.
- **Date Range** - The date range selected when generating the report.
- **Card Prefix -** The Card Prefixes selected when generating the report, or set to ALL if there was no restriction.
- **Card Series Sequence -** The Card Series Sequence numbers selected when generating the report, or set to ALL if there was no restriction.

- **Serial Number** - The Serial Numbers selected when generating the report, or set to ALL if there was no restriction.
- **Batch Number -** The Batch Numbers selected when generating the report, or set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Card Prefix -** The numeric prefix identifying a Card program.
- **Card Series Sequence** - Card Name - Card Series Description:
  - **Card Series Sequence** - The sequence number identifying a generated Card Series.
  - **Card Name** - The name describing the Series.
  - **Card Series Description** - The description of the Card Series.
- **Batch Number - Batch Display Name** - The unique number identifying a batch, and the name describing the batch. The Batch Number defaults to 001, and the Batch Name defaults to [Batch-001].
- **Serial Number** - The system-assigned number identifying a Card, where the first five positions is the Card Prefix, the next two positions is the Card Series Sequence, the next three positions is the Batch Number, and the remaining positions uniquely identify the Card within the Prefix, Sequence, and Batch.
- **Card Number** - The unique card number identifying a Card.
- **Active Flag** - Set to Yes if the Card is currently active, or set to No if the Card has been deactivated. Only Cards that have been activated are included on the report.
- **Activation Date** - The date when the Card was first activated. If the Card has been deactivated and then reactivated, the original activation date is displayed.
- **First Use Date** - The first date when there was any activity on the Card.
- **Last Use Date** - The most recent date when there was any activity on the Card. There are no totals on the report.

Card Series Activation Rate Report

This report presents the activation rate for each Card Series created for each Card Type.

Selection Criteria

- **Card Prefix -** The numeric prefix identifying a Card program. All Card Prefixes are selected by default. Optionally, select Search to work with the list of eligible Card Prefixes, search based on Card Prefix, or remove Card Prefixes from the list selected for the report.

Click **Apply** to apply the selected criterion and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Card Prefix** - The Card Prefixes selected when generating the report, or set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Card Prefix** - The numeric prefix identifying a Card program.
- **Card Series** - The sequence number identifying a generated Card Series.
- **Card Name** - The name describing the Card.
- **Card Series Description** - The description of the Card Series.
- **Active Series Flag** - Always set to Yes. Series are included on the report only if at least some of the generated cards are active.
- **Number of Batches** - The total number of batches generated for the Card Series that is at least partially active.
- **Total Card Count** - The total number of cards generated for a Card Series that is at least partially active.
- **Active Card Count -** The total number of currently active Cards in the Series.
- **Activation Rate -** The percentage of Cards in the Series that are currently active: Active Card Count / Total Card Count.
- **Total for Card Prefix** - The totals for the Card Series and Card Prefix. Repeats the Number of Batches, Total Card Count, and Active Card Count from the previous line on the report.
- **Report Totals**:
  - **Number of Batches -** The total number of batches for all Card Prefixes included on the report.
  - **Total Card Count -** The total number of Cards in all batches that are at least partially active for all Card Prefixes included on the report.
  - **Active Card Count -** The total number of currently active Cards included on the report.

Customer Management Reports

The Customer Management Reports include:

- Address Summary Report
- Birthday Summary Report
- Customer Alt Key Summary Report
- Customer Associate Assignment by Associate and Role Report
- Customer Contact Email List Report
- Customer Contact Phone List Report
- Customer Purchase by Department by Year Report
- Customer Status Summary Report
- Gender Summary Report
- Location (Store) Capture Rate Report
- Postal Code Summary Report
- Social Network Summary Report
- State Summary Report
- Summary Detail Report

Address Summary Report

This report presents a count of Customers by address type, grouped by whether they are primary or valid.

Selection Criteria

- **Valid Flag** - Indicates whether an address has failed validation. Set to All by default. Optionally, select All to display options, including Yes for only Valid addresses or No for only invalid addresses to include in the totals on the report.
- **Activity Start Date** - Select the first date to include on the report.
- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of unique categories, based on combination of Address Type, Valid Address setting, and Address Status, to include on the report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Start Range** - The Activity Start Date selected when generating the report.
- **Valid Flag Setting** - The selected setting of the Valid Flag: Yes, No, or ALL.

The Report Contents detail information includes:

> **Note:**
>
> For each Address Type, Valid Address setting, and Address Status combination for which any addresses were created since the Activity Start Date.

- **Address Type** - The user-defined address type that was created.
- **Valid Address** - If Customer Validation is enabled, set to No for any addresses that failed validation; otherwise, set to Yes.
- **Address Status** - Indicates if the addresses are flagged as Primary or Not Primary.
- **Customer Count** - The total number of customer records that had an address created matching the category of Address Type, Valid Address setting, and Address Status.
- **Percentage** - The percentage of all customer address activity on the report that is represented by the category of Address Type, Valid Address setting, and Address Status: Customer Count for the category / Customer Count for the entire report.
- **Report Totals**:
  - Customer Count - The total number of customers who had addresses created since the Activity Start Date.
  - Percentage - Set to 100%.

Birthday Summary Report

This report presents a count of Customers by birth month. Customers are included in the totals only if their birthday months are known.

Selection Criteria

- **Time Period** - Optionally, select a time period to include Customers whose records were created during this period on the report rather than entering a Customer Sign Up Date From or Customer Sign Up Date To. Customer records created on or after this date, and on or before the Customer Sign Up Date To, are included in the totals, even if their birthdays were not specified until after this range of dates. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  > **Note:**
  >
  > If you select a Time Period, the Customer Sign Up Date From and Customer Sign Up Date To criteria are ignored.

- **Customer Sign Up Date From** - The first date to include on the report. Customer records created on or after this date, and on or before the Customer Sign Up Date To, are included in the totals, even if their birthdays were not specified until after this range of dates. Defaults to the previous date (yesterday).
- **Customer Sign Up Date To** - The last date to include on the report. Defaults to the current date (today).
- **Row Limit** - Optionally, use this field to specify the maximum number of months, starting with January, to include on the report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.

- **Customer Sign Up Date Range** - The date range selected when generating the report. Detail Information:
- **Birth Month** - The month when the Customers' birthday occurs.
- **Customer Count** - The total number of Customer records created during the specified date range that have birthdays during this month.
- **Percent** - The percentage of all Customer records included on the report with birthdays during this month: Customer Count for the month / Customer Count for the entire report.
- **Report Totals:**
  - **Customer Count** - The total number of Customers whose birthdays are known that are included on the report.
  - **Percentage** - Set to 100%.

Customer Alt Key Summary Report

This report presents counts of Customers by Alternate Key Type. Customers are included in the counts on the report only if they are assigned Alternate Keys.

Selection Criteria

- **Alt Key Type Code** - The code identifying an alternate key used to identify a customer in a different system. All Alt Key Type Codes are selected by default. Optionally, select Search to work with the list of eligible Alt Key Type Codes, search based on Alt Key Type Code, or remove Alt Key Type Codes from the list selected for the report.
- **Time Period** - Optionally, select a time period to include Customers whose records were created during this period on the report rather than entering an Customer Sign Up Date From or Customer Sign Up Date To, even if their Alt Key Type Codes were not specified during this range of dates. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  > **Note:**
  >
  > If you select a Time Period, the Customer Sign Up Date From and Customer Sign Up Date To criteria are ignored.

- **Customer Sign Up Date From** - The first date to include on the report. Customer records created on or after this date, and on or before the Customer Sign Up Date To, are included in the totals, even if their Alt Key Type Codes were not specified during this range of dates. Defaults to the previous date (yesterday).

- **Customer Sign Up Date To -** The last date to include on the report. Defaults to the current date (today).
- **Row Limit -** Optionally, use this field to specify the maximum Alt Key Type Codes to include on the report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.
- **Alt Key Type Code -** The Alt Key Type Codes specified when generating the report, or set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Alt Key Typecode** - The key identifying a Customer in another system.
- **Customer Count -** The total number of Customer records created during the specified date range that have this type of Alt Key assigned.
- **Key Count** - The total number of Alt Keys that are assigned to Customers created during the specified date range. This number might be higher than the Customer Count if, for example, a single Customer was assigned multiple Alt Keys for the same external system.
- **Report Totals**:
  - **Customer Count -** The total number of Customer records created during the specified date range that are assigned to any type of Alt Key that are included on the report.
  - **Key Count -** The total number of Alt Keys assigned to Customers that are included in the totals on the report.

Customer Associate Assignment by Associate and Role Report

This report displays contact information for Customers associated to a particular Associate Role.

Selection Criteria

- **Associate** - The code identifying a Customer Associate. All Associates are selected by default. Optionally, select Search to work with the list of eligible Associates, search based on Associate Name, or remove Associates from the list selected for the report.
- **Associate Role** - The code and name identifying the role that an Associate performs for Customers. All Associate Roles are selected by default. Optionally, select Search to work with the list of eligible Roles, search based on Role Name, or remove Roles from the list selected for the report.
- **Customer ID** - The numeric ID uniquely identifying a customer. Optionally, enter a single Customer ID to generate the report for this Customer. Searching for a Customer here is not supported.

- **Limit Records** - Optionally, use this field to specify the maximum number of Customer Associate assignments to include on the report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization. Selected search criteria are not included in the report header area. Detail Information:
- **Associate** - The Name identifying an Associate.
- **Role** - The Role in which the Associate is assigned to the Customer. If the Associate is assigned through multiple Roles, the Customer is listed additional times for the Associate under the most recently assigned Role. For example, an Associate was first assigned to the Customer as a Sales Associate, and then assigned to the same Customer as Suit Buyer. The Associate is listed on the report with a Role of Suit Buyer, with the Customer listed twice under this Role.

For each Associate and Role:

- **Customer ID** - The unique numeric identifier for the Customer.
- **First Name** - The Customer's first name.
- **Last Name** - The Customer's last name.
- **Address** - The first street address line for the Customer's primary address. All address information is blank if there is no primary address identified for the Customer.
- **City** - The city for the Customer's primary address.
- **State** - The state for the Customer's primary address.
- **Country** - The country for the Customer's primary address.
- **Phone** - The Customer's primary phone number. Blank if no primary phone number is identified for the Customer.
- **Email** - The Customer's primary email address. Blank if no primary email address is identified for the Customer.

There are no totals on this report.

Customer Contact Email List Report

This report presents a listing of Customer names, addresses, and primary emails by Signup Location.

Selection Criteria

- **Sign Up Location** - The location where the Customer was enrolled. Optionally, select Search to work with the list of eligible Locations, search based on Location Name, or remove Locations from the list selected for the report.
- **Customer ID** - The numeric ID uniquely identifying a customer. Optionally, enter a single Customer ID to generate the report for this Customer. Searching for a Customer here is not supported.
- **Sign Up Time Period** - Optionally, select a time period to include Customers whose records were created during this period on the report rather than entering a Sign Up Date

From or Sign Up Date To. The dates when email addresses were created are not used as criteria. Set to None by default. Available time periods are:

- Yesterday
- Last Week
- Last Month
- Last Year
- Last 30 Days
- Last 60 Days
- Last 90 Days
- This Week
- This Month
- This Year

> **Note:**
>
> If you select a Time Period, the Sign Up Date From and Sign Up Date To criteria are ignored.

- **Sign Up Date From** - The first date to include on the report. Customer records created on or after this date, and on or before the Sign Up Date To, are included in the totals, even if their primary email addresses were not created or updated during this range of dates. Defaults to the previous date (yesterday).
- **Sign Up Date To** - The last date to include on the report. Defaults to the current date (today).
- **Limit Records** - Optionally, use this field to specify the maximum number of records to include on the report. There is a separate entry on the report for each mailing address for a customer, including deleted mailing addresses, if the customer has a primary email address.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Customer Sign Up Date** - The date range selected for inclusion on the report.

Any additional selection criteria are not included in the report header area.

The Report Contents detail information includes:

> **Note:**
>
> For each mailing address created for a Customer with a primary email address, including non-primary mailing addresses and deleted mailing addresses

- **Sign Up Location** - The Location where the Customer record was created.
- **Customer ID** - The unique numeric identifier for the Customer.
- **Customer Name** - The Customer's first and last name.
- **Address** - The Address Line 1 for the mailing address.
- **City and State** - The city and state for the Customer's address.
- **Postal Code** - The postal code for the Customer's address.
- **Email Address** - The Customer's current primary email address. The same primary email address is listed for each mailing address listed for the Customer.
- **Total Sales Amount** - The total extended amount of items and miscellaneous charges in the Customer's transaction history.

There are no totals on the report.

Customer Contact Phone List Report

This report presents a listing of Customer names, addresses, and phone numbers by Signup Location.

Selection Criteria

- **Customer ID** - The numeric ID uniquely identifying a customer. Optionally, enter a single Customer ID to generate the report for this Customer. Searching for a Customer here is not supported.
- **Sign Up Location** - The location where the Customer was enrolled. Optionally, select Search to work with the list of eligible Locations, search based on Location Name, or remove Locations from the list selected for the report.
- **Time Period** - Optionally, select a time period to include Customers whose records were created during this period on the report rather than entering a Customer Sign Up Date From or Customer Sign Up Date To. The dates when phone numbers were created are not used as criteria. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

> **Note:**
>
> If you select a Time Period, the Customer Sign Up Date From and Customer Sign Up Date To criteria are ignored.

- **Customer Sign Up Date From -** The first date to include on the report. Customer records created on or after this date, and on or before the Sign Up Date To, are included in the report. Defaults to the previous date (yesterday).
- **Customer Sign Up Date To -** The last date to include on the report. Defaults to the current date (today).
- **Limit Records -** Optionally, use this field to specify the maximum number of records to include on the report. There is a separate entry on the report for each mailing address for a customer, including deleted mailing addresses, regardless of whether the customer has a phone number. If the customer does have a phone number, there is a separate entry on the report for each mailing address/phone number combination. For example, if the customer has two mailing addresses and two phone numbers, there are four entries on the report for the customer.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range**- The date range selected for inclusion on the report.
- **Customer ID -** The customer ID selected for inclusion on the report; otherwise, set to ALL.
- **Sign Up Location** - The Sign Up Locations selected for inclusion on the report; otherwise, set to ALL.

The Report Contents detail information includes:

> **Note:**
>
> There is a separate entry on the report for each mailing address for a customer, including deleted mailing addresses, regardless of whether the customer has a phone number. If the customer does have a phone number, there is a separate entry on the report for each mailing address/phone number combination. For example, if the customer has two mailing addresses and two phone numbers, there are four entries on the report for the customer.

- **Sign Up Location** - The Location where the Customer record was created. For each Sign Up Location:
  - **Customer ID** - Name:

    —**Customer ID -** The unique numeric identifier for the Customer.

    —**Customer Name -** The Customer's first and last name.
  - **Address -** The Address Line 1 for the mailing address.

- **City and State** - The city and state for the Customer's address.
- **Postal Code** - The postal code for the Customer's address.
- **Phone** - The phone number for the Customer.
- **Total Sales Amount** - The total extended amount of items and miscellaneous charges in the Customer's transaction history.

There are no totals on the report.

Customer Purchase by Department by Year Report

This report presents a summary of Customer purchase activity by Department and year. Customers are included on the report only if they have purchase activity.

Selection Criteria

- **Customer ID** - The numeric ID uniquely identifying a customer. Optionally, enter a single Customer ID to generate the report for this Customer. Searching for a Customer here is not supported.
- **Department ID / Name** - The Department associated with items purchased by Customers. Optionally, select Search to work with the list of eligible Departments, search based on Department Name, or remove Departments from the list selected for the report.
- **Year** - The year when purchases occurred. Optionally, enter a single year to generate the report for purchases that occurred in this year. Searching for a year here is not supported.
- **Customer Sign Up Time Period** - Optionally, select a time period to include Customers whose records were created during this period on the report rather than entering a Customer Sign Up Date From or Customer Sign Up Date To. Customers are included on the report only if they have purchase activity. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  > **Note:**
  >
  > If you select a Time Period, the Customer Sign Up Date From and Customer Sign Up Date To criteria are ignored.

- **Customer Sign Up Date From** - The first date to include on the report. Customer records created on or after this date, and on or before the Sign Up Date To, are included in the totals. Only Customers with purchase activity are included on the report. Defaults to the previous date (yesterday).

- **Customer Sign Up Date To -** The last date to include on the report. Only Customers with purchase activity are included on the report. Defaults to the current date (today).
- **Limit Records -** Optionally, use this field to specify the maximum number of records to include on the report. There is a separate entry on the report for each Customer, Department, and year. For example, if a Customer has purchases in one Department in 2016 and 2017, and purchases in a different Department in 2017, there are three rows for the Customer on the report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range**- The date range selected for inclusion on the report.
- **Customer ID** - The customer ID specified for inclusion on the report; otherwise, set to ALL.
- **Department ID** - The Department IDs specified for inclusion on the report; otherwise, set to ALL.

The Report Contents detail information includes:

- **Customer** - The Customer ID and Name. For the Customer:
  - **Item Dept ID** - The unique numeric identifier for a Department.
  - **Department Description** - The description of the Department.
  - **Year** - The year when the purchase activity occurred for the Customer in the Department.
  - **Total Purchase Amount** - The total extended amount of items purchased in the Customer's transaction history.
- **Totals for Customer** - The Total Purchase Amount for the Customer included on the report.
- **Report Totals** - The Total Purchase Amount included on the report for all Customers.

Customer Status Summary Report

This report presents a summary of Customers grouped whether they are active or inactive, and identified or unidentified.

Selection Criteria

- **Active** - Indicates whether the Customer is Active, or has been flagged as Inactive. A customer might be inactive through a customer merge, dynamic target job processing, or customer deletes. Optionally, remove one of the Active Flag settings.
- **Anonymous Flag** - A Customer submitted by an integrating system is flagged as anonymous when there is no identifying information such as name, address, phone number, or email address. Optionally, remove one of the Anonymous Flag settings.
- **Time Period** - Optionally, select a time period to include Customers whose records were created during this period on the report rather than entering a Customer Sign Up Date

From or Customer Sign Up Date To. Customers are included on the report only if they have purchase activity. Set to None by default. Available time periods are:

- Yesterday
- Last Week
- Last Month
- Last Year
- Last 30 Days
- Last 60 Days
- Last 90 Days
- This Week
- This Month
- This Year

> **Note:**
>
> If you select a Time Period, the Customer Sign Up Date From and Customer Sign Up Date To criteria are ignored.

- **Customer Sign Up Date From** - The first date to include on the report. Customer records created on or after this date, and on or before the Sign Up Date To, are included in the totals. Only Customers with purchase activity are included on the report. Defaults to the previous date (yesterday).
- **Customer Sign Up Date To** - The last date to include on the report. Only Customers with purchase activity are included on the report. Defaults to the current date (today).
- **Limit Records** - Optionally, use this field to specify the maximum number of records to include on the report. There is a separate entry on the report for each combination of Active flag setting / Customer Status setting.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected for inclusion on the report.

The Report Contents detail information includes:

- **Active** - Set to Yes if the totals are for active Customers, or set to No if the totals are for inactive Customers. A Customer might be flagged as inactive through a customer merge, dynamic target job processing, or customer deletes.
- **Customer Status** - Possible settings:

  Identified - The Customer's identity is known.

  Unidentified - The Customer is anonymous. A Customer submitted by an integrating system is flagged as anonymous when there is no identifying information such as name, address, phone number, or email address.

- **Customer Count** - The total number of Customer records included on the report with the same Active flag and Status settings.
- **Percent** - The percentage of the Customers included in the totals on the report represented by the Customer Count for this Status and Active flag.
- **Status Totals:**
  - **Customer Count** - The total number of Customer records included on the report with the same Status.
  - **Percent** - The percentage of the Customers included in the totals on the report represented by the Customer Count for this Status.
- **Report Totals**
  - **Customer Count** - The total number of Customers included in the totals on the report.
  - **Percent** - Set to 100.00%.

Gender Summary Report

This report presents a summary of Customers grouped by gender.

Selection Criteria

- **Customer Sign Up Date From** - The first date to include on the report. Customer records created on or after this date, and on or before the Customer Sign Up Date To, are included in the totals.
- **Customer Sign Up Date To** - The last date to include on the report. Defaults to the current date (today).
- **Row Limit** - Optionally, use this field to specify the maximum number of gender categories to include on the report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected for inclusion on the report.

The Report Contents detail information includes:

- **Gender** - The gender identified for a Customer. N/A indicates that no gender was identified.
- **Gender Percentage** - The percentage of all Customer records, regardless of when they were created, that have been identified as this gender.
- **Customer Count** - The total number of Customer records identified as this gender created within the date range selected for the report, even if their gender was identified after this date range.
- **Report Totals** - The total number of Customers included in the report.

Location (Store) Capture Rate Report

This report presents a count of Customers, by Anonymous Flag, for each Sign Up Location. A Customer submitted by an integrating system is flagged as anonymous when there is no identifying information such as name, address, phone number, or email address.

Selection Criteria

- **Location ID / Name -** The location where the Customer was enrolled. Optionally, select Search to work with the list of eligible Locations, search based on Location Name, or remove Locations from the list selected for the report.
- **Customer Sign Up Time Period -** Optionally, select a time period to include Customers whose records were created during this period on the report rather than entering a Customer Sign Up Date From or Customer Sign Up Date To. Only Customers with purchase activity are included on the report. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  > **Note:**
  >
  > If you select a Time Period, the Customer Sign Up Date From and Customer Sign Up Date To criteria are ignored.

- **Customer Sign Up Date From -** The first date to include on the report. Customer records created on or after this date, and on or before the Customer Sign Up Date To, are included in the totals.
- **Customer Sign Up Date To -** The last date to include on the report. Defaults to the current date (today).
- **Row Limit -** Optionally, use this field to specify the maximum number of rows to include on the report. Each Location/Anonymous Status counts as a row.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range**- The date range selected for inclusion on the report.
- **Location ID** - The Location IDs selected for inclusion on the report; otherwise, set to ALL.

The Report Contents detail information includes:

- **Sign Up Store** - The numeric code identifying the Location that originated Customers.
- **Store Name** - The name describing the Location.
- **Anonymous Status** - Set to No for the total number of Customers created by the Location with identifying information, such as the Customers' names, addresses, phone numbers, and email addresses; otherwise, set to Yes for the total number of Customers created without this identifying information.
- **Customer Count** - The total number of Customers created at the Location with the indicated Anonymous Status during the Date Range selected for the report.
- **Percent** - The percentage of Customers included on the report that are represented by this Customer Count.
- **Report Totals**:
  - **Customer Count** - The total number of Customers included on the report.
  - **Percent** - Set to 100.00%.

Postal Code Summary Report

This report presents a count of Customers by Postal Code, filtered on only primary, active, home addresses.

Selection Criteria

- **Postal Code** - The Postal Code for a Customer's primary address. Optionally, select Search to work with the list of eligible Postal Codes, search based on Postal Code, or remove Postal Codes from the list selected for the report.
- **Address Effective Time Period** - Optionally, select a time period to include Customers whose primary addresses became effective during this period on the report rather than entering an Address Effective Date From or Address Effective Date To. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

> **Note:**
>
> If you select a Time Period, the Address Effective Date From and Address Effective Date To criteria are ignored.

- **Address Effective Date From -** The first date to include on the report. Primary Customer addresses created on or after this date, and on or before the Address Effective Date To, are included in the totals.
- **Address Effective Date To -** The last date to include on the report. Defaults to the current date (today).
- **Row Limit** - Optionally, use this field to specify the maximum number of Postal Codes to include on the report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Address Effective Date Range**- The date range selected for inclusion on the report.
- **Postal Code** - The Postal Codes selected for inclusion on the report; otherwise, set to ALL.

The Report Contents detail information includes:

- **Postal Code** - The Postal Code for a Customer's primary address. A blank Postal Code might be used to summarize anonymous Customer records.
- **Customer Count** - The number of Customers who were created or updated with a primary address in this Postal Code during the date range.
- **Percent** - The percentage of Customers included on the report who were created or updated with a primary address in this Postal Code.
- **Report Totals**:
  - **Customer Count** - The total number of Customers included on the report.
  - **Percent** - Set to 100.00%.

Social Network Summary Report

This report displays a count of Customers by Social Network, grouped by the Customer's Home Store.

Click **Apply** to generate the report. There are no selection criteria.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization. Detail Information:
- **Anonymous Flag** - The totals are separate based on whether the Anonymous Flag for the Customer is set to Yes or No. A Customer submitted by an integrating system is flagged as

anonymous when there is no identifying information such as name, address, phone number, or email address.

- **Home Store** - The numeric code identifying the Location where the Customer record was created.
- **Social Media** - The Social Media type, such as FACEBOOK, TWITTER, or LINKEDIN, associated with the Customer through a message from an integrating system.
- **Customer Count** - The total number of Customers from this Location that are associated with this Social Media type. For example, the report can include a Customer Count of the total number of Customers originating from a specific store Location, associated with TWITTER, that have the Anonymous flag set to No.
- **Totals for Anonymous Flag** - The total number of Customers from all Locations, associated with all Social Media types, with the same Anonymous Flag setting.

State Summary Report

This report presents a count of active primary address records grouped by state.

Selection Criteria

- **Time Period** - Optionally, select a time period to include Customers whose primary addresses became effective during this period on the report rather than entering a Customer Address Date From or Customer Address Date To. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  > **Note:**
  >
  > If you select a Time Period, the Address Effective Date From and Address Effective Date To criteria are ignored.

- **Customer Address Date From** - The first date to include on the report. Primary Customer addresses created on or after this date, and on or before the Address Effective Date To, are included in the totals.
- **Customer Address Date To** - The last date to include on the report. Defaults to the current date (today).

- **Row Limit** - Optionally, use this field to specify the maximum number of states to include on the report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range**- The date range selected for inclusion on the report.

The Report Contents detail information includes:

- **State** - The U.S. state for a Customer's primary address.
- **Customer Count** - The number of Customers who were created or updated with a primary address in this state during the date range.
- **Percent** - The percentage of Customers included on the report who were created or updated with a primary address in this state.
- **Report Totals**:
  - **Customer Count** - The total number of Customers included on the report.
  - **Percent** - Set to 100.00%.

Summary Detail Report

This report presents totals and percentages of types of addresses, email addresses, and phone numbers for Customers who signed up within a specified date range.

Selection Criteria

- **Summary Type** - The type of information to summarize: Address, E-mail, or Telephone. Optionally, remove one or more summary types.
- **Valid Flag** - Indicates whether the mailing address, email address, or telephone number was flagged as valid or invalid. Optionally, remove one of the Valid Flag settings.
- **Address Type** - The address types, such as Home, Business, Not Defined, or Work. Applies to mailing address, email, and telephone totals included on the report. Optionally, remove one or more address types. Note that all address types used for your organization might not be included in this list.
- **Customer Signup Time Period** - Optionally, select a time period to include Customers whose records were created during this period on the report rather than entering a Customer Signup Date From or Customer Signup Date To. Only Customers with active mailing addresses, email addresses, or telephone numbers are included in the totals on the report. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days

  - Last 90 Days
  - This Week
  - This Month
  - This Year

> **Note:**
>
> If you select a Time Period, the Customer Signup Date From and Customer Signup Date To criteria are ignored.

- **Customer Signup Date From** - The first date to include on the report. Customer records created on or after this date, and on or before the Signup Date To, are included in the totals. Only Customers with mailing addresses, email addresses, or telephone numbers are included in the report totals. Defaults to the previous date (yesterday).
- **Customer Signup Date To** - The last date to include on the report. Only Customers with mailing addresses, email addresses, or telephone numbers are included in the report totals. Defaults to the current date (today).
- **Limit Records** - Optionally, use this field to specify the maximum number of rows to include on the report. There is a separate row on the report for each combination of mailing address, email, or telephone type and valid flag setting.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected for inclusion on the report.
- **Summary Type** - The summary types selected for inclusion on the report; otherwise, set to ALL.
- **Valid Flag** - The Valid Flag setting selected for inclusion on the report; otherwise, set to ALL.
- **Type** - The mailing address, email, and telephone Types selected for inclusion on the report; otherwise, set to ALL.

The Report Contents detail information includes:

For each Summary Type (Address, Email, and Telephone):

- **Type** - The type of record, such as Home, Business, or Vacation.
  - **Valid** - Set to Yes if the Customer Count includes valid address, email, or telephone records; otherwise, set to No.
  - **Percent** - The percentage of the Summary Type represented by the Customer Count. For example, if the Summary Type is Address, the Total for the Summary Type is 100, and the Customer Count for valid Work addresses is 20, the Percent is 20%.
  - **Customer Count** - The total number of current primary mailing addresses, email addresses, or telephone numbers of this Type and Valid setting.

- Totals for Summary Type - The total number of current, primary mailing addresses, email addresses, or telephone numbers included on the report.

Item Management Reports

The Item Management Reports include:

- Item Attribute Summary Report

Item Attribute Summary Report

This report provides a count of items that are associated with each given Item Attribute and Attribute value.

Selection Criteria

- **Attribute** - An Attribute assigned to one or more items. Optionally, select Search to work with the list of eligible Attributes, search based on Attribute, or select all Attributes for the report.
- **Value** - An Attribute Value setting. Optionally, enter a single Value to generate the report for this Attribute Value. Searching for a Value here is not supported.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.

The Report Contents detail information includes:

- **Attribute Code** - The ID and Name for an Item Attribute. For each Attribute Code:
  - **Attribute Value** - A Value assigned to one or more items for an Attribute.
  - **Item Count** - The total number of items assigned this Attribute Value.
  - **Total Item Count** - The total number of items assigned a Value for this Attribute.

Location Operations Reports

The Location Operations Reports include:

- Capture Quality Summary Report
- Customer by Home Location Report
- Shoppers by Location Report
- Signup Location (Store) by Postal Code Report
- Signup Location by State Report
- Signup Location Report
- Signup Location Daily Trend Report

Capture Quality Summary Report

This report presents the percentage of validated Customer data, organized by Operator ID, within each Location.

This report includes Customer records created by receiving transactions through an integration. Customer records created through Customer Engagement Cloud Services windows are not included in these totals.

Selection Criteria

- **Location** - A Location in your organization. Optionally, select Search to work with the list of eligible Locations, search based on Location, or select all Locations for the report.
- **Operator ID** - A unique number identifying an employee. Optionally, enter a single Operator ID to generate the report for this Operator. Searching for an Operator here is not supported.
- **Business Date** - Optionally, select a time period to include Customers created during this period on the report rather than entering a Business Start Date or Business End Date. Only Customers created by receiving transactions through an integration are included in the totals on the report. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  > **Note:**
  >
  > If you select a Time Period, the Business Start Date and Business End Date criteria are ignored.

- **Business Start Date** - The first date to include on the report. Customer records created on or after this date, and on or before the Business End Date, are included in the totals. Defaults to the previous date (yesterday).
- **Business End Date** - The last date to include on the report. Defaults to the current date (today).

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.

The Report Contents detail information includes:

- **Location** - The ID and Name for a Location. For each Location:
  - **Operator ID** - A code identifying an employee.
  - **Total Trans** - The total number of Transactions submitted by the Operator and Location during the date range.
  - **Address Valid** - The total number of valid addresses for the Total Trans.
  - **Address Invalid** - The total number of invalid addresses for the Total Trans.
  - **Address None** - The total number of transactions submitted without addresses.
  - **Address % Valid** - The Address Valid total / the Total Trans, formatted as a percentage.
  - **Phone Valid** - The total number of valid phone numbers for the Total Trans.
  - **Phone Invalid** - The total number of invalid phone numbers for the Total Trans.
  - **Phone None** - The total number of transactions submitted without phone numbers.
  - **Phone % Valid** - The Phone Valid total / the Total Trans, formatted as a percentage.
  - **Email Valid** - The total number of valid email addresses for the Total Trans.
  - **Email Invalid** - The total number of invalid email addresses for the Total Trans.
  - **Email None** - The total number of transactions submitted without email addresses.
  - **Email % Valid** - The Email Valid / the Total Trans, formatted as a percentage.
- **Location Totals**:
  - **Total Trans** - The total number of Transactions submitted for the Location during the date range.
  - **Address Valid** - The total number of valid addresses for the Total Trans.
  - **Address Invalid** - The total number of invalid addresses for the Total Trans.
  - **Address None** - The total number of transactions submitted without addresses.
  - **Address % Valid** - The Address Valid total / the Total Trans, formatted as a percentage.
  - **Phone Valid** - The total number of valid phone numbers for the Total Trans.
  - **Phone Invalid** - The total number of invalid phone numbers for the Total Trans.
  - **Phone None** - The total number of transactions submitted without phone numbers.
  - **Phone % Valid** - The Phone Valid total / the Total Trans, formatted as a percentage.
  - **Email Valid** - The total number of valid email addresses for the Total Trans.
  - **Email Invalid** - The total number of invalid email addresses for the Total Trans.
  - **Email None** - The total number of transactions submitted without email addresses.
  - **Email % Valid** - The Email Valid / the Total Trans, formatted as a percentage.
- **Report Totals**:
  - **Total Trans** - The total number of Transactions included on the report.
  - **Address Valid** - The total number of valid addresses for the Total Trans.

- **Address Invalid** - The total number of invalid addresses for the Total Trans.
- **Address None** - The total number of transactions submitted without addresses.
- **Address % Valid** - The Address Valid total / the Total Trans, formatted as a percentage.
- **Phone Valid** - The total number of valid phone numbers for the Total Trans.
- **Phone Invalid** - The total number of invalid phone numbers for the Total Trans.
- **Phone None** - The total number of transactions submitted without phone numbers.
- **Phone % Valid** - The Phone Valid total / the Total Trans, formatted as a percentage.
- **Email Valid** - The total number of valid email addresses for the Total Trans.
- **Email Invalid** - The total number of invalid email addresses for the Total Trans.
- **Email None** - The total number of transactions submitted without email addresses.
- **Email % Valid** - The Email Valid / the Total Trans, formatted as a percentage.

Customer by Home Location Report

This report presents a count of Customers for each Home Location.

This report includes Customer records created by transactions received through an integration. Customer records created through Customer Engagement Cloud Services windows are not included in these totals.

Selection Criteria

- **Location** - A Location in your organization. Optionally, select Search to work with the list of eligible Locations, search based on Location, or select all Locations for the report.
- **Signup Date Period** - Optionally, select a time period to include Customers created during this period on the report rather than entering a Signup Start Date or Signup End Date. Only Customers created by receiving transactions through an integration are included in the totals on the report. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

> **Note:**
>
> If you select a Time Period, the Signup Start Date and Signup End Date criteria are ignored.

- **Signup Start Date** - The first date to include on the report. Customer records created on or after this date, and on or before the Signup End Date, are included in the totals. Defaults to the previous date (yesterday).
- **Signup End Date** - The last date to include on the report. Defaults to the current date (today).

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Customer Signup Date Range** - The date range selected when generating the report.

The Report Contents detail information includes:

- **Home Location** - The unique numeric identifier for the Location.
- **Location Name** - The Name describing the Location.
- **Customer Count** - The total number of Customers created for the Location through transactions receiving during the date range.
- **Report Totals** - The total number of Customers included on the report.

Shoppers by Location Report

This report presents Customer count and purchase statistics for each Location.

This report includes Customer records created by transactions received through an integration. Customer records created through Customer Engagement Cloud Services windows are not included in these totals.

Selection Criteria

- **Location** - A Location in your organization. Optionally, select Search to work with the list of eligible Locations, search based on Location, or select all Locations for the report.
- **Business Date** - Optionally, select a time period to include Customers created during this period on the report rather than entering a Business Start Date or Business End Date. Only Customers created during this time period on transactions received through an integration are included in the totals on the report. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days

  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

> **Note:**
>
> If you select a Time Period, the Business Start Date and Business End Date criteria are ignored.

- **Business Start Date -** The first date to include on the report. Customer records created on or after this date, and on or before the Business End Date, are included in the totals. Defaults to the previous date (yesterday).
- **Business End Date** - The last date to include on the report. Defaults to the current date (today).

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization -** The code identifying your organization.
- **Business Date -** The date range selected when generating the report.

The Report Contents detail information includes:

- **Location** - The ID and Name for a Location.
- **Location Name -** The Name describing the Location.
- **Customer Count** - The total number of Customers created for the Location through transactions received during the date range.
- **Total Spent** - The total extended amount of items and miscellaneous charges for transactions.
- **Number of Transactions -** The total number of separate transactions.
- **Average Purchase** - The Total Spent / the Number of Transactions, presented as a percentage.
- **Percent of Total** - The Total Spent for the Location / the Total Spent for the report, presented as a percentage.
- **Report Totals**:
  - **Customer Count** - The total number of Customers created for the Locations and date range included on the report.
  - **Total Spent** - The total extended amount of items and miscellaneous charges for transactions included on the report.
  - **Number of Transactions -** The total number of separate transactions included on the report.

- **Average Purchase** - The Total Spent for the report / the Number of Transactions on the report, presented as a percentage.
- **Percent of Total** - Set to 100.00%.

Signup Location (Store) by Postal Code Report

This report presents the number of Customers, by date, who signed up at Locations, organized by Postal Code or Zip Code.

If you change a Customer's Signup Location, the Customer is included in the totals for the new Signup Location rather than the original Location, but included in the Date Range for the Customer's original signup date.

Selection Criteria

- **Location ID / Name** - A Location in your organization. Optionally, select Search to work with the list of eligible Locations, search based on Location, or select all Locations for the report.
- **Postal Code** - A postal or Zip code for a Location. Optionally, select Search to work with the list of eligible postal codes, search based on postal code, or select all postal codes for the report.
- **Signup Time Period** - Optionally, select a time period to include Customers whose records were created during this period on the report rather than entering a Signup Start Date or Signup End Date. Only Customers with active primary addresses are included in the totals on the report. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  > **Note:**
  >
  > If you select a Signup Time Period, the Signup Start Date and Signup End Date criteria are ignored.

- **Signup Start Date** - The first date to include on the report. Customer records created on or after this date, and on or before the Signup End Date, are included in the totals. Defaults to the previous date (yesterday).
- **Signup End Date** - The last date to include on the report. Defaults to the current date (today).

- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. There is a separate row on the report for each Store and Signup Date.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

> **Note:**
>
> The title listed on the report is Signup Store by Postal Code.

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected for inclusion on the report.
- **Location ID** - The Locations selected for inclusion on the report; otherwise, set to ALL.
- **Postal Code** - The Postal or Zip Codes selected for inclusion on the report; otherwise, set to ALL.

The Report Contents detail information includes:

- **Store Name** - The Location ID and the Name of the Location. The first Store Name listed might be blank if there were Customers created without assignment to a Location.
- **Postal Code** - The Postal Code or Zip Code for the Location. Blank if no Postal or ZIP Code is specified for the Location.
- **Signup Date** - The date when one or more Customer records were created with this store specified as the Signup Location.
- **Customer Count** - The total number of Customers created for the Store Location on this Signup Date.
- **Totals for Location** - The total number of Customers created for the Store Location during the date range included on the report.
- **Report Totals** - The total number of Customers created for the Store Locations and date range included on the report.

Signup Location by State Report

This report presents the number of Customers, by the state or province of the Customers' primary addresses, who signed up at the Location.

If you change a Customer's Signup Location, the Customer is included in the totals for the new Signup Location rather than the original Location, but included in the Date Range for the Customer's original signup date.

Selection Criteria

- **Location ID / Name** - A Location in your organization. Optionally, select Search to work with the list of eligible Locations, search based on Location, or select all Locations for the report.

- **State** - The state or province for a Customer's primary address. Optionally, select Search to work with the list of eligible states or provinces, search based on state or province, or select all states or provinces for the report.
- **Signup Date Period** - Optionally, select a time period to include Customers whose records were originally created during this period on the report rather than entering a Signup Start Date or Signup End Date.

  Only Customers with active primary addresses are included in the totals on the report, regardless of whether the active primary addresses were defined during the date range. For example, a Customer signs up last month, and a primary address for the Customer is identified this month. When the report is run for last month, the state for the Customer's primary address is included in the report totals. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  > **Note:**
  >
  > If you select a Signup Date Period, the Signup Start Date and Signup End Date criteria are ignored.

- **Signup Start Date** - The first date to include on the report. Customer records created on or after this date, and on or before the Signup End Date, are included in the totals. Defaults to the previous date (yesterday).
- **Signup End Date** - The last date to include on the report. Defaults to the current date (today).
- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. There is a separate row on the report for each Store and State.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Sign Up Date Range** - The date range selected for inclusion on the report.
- **Location ID** - The Locations selected for inclusion on the report; otherwise, set to ALL.
- **State** - The state or provinces selected for inclusion on the report; otherwise, set to ALL.

The Report Contents detail information includes:

- **Sign Up Store** - The unique numeric identifier for the originating Store Location. The first Sign Up Store listed might be blank if there were Customers created without assignment to a Location.
- **Store Name** - The name identifying the originating Store Location.
- **State** - The state or province for one or more Customers' current primary addresses. A blank State might indicate that a Customer's primary address was created without a state or province.
- **Customer Count** - The total number of Customers originating at this Store Location during the date range with active primary addresses in this State.
- **Report Totals** - The total number of Customers created for the Store Locations during the date range included on the report that have active primary addresses.

Signup Location Report

This report presents a list of Customer totals by Signup Location.

If you change a Customer's Signup Location, the Customer is included in the totals for the new Signup Location rather than the original Location, but included in the Date Range for the Customer's original signup date.

Selection Criteria

- **Location ID / Name** - A Location in your organization. Optionally, select Search to work with the list of eligible Locations, search based on Location, or select all Locations for the report.
- **Signup Date Period** - Optionally, select a time period to include Customers whose records were originally created during this period on the report rather than entering a Signup Start Date or Signup End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  > **Note:**
  >
  > If you select a Signup Date Period, the Signup Start Date and Signup End Date criteria are ignored.

- **Signup Start Date** - The first date to include on the report. Customer records created on or after this date, and on or before the Signup End Date, are included in the totals. Defaults to the previous date (yesterday).
- **Signup End Date** - The last date to include on the report. Defaults to the current date (today).
- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. There is a separate row on the report for each Signup Location.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Signup Date Period** - The date range selected for inclusion on the report.
- **Location** - The Locations selected for inclusion on the report; otherwise, set to ALL.

The Report Contents detail information includes:

- **Signup Location** - The ID and Name identifying an originating Store Location.
- **Customer Count** - The total number of Customers created during the date range and assigned to this Signup Location.
- **Signup Percentage** - The Customer Count for the Signup Location / the Customer Count for the entire report, presented as a percentage.

The Report Totals includes:

- **Customer Count** - The total number of Customers created during the date range included on the report.
- **Signup Percentage** - Set to 100.00%.

Signup Location Daily Trend Report

This report presents Customer counts by signup date and Location, and includes a chart depicting the signup trend over the selected date range.

> **Note:**
>
> The chart on this report is useful only if you restrict the selection criteria to a single Location, so you can identify the total signups for these dates for the Location. Otherwise, it might be difficult to determine the totals for the same date but a different Location.

If you change a Customer's Signup Location, the Customer is included in the totals for the new Signup Location rather than the original Location, but included in the Date Range for the Customer's original signup date.

Selection Criteria

- **Location ID / Name** - A Location in your organization. Optionally, select Search to work with the list of eligible Locations, search based on Location, or select all Locations for the report.
- **Signup Time Period** - Optionally, select a time period to include Customers whose records were originally created during this period on the report rather than entering a Signup Start Date or Signup End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  > **Note:**
  >
  > If you select a Signup Time Period, the Signup Start Date and Signup End Date criteria are ignored.

- **Signup Start Date** - The first date to include on the report. Customer records created on or after this date, and on or before the Signup End Date, are included in the totals. Defaults to the previous date (yesterday).
- **Signup End Date** - The last date to include on the report. Defaults to the current date (today).
- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. There is a separate row on the report for each Signup Location and Signup Date.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

> **Note:**
>
> The title listed on the report is Signup Store Daily Trend.

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected for inclusion on the report.
- **Location** - The Locations selected for inclusion on the report; otherwise, set to ALL.

- **Number of Customers** - Signup Store Daily Trend: Displays the total count of new Customers for each date and Location.

Figure 13-13 Signup Store Daily Trend Report - Number of Customers

The Report Contents detail information includes:

- **Signup Location -** The Location ID and Name for a Signup Location for one or more Customers. For each Signup Location:
- **Signup Date -** The date when one or more Customer records were created.
- **Customer Count** - The total number of Customers created on that date and assigned to the Signup Location.
- **Totals for Location -** The total number of Customers created during the date range and assigned to the Signup Location.
- **Report Totals -** The total number of Customers created during the date range and included on the report.

Loyalty Management Reports

The Loyalty Management Reports include:

- Loyalty Account Detail Report
- Loyalty Account Activity Errors Report
- Loyalty Account Level Summary Report
- Loyalty Activity Type Summary Report
- Loyalty Activity Type Trend Report
- Loyalty Issue Rule Impact Report
- Loyalty Rules Results Summary Report
- Loyalty Rules Results Trend Report
- Loyalty Account Balance Summary Report
- Loyalty Account Last Use Summary Report
- Loyalty Account Life Cycle Summary Report

- Loyalty Account Activity Summary Award Report
- Loyalty Account Activity Summary Issue Report
- Loyalty Program Level Summary Report

Loyalty Account Detail Report

This report presents details of the activities performed for individual Loyalty Accounts.

Selection Criteria

- **Program ID / Name** - The ID and Name identifying a Loyalty Program. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program ID, or remove Programs from the list selected for the report.

  After you make a Program ID / Name selection, clear the Program Level ID that is automatically selected as a result and reset Program Level IDs as needed.
- **Program Level ID / Name** - The ID and Name identifying a Level for a Loyalty Program. Optionally, select Search to work with the list of eligible Levels, search based on Level ID and Name, or remove Levels from the list selected for the report.
- **Account ID** - Optionally, enter an Account ID to include a specific Loyalty Account on the report based on Account ID. Searching for an Account ID here is not supported.
- **Serial Number** - Optionally, enter a card's Serial Number to include a specific Loyalty Account on the report based on Serial Number. Searching for a Serial Number here is not supported.
- **Void Flag** - Optionally, select Yes or No to select Loyalty Account activity based on whether the activity was voided.
- **Activity Time Period** - Optionally, select a time period to include activities that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  > **Note:**
  >
  > If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- **Activity Start Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **Activity End Date** - The last date to include on the report. Defaults to the current date (today).
- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of activity records for the entire report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.

The Report Contents detail information includes:

- **Account ID** - The unique identifier for the account associated with the card.
- **Serial Number** - The unique serial number for the card.
- **Loyalty Program** - The Loyalty Program for the card.

  For each activity included for an Account ID, Serial Number, and Loyalty Program:

  - **Activity ID** - A unique identifier for the activity.
  - **Activity Type** - The type of activity performed. Possible types include:

    —**Account Merge**

    —**Activate Account**

    —**Change Level**

    —**Deactivate**

    —**Issue Award**

    —**Issue Points**

    —**Point Recovery**
  - **Activity Date** - The date when the activity took place.
  - **Void** - Set to Yes if the activity has been voided.
  - **Escrow** Xfer - Set to Yes if the points are escrowed.
  - **Escrow** Xfer Date - The date, if any, when escrowed points are converted to earned points.
  - **Prog Lvl ID** - The unique numeric identifier for the Loyalty Program level.
  - **Prog Lvl Name** - The name describing the Loyalty Program level.
  - **New Prog Lvl I**D - The unique numeric identifier of the new Loyalty Program level assigned, if any.
  - **Loyalty Rule ID** - The unique numeric identifier of the Loyalty rule applied.
  - **Loyalty Rule Name** - The name describing the Loyalty rule.
  - **Business Date** - The business date of the activity.

  - **Location ID** - The unique numeric identifier of the Location where the activity took place.
  - **Sequence ID** - The unique numeric sequence identifier, if any, for the activity.
  - **Comments** - The comments, if any, describing the activity.
  - **Error Codes** - The error codes, if any, associated with the activity.
  - **Register ID** - The unique numeric identifier of the register, if any, where the transaction took place.
  - **Create Date** - The date when the activity record was created.
  - **Create User** - The user ID that created the activity record.
  - **Loyalty Points** - The points earned, awarded, or subtracted through the activity.
- **Totals for Account** - The total net points earned, awarded, or subtracted for the account during the date range included on the report.
- **Report Totals** - The total net points earned, awarded, or subtracted for all activity included on the report.

Loyalty Account Activity Errors Report

This report presents details of errors for Loyalty Accounts by Program ID.

Selection Criteria

- **Program ID / Name** - The ID and Name identifying a Loyalty Program. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program ID, or remove Programs from the list selected for the report.
- **Serial Number** - Optionally, enter a card's Serial Number to include a specific Loyalty Account on the report based on Serial Number. Searching for a Serial Number here is not supported.
- **Error Code** - The code identifying the type of error that occurred. All error codes are selected by default. Optionally, select Search to work with the list of eligible error codes, search based on error code, or remove error codes from the list selected for the report.
- **Activity Time Period** - Optionally, select a time period to include errors that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

> **Note:**
>
> If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- **Activity Start Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **Activity End Date** - The last date to include on the report. Defaults to the current date (today).

  Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of errors for the entire report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.
- **Error Code** - The error codes selected for inclusion on the report; otherwise, set to ALL.
- **Program ID** - The program IDs selected for inclusion on the report; otherwise, set to ALL.
- **Serial Number** - The serial numbers selected for inclusion on the report; otherwise, set to N/A.

The Report Contents detail information includes:

- **Program**- The ID and Name of the Loyalty Program.
- **Acct ID** - The unique identifier for the account associated with the card.
- **Program Level ID** - Name - The ID and Name of the Loyalty Program level.
- **Serial Number** - The unique serial number for the card.
- **Activity ID** - Type - The unique numeric identifier for the type of activity, and the name of the type. Examples of activity types are Activate or Issue Points.
- **Activity Date** - The date when the activity took place.
- **Business Date** - The business date when the activity took place.
- **Create Date** - The date when the activity record was created.
- **Void Flag** - Set to Yes if the transaction was voided.
- **Error Code** - The description of the error that occurred.
- **Comments** - Any comments entered for the activity.
- **Create User** - The user ID that created the activity producing the error.
- **Trans. ID** - The unique numeric identifier for the transaction.
- **Loc. ID** - The unique identifier for the Location where the activity took place.
- **Number of Points** - The number of points associated with the activity.
- **Totals for Account** - The total net points earned, awarded, or subtracted for activities in error for the account during the date range included on the report.

- **Report Totals** - The total net points earned, awarded, or subtracted for activities in error included on the report.

Loyalty Account Level Summary Report

This report presents account level summaries for Loyalty accounts by Program ID.

Selection Criteria

- **Program ID / Name** - The ID and Name identifying a Loyalty Program. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program ID, or remove Programs from the list selected for the report.

  After you make a Program ID / Name selection, clear the Program Level ID that is automatically selected as a result and reset Program Level IDs as needed.
- **Program Level ID** - The ID and Name identifying a Level for a Loyalty Program. Optionally, select Search to work with the list of eligible Levels, search based on Level ID and Name, or remove Levels from the list selected for the report.
- **Account** - Optionally, enter an account number to include a specific Loyalty account on the report. Searching for an account here is not supported.
- **Serial Number** - Optionally, enter a card's Serial Number to include a specific Loyalty Account on the report based on Serial Number. Searching for a Serial Number here is not supported.
- **Activity Time Period** - Optionally, select a time period to include totals for cards created during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  > **Note:**
  >
  > If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.
- **Activity Start Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **Activity End Date** - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of accounts for the entire report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.

The Report Contents detail information includes:

- **Program ID** - The unique numeric identifier for the Program.
- **Program Name** - The Name describing the Program. For each account included on the report:
- **Program Level** - The unique numeric identifier for the current Program level for the account.
- **Program Level Name** - The Name describing the current Program level for the account.
- **Account ID** - The unique numeric identifier for the account.
- **Serial Number** - The unique serial number for the account.
- **Earned Points Balance** - The current total net earned points balance for the account.
- **Bonus Points Balance** - The current total net bonus points balance for the account.
- **Escrow Points Balance** - The current total net escrow points balance for the account.
- **Program Totals**:
  - **Earned Points Balance** - The current total net earned points balance for the accounts listed on the report for the Program.
  - **Bonus Points Balance** - The current total net bonus points balance for the accounts listed on the report for the Program.
  - **Escrow Points Balance** - The current total net escrow points balance for the accounts listed on the report for the Program.
- **Report Totals**:
  - **Earned Points Balance** - The current total net earned points balance for the accounts listed on the report.
  - **Bonus Points Balance** - The current total net bonus points balance for the accounts listed on the report.
  - **Escrow Points Balance** - The current total net escrow points balance for the accounts listed on the report.

Loyalty Activity Type Summary Report

This report presents summary information on accounts and Loyalty activity types associated with Program Levels on Loyalty Programs.

Selection Criteria

- **Program ID / Name** - The ID and Name identifying a Loyalty Program. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program ID, or remove Programs from the list selected for the report.

  After you make a Program ID / Name selection, clear the Program Level ID that is automatically selected as a result and reset Program Level IDs as needed.
- **Program Level ID / Name** - The ID and Name identifying a Level for a Loyalty Program. Optionally, select Search to work with the list of eligible Levels, search based on Level ID and Name, or remove Levels from the list selected for the report.
- **Activity Type** - The type of activity performed for a Loyalty account. Optionally, select Search to work with the list of eligible types, search based on type, or remove types from the list selected for the report. Possible Activity Types are:
  - Account Merge
  - Activate Card
  - Award
  - Balance Transfer
  - Change Earn Date
  - Change Level
  - Deactivate Card
  - Earn Points
  - Expire Points - Inquiry
  - Point Recovery
  - Reset Expiration Date - Return
  - Sustain Extension
  - Void Transaction
- **Activity Time Period** - Optionally, select a time period to include totals for activities performed during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

> **Note:**
>
> If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- **Activity Start Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **Activity End Date** - The last date to include on the report. Defaults to the current date (today).
- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of activities performed across all Programs and Levels included on the report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.

The Report Contents detail information includes:

- **Program ID** - The unique numeric identifier for the Program.
- **Program Name** - The Name describing the Program.
- For each activity type and Level included on the report:
  - **Program Level ID** - The unique numeric identifier for the Program Level.
  - **Program Level Name** - The Name describing the Program Level.
- **Activity Type** - The type of activity performed. Possible activity types include:
  - Account Merge
  - Activate Card
  - Award
  - Balance Transfer
  - Change Earn Date
  - Deactivate Card
  - Earn Points
  - Expire Points
  - Inquiry
  - Issue
  - Point Recovery
  - Reset Expiration Date
  - Return
  - Sustain Extension

  - Void Transaction
- **Number of Accounts** - The total number of accounts that had this type of activity for the Program Level during the date range.
- **Number of Points** - The total number of points for the activity type. Can be a negative number, such as for an award, or can be 0.00, such as for an inquiry.
- **Average Points** - The Number of Points / the Number of Accounts.
- **Program Totals**:
  - **Number of Accounts** - The total number of accounts that had this type of activity for all Program Levels
  - **Number of Points** - The total number of points for all included activities for the Program.
  - **Average Points** - The Number of Points / the Number of Accounts.
- **Report Totals**:
  - **Number of Accounts** - The total number of accounts included on the report.
  - **Number of Points** - The total number of points for all activities included on the report.
  - **Average Points** - The Number of Points / the Number of Accounts.

Loyalty Activity Type Trend Report

This report presents summary information on Accounts by Activity Type by business date, organized by Loyalty Program Level.

The report begins with three charts summarizing loyalty activity. One chart displays total activity counts for each date in the selected time period, another displays the number of points involved in the activities for each date, and the third displays average points for each date.

> **Note:**
>
> The charts on this report are useful only if you restrict the selection criteria to a single Program ID, Program Level ID, and Activity Type, so you can identify the totals for the type of activity. Otherwise, it would be difficult to determine the different totals for the same date but a different Program ID, Program Level ID, and Activity Type.

Selection Criteria

- **Program ID / Name** - The ID and Name identifying a Loyalty Program for a Card Definition. All Loyalty Programs are selected by default. Optionally, select Search to work with the list of eligible Loyalty Programs, search based on Loyalty Program Name, or remove Loyalty Programs from the list selected for the report.

  After you make a Program ID / Name selection, clear the Program Level ID that is automatically selected as a result and reset Program Level IDs as needed.
- **Program Level ID / Name** - The ID and Name identifying a Level for a Loyalty Program. Optionally, select Search to work with the list of eligible Levels, search based on Level ID and Name, or remove Levels from the list selected for the report.
- **Activity Type** - Codes identifying types of activity for a Loyalty account. All activity types are selected by default. Optionally, select Search to work with the list of eligible Activity

Types, search based on Activity Type, or remove Activity Types from the list selected for the report. Possible Activity Types are:

  – Account Merge
  – Activate Card
  – Award
  – Balance Transfer
  – Change Earn Date
  – Change Level
  – Deactivate Card
  – Earn Points
  – Expire Points - Inquiry
  – Point Recovery
  – Reset Expiration Date - Return
  – Sustain Extension
  – Void Transaction

- **Activity Time Period** - Optionally, select a time period to include activities that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:
  – Yesterday
  – Last Week
  – Last Month
  – Last Year
  – Last 30 Days
  – Last 60 Days
  – Last 90 Days
  – This Week
  – This Month
  – This Year

> **Note:**
>
> If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- **Activity Start Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **Activity End Date** - The last date to include on the report. Defaults to the current date (today).
- **Row Limit -** Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of records by Business Date, Program Level, Activity Type, and Activity Date for the entire report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

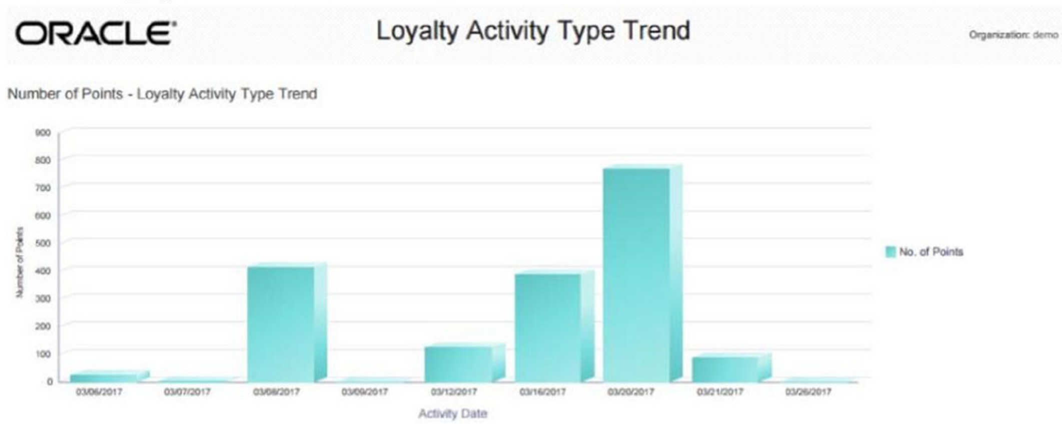
- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.
- **Program ID** - The numeric ID for a Loyalty Program selected when generating the report. Set to ALL if there was no restriction.
- **Program Level** - The numeric ID for a Loyalty Level selected when generating the report. Set to ALL if there was no restriction.
- **Activity Type** - The Activity Types selected when generating the report. Set to ALL if there was no restriction.
- **Number of Accounts Chart** - Displays the total number of Loyalty accounts for which there was activity for each date.

Figure 13-14 Loyalty Activity Type Trend Report - Number of Accounts Chart

- **Number of Points Chart -** Displays the total number of points involved in activities for each date.

  Negative numbers are presented as absolute values. For example, if the Activity Type is Award, and the amount of Points deducted is 500, the number of points depicted on this graph is 500 rather than -500.

Figure 13-15 Loyalty Activity Type Trend Report - Number of Points Chart



- **Average Points Chart** - Displays the average number of points involved in activities for each date.

  Negative numbers are presented as absolute values. For example, if the Activity Type is Award, and the average amount of Points deducted is 100, the average amount of points depicted on this graph is 100 rather than -100.

Figure 13-16 Loyalty Activity Type Trend Report - Average Points Chart

The Report Contents detail information includes:

- **Program** - The unique numeric identifier for the Loyalty Program, and the Name describing the Loyalty Program.

For each activity type and Level included on the report:

- **Program Level ID** - Name - The unique numeric identifier for the Program Level, and the Name describing the Program Level.
- **Activity Type** - The type of activity performed. Possible activity types include:
  - Account Merge
  - Activate Card
  - Award
  - Balance Transfer

  - Change Earn Date
  - Deactivate Card
  - Earn Points
  - Expire Points
  - Inquiry
  - Issue
  - Point Recovery
  - Reset Expiration Date
  - Return
  - Sustain Extension
  - Void Transaction
- **Business Date -** The business date when the activity type occurred for the Loyalty Program and Level.
- **Number of Accounts -** The total number of accounts that had this type of activity for the Program Level on this date.
- **Number of Points -** The total number of points for the activity type on this date. A negative number, such as for an award, is expressed as an absolute value.
- **Average Points** - The Number of Points / the Number of Accounts.
- **Totals for Activity Type**:
  - **Number of Accounts -** The total number of accounts that had this type of activity for the Program Level during this date range.
  - **Number of Points -** The total number of points for the activity type for this Program Level during this date range. A negative number, such as for an award, is expressed as an absolute value.
  - **Average Points -** The Number of Points / the Number of Accounts.
- **Totals for Program Level**:
  - **Number of Accounts** - The total number of accounts that had activity for the Program Level during this date range.
  - **Number of Points** - The total number of points for this Program Level during this date range. A negative number, such as for an award, is expressed as an absolute value.
  - **Average Points -** The Number of Points / the Number of Accounts.
- **Totals for Program**:
  - **Number of Accounts** - The total number of accounts that had activity for the Program.
  - **Number of Points -** The total number of points for all included activities for the Program.
  - **Average Points** - The Number of Points / the Number of Accounts.
- **Report Totals**:
  - **Number of Accounts** - The total number of accounts included on the report.
  - **Number of Points** - The total number of points for all activities included on the report. Calculated by adding absolute values.
  - **Average Points** - The Number of Points / the Number of Accounts.

Loyalty Issue Rule Impact Report

This report displays transaction level counts of merchandise associated with purchases against a Loyalty Issue Rule.

Selection Criteria

- **Program Level ID / Name** - The ID and Name identifying a Level for a Loyalty Program. Optionally, select Search to work with the list of eligible Levels, search based on Level ID and Name, or remove Levels from the list selected for the report.

  After you make a Program ID / Name selection, clear the Loyalty Rule ID that is automatically selected as a result and reset Loyalty Rule IDs as needed.
- **Loyalty Rule ID / Name** - The ID and Name identifying a Rule that controls issuing points for a Loyalty Level. Optionally, select Search to work with the list of eligible Rules, search based on Rule ID and Name, or remove Rules from the list selected for the report.
- **Activity Time Period** - Optionally, select a time period to include activities that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  > **Note:**
  >
  > If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.
- **Activity Start Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **Activity End Date** - The last date to include on the report. Defaults to the current date (today).
- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of transactions that triggered the application of a Rule included on the entire report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.
- **Program Level ID** - The numeric IDs for Loyalty Levels selected when generating the report. Set to ALL if there was no restriction.
- **Loyalty Rule ID** - The numeric IDs for Rules selected when generating the report. Set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Program Level ID** - The unique identifier for a Loyalty Program Level.
- **Loyalty Rule ID** - Description - The unique identifier for a Loyalty Rule that controls issuing points, and the Description of the Rule.
- **Item Dept ID -** The unique identifier for the Department associated with the Item on the transaction.
- **Item Class ID** - The unique identifier of the Item Class that further defines the Item on the transaction.
- **RTL Trans ID -** A unique identifier for the retail transaction, referencing the Location and Workstation as well as the transaction sequence number.
- **Number of Accounts -** The number of Accounts associated with the transaction ID. Typically set to 1.
- **Transaction Count** - The number of transactions associated with the transaction ID. Typically set to 1.
- **Item Extended Amount** - The extended selling price of the items on the transaction.
- **Totals for Rule**:
  - **Number of Accounts -** The number of Accounts associated with the transactions where the Rule was applied.
  - **Transaction Count -** The number of transactions where the Rule was applied.
  - **Item Extended Amount -** The total extended selling price of the items on the transactions.
- **Totals for Program Level ID**:
  - **Number of Accounts -** The number of Accounts associated with the transactions where a Rule for the Program Level was applied. If an Account was associated with multiple transactions for the Program, it is included for each transaction.
  - **Transaction Count -** The number of transactions where a Rule for the Program was applied.
  - **Item Extended Amount -** The total extended selling price of the items on the transactions.
- Report Total:
  - **Number of Accounts -** The number of Accounts for all transactions included on the report. If an Account was associated with multiple transactions on the report, it is included for each transaction.

  - **Transaction Count** - The number of transactions included on the report.
  - **Item Extended Amount** - The total extended selling price of the items on the transactions.

Loyalty Rules Results Summary Report

This reports displays summary account information by Activity Type for each Loyalty Rule. It is organized by Program levels within the Loyalty Programs

Selection Criteria

- **Program ID / Name** - The ID and Name identifying a Loyalty Program for a Card Definition. All Loyalty Programs are selected by default. Optionally, select Search to work with the list of eligible Loyalty Programs, search based on Loyalty Program Name, or remove Loyalty Programs from the list selected for the report.

  After you make a Program ID / Name selection, clear the Program Level ID that is automatically selected as a result and reset Program Level IDs as needed.
- **Program Level ID / Name** - The ID and Name identifying a Level for a Loyalty Program. Optionally, select Search to work with the list of eligible Levels, search based on Level ID and Name, or remove Levels from the list selected for the report.

  After you make a Program ID / Name selection, clear the Program Level ID that is automatically selected as a result and reset Program Level IDs as needed.
- **Rule ID / Name** - The ID and Name identifying a Rule that controls issuing points for a Loyalty Level. Optionally, select Search to work with the list of eligible Rules, search based on Rule ID and Name, or remove Rules from the list selected for the report.
- **Activity Time Period** - Optionally, select a time period to include activities that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

> **Note:**
>
> If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- **Activity Start Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **Activity End Date** - The last date to include on the report. Defaults to the current date (today).
- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of activity types that triggered the application of a Rule included on the entire report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.

The Report Contents detail information includes:

- **Program ID** - The unique numeric identifier for the Loyalty Program.
- **Program Name** - The Name describing the Loyalty Program.
- **Program Level ID** - The unique numeric identifier for the Loyalty Program Level.
- **Program Level Name** - The name describing the Loyalty Program Level.
- **Loyalty Rule ID** - The unique numeric identifier for the Loyalty Program Rule.
- **Loyalty Rule Name** - The name describing the Loyalty Program Rule.
- **Activity Type** - The type of activity that triggered the application of the Rule.
- **Number Of Accounts** - The number of Accounts for which the Rule was applied for the Activity Type.
- **Number of Points** - The total number of points applied through the Rule.
- **Average Points** - The Number of Points / the Number of Accounts.
- **Program Totals**:
  - **Number of Accounts** - The number of Accounts for which the Rule was applied for the Program.
  - **Number Of Points** - The total number of points applied for the Program.
  - **Average Points** - The Number of Points / the Number of Accounts.
- **Report Totals**:
  - **Number of Accounts** - The number of Accounts for all activities included on the report.
  - **Number Of Points** - The number of points for all Accounts and activities included on the report.
  - **Average Points** - The total Number of Points / the total Number of Accounts.

Loyalty Rules Results Trend Report

This report presents summary information on accounts by Activity Type by Activity Date for each Loyalty Rule. It is organized by Loyalty Program Level for each Loyalty Program.

The report begins with three charts illustrating loyalty rules results activity. One chart displays total number of accounts with rules activity for each date in the selected time period, another displays the number of points involved in the rules results activities for each date, and the third displays average points used for rules results for each date.

> **Note:**
>
> The charts on this report are useful only if you restrict the selection criteria to a single Program ID, Program Level ID, and Activity Type, so you can identify the totals for the type of activity. Otherwise, it would be difficult to determine the different totals for the same date but a different Program ID, Program Level ID, and Activity Type.

Selection Criteria

- **Program ID / Name** - The ID and Name identifying a Loyalty Program for a Card Definition. All Loyalty Programs are selected by default. Optionally, select Search to work with the list of eligible Loyalty Programs, search based on Loyalty Program Name, or remove Loyalty Programs from the list selected for the report.

  After you make a Program ID / Name selection, clear the Program Level ID that is automatically selected as a result and reset Program Level IDs as needed.
- **Program Level ID / Name -** The ID and Name identifying a Level for a Loyalty Program. Optionally, select Search to work with the list of eligible Levels, search based on Level ID and Name, or remove Levels from the list selected for the report.
- **Activity Type -** Codes identifying types of activity for a Loyalty account. All activity types are selected by default. Optionally, select Search to work with the list of eligible Activity Types, search based on Activity Type, or remove Activity Types from the list selected for the report. Possible Activity Types are:
  - Account Merge
  - Activate Card
  - Award
  - Balance Transfer
  - Change Earn Date
  - Change Level
  - Deactivate Card
  - Earn Points
  - Expire Points
  - Inquiry
  - Issue
  - Point Recovery
  - Reset Expiration Date - Return
  - Sustain Extension
  - Void Transaction

- **Activity Time Period** - Optionally, select a time period to include activities that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

> **Note:**
>
> If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- **Activity Start Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **Activity End Date** - The last date to include on the report. Defaults to the current date (today).
- **Row Limi**t - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of rules applied for all Program Levels, Activity Types, and Activity Dates for the entire report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.
- **Program** - The numeric ID for a Loyalty Program selected when generating the report. Set to ALL if there was no restriction.
- **Program Level** - The numeric ID for a Loyalty Level selected when generating the report. Set to ALL if there was no restriction.
- **Activity Type** - The Activity Types selected when generating the report. Set to ALL if there was no restriction.
- **Number of Accounts Chart** - Displays the total number of Loyalty accounts for which rules were applied for each date.

Figure 13-17 Loyalty Rules Results Trend Report - Number of Accounts Chart

- **Number of Points Chart -** Displays the total number of points involved in rules results for each date.

  Negative numbers are presented as absolute values. For example, if the Activity Type is Award, and the amount of Points deducted is 500, the number of points depicted on this graph is 500 rather than -500.

Figure 13-18 Loyalty Rules Results Trend Report - Number of Points Chart

- **Average Points Chart -** Displays the average number of points involved in rules results for each date.

  Negative numbers are presented as absolute values. For example, if the Activity Type is Award, and the average amount of Points deducted is 100, the average amount of points depicted on this graph is 100 rather than -100.

Figure 13-19 Loyalty Rules Results Trend Report - Average Points Chart

The Report Contents detail information includes:

- **Program** - The unique numeric identifier for the Loyalty Program, and the Name describing the Loyalty Program.

For each Program Level:

- **Program Level ID** - Name - The unique numeric identifier for the Program Level, and the Name describing the Level.
- **Loyalty Rule ID** - The unique numeric identifier for the Loyalty Rule.
- **Description** - The name describing the Rule.
- **Activity Type** - The activity associated with the rule result. Possible Activity Types are:
  - Account Merge
  - Activate Card
  - Award
  - Balance Transfer
  - Change Earn Date
  - Change Level
  - Deactivate Card
  - Earn Points
  - Expire Points
  - Inquiry
  - Issue
  - Point Recovery
  - Reset Expiration Date
  - Return
  - Sustain Extension
  - Void Transaction
- **Activity Date** - The date when the activities took place.

- **Number of Accounts -** The number of Accounts involved in the rule results for the date, activity, and rule.
- **Number of Points -** The net total number of points involved in the rule results for the date, activity, and rule. Expressed as an absolute value.
- **Average Points -** The Number of Points / the Number of Accounts.
- **Totals for Rule**:
  - **Number of Accounts -** The number of Accounts involved in rule results for the rule.
  - **Number of Points -** The number of points involved in rule results for the rule.
  - **Average Points -** The Number of Points / the Number of Accounts.
- **Totals for Program Level**:
  - **Number of Accounts -** The number of Accounts involved in rule results for the Program Level.
  - **Number of Points -** The number of points involved in rule results for the Program Level.
  - **Average Points -** The Number of Points / the Number of Accounts.
- Totals for Program:
  - **Number of Accounts -** The number of Accounts involved in rule results for the Program.
  - **Number of Points -** The number of points involved in rule results for the Program.
  - **Average Points -** The Number of Points / the Number of Accounts.
- **Report Totals**:
  - **Number of Accounts -** The total number of Accounts involved in rule results on the report.
  - **Number of Points -** The total number of points involved in rule results on the report.
  - **Average Points -** The Number of Points / the Number of Accounts.

    An account can be included in the Number of Accounts totals more than once if, for example, multiple rules were applied for the account during the date range on the report.

Loyalty Account Balance Summary Report

This report presents summary information about the Loyalty Account balances, by Program Level, within each Program.

Selection Criteria

- **Program ID / Name -** The ID and Name identifying a Loyalty Program for a Card Definition. All Loyalty Programs are selected by default. Optionally, select Search to work with the list of eligible Loyalty Programs, search based on Loyalty Program Name, or remove Loyalty Programs from the list selected for the report.

  After you make a Program ID / Name selection, clear the Program Level ID that is automatically selected as a result and reset Program Level IDs as needed.
- **Program Level ID / Name -** The ID and Name identifying a Level for a Loyalty Program. Optionally, select Search to work with the list of eligible Levels, search based on Level ID and Name, or remove Levels from the list selected for the report.

- **Activity Time Period** - Optionally, select a time period to include Loyalty Cards generated during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  > **Note:**
  >
  > If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- **Activity Start Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **Activity End Date** - The last date to include on the report. Defaults to the current date (today).

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.

The Report Contents detail information includes:

- **Program** - The unique numeric identifier for the Loyalty Program, and the Name describing the Loyalty Program.
- **Program Level ID** - The unique numeric identifier for the Loyalty Program Level.
- **Program Level Name -** The Name describing the Loyalty Program Level.
- **Balance Range** - The range of balance totals categorizing the Loyalty Accounts for all generated Cards, including Cards not yet activated and Cards that have been activated and then deactivated. Possible ranges are:
  - **Balance Less Than 0 -** Includes Accounts with negative balances.
  - **Balance Equals 0 -** Includes Accounts whose balances are exactly 0.00.
  - **Balance Greater Than .01 -** Includes Accounts whose balances are greater than 0.00, including Accounts with balances of .01.

- **Rolled-Up Earned Points Balance** - The total points balance for all Accounts included in the Balance Range.
- **Number Of Accounts -** The total number of Loyalty Accounts for all generated Cards in the Balance Range, including Cards not yet activated and Cards that have been activated and then deactivated.
- **Totals for Program Level**:
  – **Rolled-Up Earned Points Balance -** The total points balance for all Accounts for the Level.
  – **Number of Accounts** - The total number of Loyalty Accounts for all generated Cards for the Program Level, including Cards not yet activated and Cards that have been activated and then deactivated.
- **Totals for Program**:
  – **Rolled-Up Earned Points Balance -** The total points balance for all Accounts for the Program.
  – **Number of Accounts** - The total number of Loyalty Accounts for all generated Cards for the Program, including Cards not yet activated and Cards that have been deactivated.
- **Report Totals**:
  – **Rolled-Up Earned Points Balance** - The total points balance for all Accounts included in the totals on the report.
  – **Number of Accounts** - The total number of Loyalty Accounts for all generated Cards included in the totals on the report.

Loyalty Account Last Use Summary Report

This report presents Loyalty Account summary information within Loyalty Program Level, grouped by the number of months since last use date.

Selection Criteria

- **Program ID / Name -** The ID and Name identifying a Loyalty Program for a Card Definition. All Loyalty Programs are selected by default. Optionally, select Search to work with the list of eligible Loyalty Programs, search based on Loyalty Program Name, or remove Loyalty Programs from the list selected for the report.
- **Program Level ID / Name -** The ID and Name identifying a Level for a Loyalty Program. Optionally, select Search to work with the list of eligible Levels, search based on Level ID and Name, or remove Levels from the list selected for the report.
- **Activity Time Period** - Optionally, select a time period to include Loyalty Cards generated during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:
  – Yesterday
  – Last Week
  – Last Month
  – Last Year
  – Last 30 Days
  – Last 60 Days

  - Last 90 Days
  - This Week
  - This Month
  - This Year

> **Note:**
>
> If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- **Activity Start Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **Activity End Date** - The last date to include on the report. Defaults to the current date (today).

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.

The Report Contents detail information includes:

- **Program** - The unique numeric identifier for the Loyalty Program, and the Name describing the Loyalty Program.
- **Program Level ID** - The unique numeric identifier for the Loyalty Program Level.
- **Program Level Name** - The Name describing the Loyalty Program Level.
- **Last Use Interval** - The range of dates when there was most recently any activity for the Accounts. Possible intervals are:
  - Less Than 30 Days - Includes Cards that have not yet been activated.
  - 31 to 60 Days
  - 61 to 90 Days
  - Over 90 Days - Includes Cards that have been deactivated.
  - Never Used
- **Number Of Accounts** - The total number of Loyalty Accounts for all generated Cards for this Level in the Last Use Interval, including Cards not yet activated and Cards that have been deactivated.
- **Earned Points Balance** - The total points balance for all Accounts included in the Last Use Interval.
- **Average Earned Points Balance** - The Earned Points Balance / the Number of Accounts.
- **Totals for Program Level**:

  - **Number Of Accounts** - The total number of Loyalty Accounts for all generated Cards in the Program Level, including Cards not yet activated and Cards that have been deactivated.
  - **Earned Points Balance** - The total points balance for all Accounts for the Program Level.
  - **Average Earned Points Balance** - The Earned Points Balance / the Number of Accounts.
- **Totals for Program**:
  - **Number Of Accounts** - The total number of Loyalty Accounts for all generated Cards in the Program, including Cards not yet activated and Cards that have been deactivated.
  - **Earned Points Balance** - The total points balance for all Accounts for the Program.
  - **Average Earned Points Balance** - The Earned Points Balance / the Number of Accounts.
- Report Totals:
  - **Number Of Accounts** - The total number of Loyalty Accounts for all generated Cards included in the report totals.
  - **Earned Points Balance** - The total points balance for all Accounts included in the report totals.
  - **Average Earned Points Balance** - The Earned Points Balance / the Number of Accounts.

Loyalty Account Life Cycle Summary Report

This report presents summary information within a Loyalty Program Level, grouped by the number of months that the Accounts have been in use.

Selection Criteria

- **Program ID / Name** - The ID and Name identifying a Loyalty Program for a Card Definition. All Loyalty Programs are selected by default. Optionally, select Search to work with the list of eligible Loyalty Programs, search based on Loyalty Program Name, or remove Loyalty Programs from the list selected for the report.

  After you make a Program ID / Name selection, clear the Program Level ID that is automatically selected as a result and reset Program Level IDs as needed.
- **Program Level ID / Name** - The ID and Name identifying a Level for a Loyalty Program. Optionally, select Search to work with the list of eligible Levels, search based on Level ID and Name, or remove Levels from the list selected for the report.
- **Activity Time Period** - Optionally, select a time period to include Loyalty Cards with activity or transactions during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days

  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

> **Note:**
>
> If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- **Activity Start Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **Activity End Date** - The last date to include on the report. Defaults to the current date (today).
- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of Activation Intervals for all Programs and Program Levels for the entire report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.

The Report Contents detail information includes:

- **Program** - The unique numeric identifier for the Loyalty Program, and the Name describing the Loyalty Program.
- **Program Level ID** - Name - The unique numeric identifier for the Loyalty Program Level, and the Name describing the Loyalty Program Level.
- **Activation Interval** - The time frame when the accounts were created. Possible time frames are:
  - Less Than 30 Days
  - 31 to 60 Days
  - 61 to 90 Days
  - Over 90 Days
- **Number of Accounts** - The total number of accounts for the Level and Activation Interval that have been activated. Includes accounts that have been activated and then deactivated.
- **Earned Points Balance** - The total balance of points for the accounts.
- **Average Earned Points Balance** - The Earned Points Balance / the Number of Accounts.
- **Totals for Program Level**:

  - **Number of Accounts** - The total number of accounts for the Program Level that have been activated. Includes accounts that have been activated and then deactivated.
  - **Earned Points Balance** - The total number of points for the accounts.
  - **Average Earned Points Balance** - The Earned Points Balance / the Number of Accounts.
- **Totals for Program**:
  - **Number of Accounts** - The total number of accounts for the Program that have been activated. Includes accounts that have been activated and then deactivated.
  - **Earned Points Balance** - The total number of points for the accounts.
  - **Average Earned Points Balance** - The Earned Points Balance / the Number of Accounts.
- **Report Totals**:
  - **Number of Accounts** - The total number of accounts included on the report that have been activated. Includes accounts that have been activated and then deactivated.
  - **Earned Points Balance** - The total number of points for the accounts.
  - **Average Earned Points Balance** - The Earned Points Balance / the Number of Accounts.

Loyalty Account Activity Summary Award Report

This report presents the earned points from Award rules, or paid points for Awards, by Loyalty Account, within a given period of time.

Selection Criteria

- **Program ID / Name** - The ID and Name identifying a Loyalty Program for a Card Definition. All Loyalty Programs are selected by default. Optionally, select Search to work with the list of eligible Loyalty Programs, search based on Loyalty Program Name, or remove Loyalty Programs from the list selected for the report.

  After you make a Program ID / Name selection, clear the Program Level ID that is automatically selected as a result and reset Program Level IDs as needed.
- **Program Level ID / Name** - The ID and Name identifying a Level for a Loyalty Program. Optionally, select Search to work with the list of eligible Levels, search based on Level ID and Name, or remove Levels from the list selected for the report.
- **Activity Time Period** - Optionally, select a time period to include Loyalty Cards with award transaction dates during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week

  - This Month
  - This Year

> **Note:**
>
> If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- **Activity Start Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **Activity End Date** - The last date to include on the report. Defaults to the current date (today).
- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of Account IDs for all Programs and Program Levels for the entire report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.
- **Program ID** - The numeric ID for the Loyalty Programs selected when generating the report. Set to ALL if there was no restriction.
- **Program Level** - The numeric ID for the Loyalty Levels selected when generating the report. Set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Program** - The unique numeric identifier for the Loyalty Program, and the Name describing the Loyalty Program.
- **Program Level ID** - Name **-** The unique numeric identifier for the Loyalty Program Level, and the Name describing the Loyalty Program Level.
- **Account ID -** The unique numeric identifier for the account.
- **Earned Points** - The current total earned points balance for the account during the activity period, net of points used for awards.
- **Totals for Program Level** - The total Earned Points for the Program Level during the activity period.
- **Totals for Program** - The total Earned Points included on the report for the Program during the activity period.
- **Report Totals -** The total Earned Points included on the report for the activity period.

Loyalty Account Activity Summary Issue Report

This report presents the earned points from Issue rules, by Loyalty Account, within a given period of time.

Selection Criteria

- **Program ID / Name -** The ID and Name identifying a Loyalty Program for a Card Definition. All Loyalty Programs are selected by default. Optionally, select Search to work with the list of eligible Loyalty Programs, search based on Loyalty Program Name, or remove Loyalty Programs from the list selected for the report.

  After you make a Program ID / Name selection, clear the Program Level ID that is automatically selected as a result and reset Program Level IDs as needed.
- **Program Level ID / Name** - The ID and Name identifying a Level for a Loyalty Program. Optionally, select Search to work with the list of eligible Levels, search based on Level ID and Name, or remove Levels from the list selected for the report.
- **Activity Time Period** - Optionally, select a time period to include Loyalty Cards with issue transaction dates during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  > **Note:**
  >
  > If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.
- Activity Start Date **-** The first date to include on the report. Defaults to the previous date (yesterday).
- Activity End Date - The last date to include on the report. Defaults to the current date (today).
- Row Limit **-** Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of Account IDs for all Programs and Program Levels for the entire report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.

- **Date Range** - The date range selected when generating the report.
- **Program ID** - The numeric ID for the Loyalty Programs selected when generating the report. Set to ALL if there was no restriction.
- **Program Level** - The numeric ID for the Loyalty Levels selected when generating the report. Set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Program ID** - Name - The unique identifier for the Loyalty Program, and the Name describing the Loyalty Program.
- **Program Level ID** - Name - The unique identifier for the Loyalty Program Level, and the Name describing the Loyalty Program Level.
- **Account ID** - The unique numeric identifier for an account associated with any issue activity.
- **Activity Type** - Set to Issue.
- **Earned Points** - The total points issued for the account for the date range. Not net of points used for level changes or awards.
- **Totals for Program Level** - The total Earned Points for the Program Level for the date range. Not net of points used for level changes or awards.
- **Totals for Program** - The total Earned Points included on the report for the Program for the date range. Not net of points used for level changes or awards.
- **Report Totals** - The total Earned Points included on the report. Not net of points used for level changes or awards.

Loyalty Program Level Summary Report

This report presents the current balance statistics for Program Levels within Programs.

Selection Criteria

- **Program ID / Name** - The ID and Name identifying a Loyalty Program for a Card Definition. All Loyalty Programs are selected by default. Optionally, select Search to work with the list of eligible Loyalty Programs, search based on Loyalty Program Name, or remove Loyalty Programs from the list selected for the report.

  After you make a Program ID / Name selection, clear the Program Level ID that is automatically selected as a result and reset Program Level IDs as needed.
- **Program Level ID / Name** - The ID and Name identifying a Level for a Loyalty Program. Optionally, select Search to work with the list of eligible Levels, search based on Level ID and Name, or remove Levels from the list selected for the report.
- **Activity Time Period** - Optionally, select a time period to include Loyalty Cards that were generated during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days

  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

> **Note:**
>
> If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- **Activity Start Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **Activity End Date** - The last date to include on the report. Defaults to the current date (today).
- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of Program Levels for all Programs for the entire report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.

The Report Contents detail information includes:

- **Program** - The unique identifier for the Loyalty Program, and the Name describing the Loyalty Program.
- **Program Level ID** - The unique numeric identifier for the Loyalty Program Level.
- **Program Level Name** - The Name describing the Loyalty Program Level.
- **Number of Accounts** - The total number of cards generated during the date range that are currently at this Program Level.
- **Total Earned Point Balance** - The total current net earned points for all accounts generated during the date range that are currently at this Program Level.
- **Total Bonus Point Balance** - The total current net bonus points applied for all accounts generated during the date range that are currently at this Program Level.
- **Total Escrow Point Balance** - The total current net escrow points for all accounts generated during the date range that are currently at this Program Level.
- **Average Earned Balance** - The Total Earned Point Balance / the Number of Accounts.
- **Average Bonus Balance** - The Total Bonus Point Balance / the Number of Accounts.
- **Average Escrow Balance** - The Total Escrow Point Balance / the Number of Accounts.
- **Totals for Program**:

  - **Number of Accounts** - The total number of cards generated during the date range for the Program.
  - **Total Earned Point Balance** - The total current net earned points for all accounts generated during the date range for the Program.
  - **Total Bonus Point Balance** - The total current net bonus points applied for all accounts generated during the date range for the Program.
  - **Total Escrow Point Balance** - The total current net escrow points for all accounts generated during the date range for the Program.
  - **Average Earned Balance** - The Total Earned Point Balance / the Number of Accounts.
  - **Average Bonus Balance** - The Total Bonus Point Balance / the Number of Accounts.
  - **Average Escrow Balance** - The Total Escrow Point Balance / the Number of Accounts.
- Report Totals:
  - **Number of Accounts** - The total number of cards included on the report.
  - **Total Earned Point Balance** - The total current net earned points for all accounts included on the report.
  - **Total Bonus Point Balanc**e - The total current net bonus points applied for all accounts included on the report.
  - **Total Escrow Point Balanc**e - The total current net escrow points for all accounts included on the report.
  - **Average Earned Balance** - The Total Earned Point Balance / the Number of Accounts.
  - **Average Bonus Balance** - The Total Bonus Point Balance / the Number of Accounts.
  - **Average Escrow Balance** - The Total Escrow Point Balance / the Number of Accounts.

Segment Management Reports

The Segment Management Reports include:

- N-Tile / Range Strata Report
- Segment by Home Location Report
- Segment by State Report
- Segment Count List Report
- Segment Customer Master Report
- Segment Purchase Profile Report
- Segment Trend Analysis Report

N-Tile / Range Strata Report

This report presents details on Customer Segments broken out by strata.

Selection Criteria

- **Segment ID / Name** - The ID and Name identifying a Customer Segment. All eligible Segments are selected by default. Optionally, select Search to work with the list of eligible Segments, search based on Segment Name, or remove Segments from the list selected for the report. Only Public Stratified Segments with a Customer Count > 0 are eligible for selection.
- **Save List Flag** - Optionally, select Yes or No to have the report include Segments based on whether the Save as List flag was selected at Segment creation. Set to All by default.
- **Trended Flag** - Optionally, select Yes or No to have the report include Segments based on whether the Trend Results? flag was selected at Segment creation.
- **Activity Time Period** - Optionally, select a time period to include Segments run during this period on the report rather than entering a Start Segment Run Date or End Segment Run Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  > **Note:**
  >
  > If you select an Activity Time Period, the Start Segment Run Date and End Segment Run Date criteria are ignored.

- **Start Segment Run Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **End Segment Run Date** - The last date to include on the report. Defaults to the current date (today).
- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of levels for all runs of all Segment Strata for the entire report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.
- **Segment ID** - The numeric ID for the Segments selected when generating the report. Set to ALL if there was no restriction.

- **Save List Flag** - Indicates if a Save List Flag setting of Yes or No was selected when generating the report. Set to ALL if there was no restriction.
- **Trended Flag** - Indicates if a Trended Flag setting of Yes or No was selected when generating the report. Set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Segment** - The unique numeric identifier for the Segment and the Name describing the Segment.
- **Run ID** - The unique numeric identifier for a run of the Segment. Each Run is numbered sequentially, starting with a Run ID of 0.
- **Strata Type** - Either Range Strata or N-Tile.
- **Segment Count** - The number of Customer records included in the Segment.
- **Strata Level ID** - Name **-** The unique numeric identifier of the stratum and the Name describing the stratum.
- **Save List Flag and Trended Flag -** Indicates the settings of the Save as List flag and the Trend Results? flag specified at Segment creation.
- **Min Value and Max Value -** Depending on whether this is an N-Tile or Range Strata Segment:
  - **N-Tile** - The minimum and maximum values determined by the system when splitting the Segment into strata.
  - **Range Strata -** The Range From and Range To values specified when the Segment was created.

  For example, if the Segment is stratified based on Annual Income, these are the minimum and maximum Annual Income totals qualifying Customers for assignment to this stratum.
- **Percent Total** - The percentage of the Segment Count that consists of the Customers in this stratum: Stratified Customer Count / Segment Count, presented as a percentage.
- **Run Date** - The date when the Run took place.
- **Stratified Customer Count** - The total number of Customer records in the stratum.
- **Totals for Run** - The total Segment Count for the Run included on the report.
- **Totals for Segment -** The total Segment Count included on the report.
- **Report Totals** - The total Segment Count for all Segments included on the report.

Segment by Home Location Report

This report presents a count of Customers, by their Home Locations, for Customer Segments.

Customers who are not assigned to a Home Location are not included in the totals on the report.

Selection Criteria

- **Segment ID / Name -** The ID and Name identifying a Customer Segment. All eligible Segments are selected by default. Optionally, select Search to work with the list of eligible Segments, search based on Segment Name, or remove Segments from the list selected for the report. Only Segments that have at least one Customer with an address are eligible for selection.

- **Time Period** - Optionally, select a time period to include Segments run during this period on the report rather than entering a Start Segment Run Date or End Segment Run Date. For manual Segments, the time period applies to when the Customers were added to the Segments. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

> **Note:**
>
> If you select an Activity Time Period, the Start Segment Run Date and End Segment Run Date criteria are ignored.

- **Start Segment Run Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **End Segment Run Date** - The last date to include on the report. Defaults to the current date (today).
- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of home location/ segment combinations for the entire report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.
- **Segment Name** - The numeric ID for the Segments selected when generating the report. Set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Segment ID** - Name - The unique numeric identifier for the Segment and the Name describing the Segment.
- **Home Location** - The Home Location specified for any Customers in the Segment, prefixed by Store Location.
- **Location Name** - The Name describing the Home Location.

- **Customer Count** - The number of Customers assigned to this Home Location for the Segment.
- **Totals for Segment -** The total number of Customers in the Segment assigned to Home Locations.
- **Report Totals -** The total Customer Count for all Segments included on the report.

Segment by State Report

This report presents a count of Customers, by the states or provinces for each primary or non-primary address, for each Customer Segment.

Customers who are not assigned to any address are not included in the totals on the report.

Selection Criteria

- **Segment ID / Name** - The ID and Name identifying a Customer Segment. All eligible Segments are selected by default. Optionally, select Search to work with the list of eligible Segments, search based on Segment Name, or remove Segments from the list selected for the report. Only Segments that have at least one Customer with an address are eligible for selection.
- **Time Period** - Optionally, select a time period to include Segments run during this period on the report rather than entering a Start Segment Run Date or End Segment Run Date. For manual Segments, the time period applies to when the Customers were added to the Segments. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  > **Note:**
  >
  > If you select an Activity Time Period, the Start Segment Run Date and End Segment Run Date criteria are ignored.

- **Start Segment Run Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **End Segment Run Date** - The last date to include on the report. Defaults to the current date (today).

- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of states or provinces for all Segments for the entire report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.
- **Segment Name** - The numeric ID for the Segments selected when generating the report. Set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Segment ID** - Name - The unique numeric identifier of the Segment and the Name describing the Segment.
- **State** - The name of the state or province where Customers in the Segment have addresses.
- **Customer Count** - The number of Customer addresses in this state for the Segment. Includes both primary and non-primary addresses.
- **Totals for Segment** - The total number of Customer addresses for the Segment.
- **Report Totals** - The total Customer Count for all Segments included on the report.

Segment Count List Report

This report presents the details of each Segment run within a specified time period.

Stratified and unstratified Segments that have not been run during the selected time period are not included on the report.

Selection Criteria

- **Segment ID / Name** - The ID and Name identifying a Customer Segment. All eligible Segments are selected by default. Optionally, select Search to work with the list of eligible Segments, search based on Segment Name, or remove Segments from the list selected for the report. Only Segments that have at least one Customer with an address are eligible for selection.
- **Time Period** - Optionally, select a time period to include Segments run during this period on the report rather than entering a Start Segment Run Date or End Segment Run Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days

  - This Week
  - This Month
  - This Year

> **Note:**
>
> If you select an Activity Time Period, the Start Segment Run Date and End Segment Run Date criteria are ignored.

- **Start Segment Run Date -** The first date to include on the report. Defaults to the previous date (yesterday).
- **End Segment Run Date -** The last date to include on the report. Defaults to the current date (today).

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.
- **Segment ID** - The numeric ID for the Segments selected when generating the report. Set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Segment ID** - Name - The unique numeric identifier for the Segment and the Name describing the Segment.
- **Save List Option** - Indicates the settings of the Save as List flag specified at Segment creation.
- **Trended Flag** - Indicates the settings of the Trend Results? flag specified at Segment creation.
- **Last Run Date -** The last date when the Segment was run. Set to N/A for manual Segments.
- **Run Count** - The number of times when a segment was run. This count does not apply for a manual Segment, although a Run Count might be listed.
- **Customer Count** - The total number of Customers in the Segment.
- **Report Totals**:
  - **Run Count -** The total Run Count for all Segments listed on the report.
  - **Customer Count -** The total number of Customers in all Segments listed on the report.

Segment Customer Master Report

This report presents a listing of information about the Customers in each Segment. Only Customers that have primary email, phone, and mailing addresses are included on the report.

Selection Criteria

- **Segment ID / Name** - The ID and Name identifying a Customer Segment. All Segments that include at least one Customer are selected by default. Optionally, select Search to work with the list of Segments, search based on Segment Name, or remove Segments from the list selected for the report. Only Segments that have at least one Customer are eligible for selection.
- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of Customers for all Segments for the entire report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Segment ID** - The numeric ID for the Segments selected when generating the report. Set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Segment ID** - The unique numeric identifier for the Segment and the Name describing the Segment.
- **Run ID** - This field is not currently implemented.
- **Cust ID** - Name **-** The unique numeric identifier for the Customer, and the Customer's first and last name.
- **Gender** - The Customer's gender, if known; otherwise, set to N/A.
- **Active Flag** - Set to Yes unless the Customer has been flagged as inactive.
- **Street, City, State** - The street address, city, and state or province for the Customer's primary mailing address.
- **Postal Code** - The postal or Zip code for the Customer's primary mailing address.
- **Phone Number** - The Customer's primary phone number.
- **Email** - The Customer's primary email address.
- **Home Location** - The unique numeric code for the Customer's Home Location, if any.
- **Birth Date** - The Customer's birth date, if known.
- **SignUp Date** - The date when the Customer record was created.
- **First Trans Date** - The date of the Customer's first recorded transaction, if any; otherwise, set to N/A.
- **Last Trans Date** - The date of the Customer's most recently recorded transaction, if any; otherwise, set to N/A.
- **Total Return Item Count Dollars** - The total extended merchandise value of returned items from the Customer's transaction history. Rounded to the nearest whole number.
- **Total Sale Item Count Dollars** - The total extended merchandise value of sold items from the Customer's transaction history. Rounded to the nearest whole number.
- **Total Trans Count** - The total number of individual transactions from the Customer's transaction history. Each transaction can include multiple items.

- **Total Profit Percent** - The total Sale Item Count Dollars - the total extended Unit Cost of the items on the transactions / the total Sale Item Count Dollars. Presented as a percentage with a two-position decimal.
- **YTD Return Item Count Dollars** - The total extended merchandise value of returned items for the Customer's transactions during the current year. Rounded to the nearest whole number.
- **YTD Sale Item Count Dollars** - The total extended merchandise value of sold items from the Customer's transactions during the current year. Rounded to the nearest whole number.
- **YTD Profit Percent -** The total YTD Sale Item Count Dollars **-** the total extended unit cost of the items on the transactions / the total YTD Sale Item count Dollars. Presented as a percentage with a two-position decimal.

Segment Purchase Profile Report

This report presents counts, by Segment, of individual items purchased.

Segments that have not had purchases during the selected time period are not included on the report.

Selection Criteria

- **Segment ID / Name** - The ID and Name identifying a Customer Segment. All eligible Segments are selected by default. Optionally, select Search to work with the list of eligible Segments, search based on Segment Name, or remove Segments from the list selected for the report.
- **Purchase Activity Time Period** - This criterion is not implemented for this report. All purchases for the selected Segment are eligible for inclusion, regardless of activity date.
- **Purchase Activity Start Date** - This criterion is not implemented for this report.
- **Purchase Activity End Date** - This criterion is not implemented for this report.
- **Row Limit -** Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of items for all Segments for the entire report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.
- **Segment ID** - The numeric ID for the Segments selected when generating the report. Set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Segment ID** - Name **-** The unique numeric identifier of the Segment and the Name describing the Segment.
- **Item Class** - The code identifying the Class for the item.
- **Item Sub Class -** The code identifying the Sub Class for the item.

- **Item ID** - The unique identifier for the item.
- **Item Description** - The description of the item.
- **Customer Count** - The number of Customers within the Segment that purchased the item.
- **Transaction Count** - The total number of transactions in which Customers in the Segment purchased the item.
- **Item Quantity** - The total quantity of the item purchased by Customers in the Segment.
- **Item Extended Amount** - The total extended amount paid for all units of the item sold to Customers in the Segment.
- **Units per Transaction** - The average number of units of the item purchased in a transaction by a Customer in the Segment.
- **Totals for Item Class**:
  - **Customer Count** - The total number of Customers within the Segment that purchased any items in the Item Class.
  - **Transaction Count** - The total number of transactions in which Customers in the Segment purchased items in the Item Class.
  - **Item Quantity** - The total quantity of items in the Item Class purchased by Customers in the Segment.
  - **Item Extended Amount** - The total extended amount paid for all items in the Item Class sold to Customers in the Segment.
  - **Units per Transaction** - The average number of units in the Item Class purchased in a transaction by a Customer in the Segment. Rounded to the nearest whole number.
- **Totals for Segment**:
  - **Customer Count** - The total number of Customers within the Segment that purchased any items.
  - **Transaction Count** - The total number of transactions in which Customers in the Segment purchased items.
  - **Item Quantity** - The total quantity of items purchased by Customers in the Segment.
  - **Item Extended Amount** - The total extended amount paid for all items sold to Customers in the Segment.
  - **Units per Transaction** - The average number of units in purchased in a transaction by a Customer in the Segment. Rounded to the nearest whole number.
- **Report Totals**:
  - **Customer Count** - The total number of Customers included on the report.
  - **Transaction Count** - The total number of transactions included on the report.
  - **Item Quantity** - The total quantity of purchased items included on the report.
  - **Item Extended Amount** - The total extended amount paid for all items included on the report.
  - **Units per Transaction** - The average number of units purchased in a transaction. Rounded to the nearest whole number.

Segment Trend Analysis Report

This report presents trend totals for Customer Segments broken out by Run ID.

The report includes two charts illustrating trend totals for Customer Segments. One chart displays total Customer counts for each Run ID for a Segment, while the other displays total Customer counts for the strata within a Segment.

> **Note:**
>
> The charts on this report are useful only if you restrict the selection criteria to a single Customer Segment, so you can identify the totals for the Segment Run IDs and strata. Otherwise, it would be difficult to determine the different totals for multiple Customer Segments.

Selection Criteria

- **Segment ID / Name -** The ID and Name identifying a Customer Segment. All eligible Segments are selected by default. Optionally, select Search to work with the list of eligible Segments, search based on Segment Name, or remove Segments from the list selected for the report. Only Stratified Segments that have Trend Results? selected and have a Customer Count > 0 are eligible for selection.
- **Save List Flag -** Optionally, select Yes or No to have the report include Segments based on whether the Save as List flag was selected at Segment creation. Set to All by default.
- **Activity Time Period -** Optionally, select a time period to include Segments run during this period on the report rather than entering a Start Segment Run Date or End Segment Run Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  > **Note:**
  >
  > If you select an Activity Time Period, the Start Segment Run Date and End Segment Run Date criteria are ignored.

- **Start Segment Run Date -** The first date to include on the report. Defaults to the previous date (yesterday).
- **End Segment Run Date -** The last date to include on the report. Defaults to the current date (today).

- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of Run IDs for the entire report.

Click **Apply** to apply the selected criteria and generate the report.

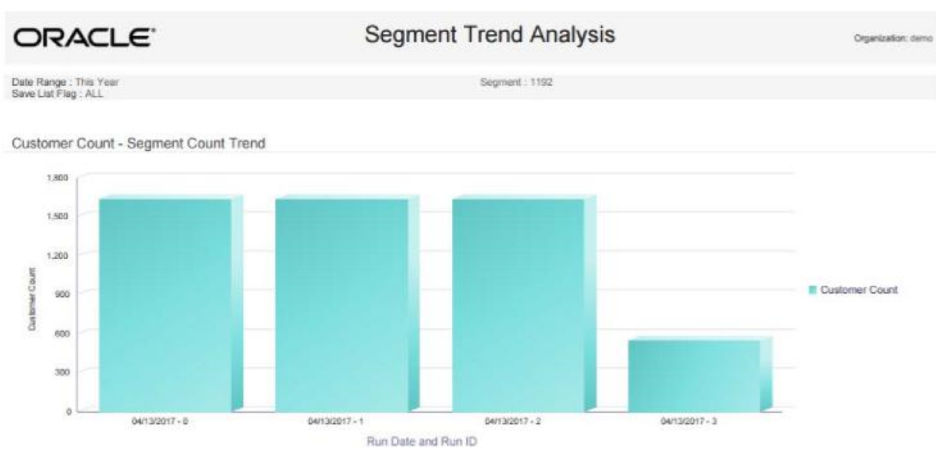
The report does not include any content for Customer Segments that do not have the Save as List flag selected.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.
- **Segment ID** - The numeric ID for the Segments selected when generating the report. Set to ALL if there was no restriction.
- **Save List Flag** - Indicates if a Save List Flag setting of Yes or No was selected when generating the report. Set to ALL if there was no restriction.
- **Customer Count** - Segment Count Trend Chart - Displays the total number of Customers included in the Segment for each Run ID. The date and Run ID are indicated as shown in Figure 13-20.

Figure 13-20 Segment Trend Analysis Report - Customer Count - Segment Count Trend Chart



An additional chart follows the Detail Information for the Segment Count Trend chart.

The Segment Count Trend chart detail information includes:

- **Segment ID** - Name - The unique numeric identifier for and the Name describing the Segment.

For each Run ID:

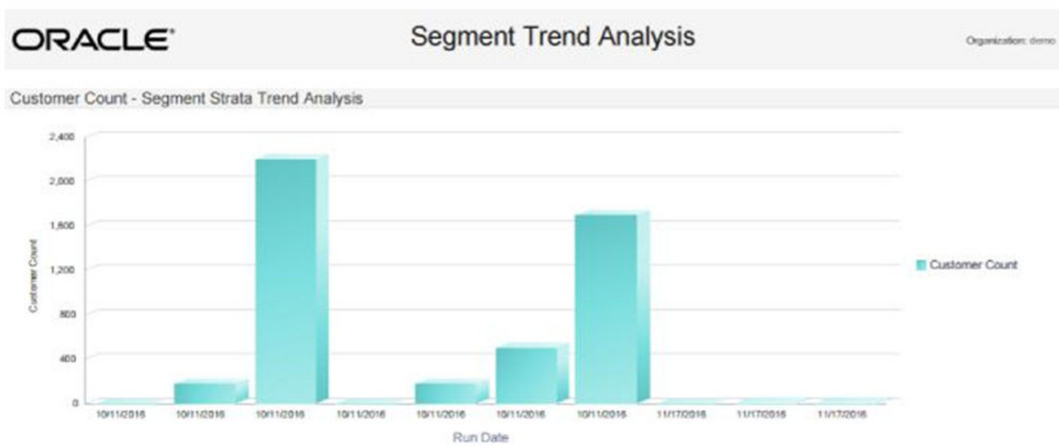
- **Save List Flag** - The setting of the Save List flag for the Segment. Always set to Yes for all Run IDs. The report does not include any data for a Segment that does not have the Save List flag selected.
- **Run ID** - A sequence number identifying the Run for the Segment. Each Run is numbered sequentially, starting with a Run ID of 0.
- **Run Date** - The date when the Run was generated.

- **Customer Count** - The number of Customers in the Segment after processing the Run.
- **Totals for Segment** - The total number of Customers for all Runs.
- **Report Totals** - The total number of Customers for all Runs of all Segments included on the report.

An additional chart follows this detail information.

- **Customer Count** - Segment Strata Trend Analysis Chart - Displays the total number of Customers included in each stratum for the Segment for each Run ID. The date and Run ID are indicated in Figure 13-21.

Figure 13-21 Segment Trend Analysis Report - Customer Count - Segment Strata Trend Analysis Chart



The Segment Strata Trend Analysis chart detail information for each Run ID includes:

- **Segment ID** - Name - The unique numeric identifier for and the Name describing the Segment.
- **Save List Flag** - The setting of the Save List flag for the Segment. Always set to Yes. The report does not include any data for a Segment that does not have the Save List flag selected.
- **Run ID** - A sequence number identifying the Run for the Segment. Each Run is numbered sequentially, starting with a Run ID of 0.

For each stratum in the Segment from the Run ID:

- **Run Date** - The date when the Run was generated. The same date is listed for all strata in the Run.
- **Strata Min Value** - The minimum value for a Customer to be included in the stratum. Based on the Field to Stratify On selected for the Segment.
- **Strata Max Value** - The maximum value for a Customer to be included in the stratum. Based on the Field to Stratify On selected for the Segment.
- **Strata Average Value** - The average value for all Customers in the stratum: the total Value / the Stratified Customer Count.
- **Stratified Customer Count** - The total number of Customers in the stratum.

  The report may include an extra stratum with a Strata Min Value, Strata Max Value, Strata Average Value, and Stratified Customer Count of 0.

- **Totals for Run** - The total number of Customers for all Strata in the Run.
- **Totals for Segment** - The total number of Customers for all Runs for the Segment included on the report.
- **Report Totals** - The total number of Customers for all Runs for all Segments included on the report.

Tender Account Management Reports

The Tender Account Management Reports include:

- Tender (Account) Activity Summary Report
- Tender Activity Summary by Batch Report
- Tender Activity Type Trend Report

Tender (Account) Activity Summary Report

This report displays tender summary information by Activity Type, by Program.

Selection Criteria

- **Program ID / Name** - The ID and Name identifying a Tender Program for a Card Definition. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program Name, or remove Programs from the list selected for the report.
- **Transaction Type** - Codes identifying types of activity for a Tender account. All Transaction Type codes are selected by default. Optionally, select Search to work with the list of eligible Transaction Type Codes, search based on Transaction Type Code, or remove Transaction Type Codes from the list selected for the report. Possible Transaction Type Codes include:
  – Activate Card
  – Card Merge
  – Cash Out
  – Change Acct Expiration Date
  – Change Pin Authentication
  – Deactivate
  – Errors
  – Inquiry
  – Post Authorization
  – Pre Authorization
  – Redemption
  – Release Authorization
  – Reload
  – Replace
  – Reset Expiration Date

  - Return
  - Reverse Transaction
  - Service Charge
  - Unblock
  - Verify Pin Authentication
  - Void Transaction
- **Void Flag** - Optionally, select Yes or No to select Tender account activity based on whether the activity was voided.
- **Activity Time Period** - Optionally, select a time period to include activities that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

> **Note:**
>
> If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- **Activity Start Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **Activity End Date** - The last date to include on the report. Defaults to the current date (today).
- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of Transaction Types and Void Flag settings for any Program ID for the entire report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.

The Report Contents detail information includes:

- **Program ID -** The unique numeric identifier for the Tender Program.

- **Program Name** - The Name describing the Tender Program. For each Transaction Type that occurred for the Program:
- **Transaction Type** - The type of Transaction performed. Possible Transaction Type Codes:
  - Activate Card
  - Card Merge
  - Cash Out
  - Change Acct Expiration Date
  - Change Pin Authentication
  - Deactivate
  - Errors
  - Inquiry
  - Post Authorization
  - Pre Authorization
  - Redemption
  - Release Authorization
  - Reload
  - Replace
  - Reset Expiration Date
  - Return
  - Reverse Transaction
  - Service Charge
  - Unblock
  - Verify Pin Authentication
  - Void Transaction
- **Void Flag** - Indicates that a transaction has been voided. The record for the original transaction remains, and separate voided and unvoided totals are listed. For example, if a Card Reload is voided, the totals for unvoided Card Reloads are not increased, but the totals for voided Card Reloads are increased.
- **Transaction Count** - The total number of transactions for the Transaction Type.
- **Activity Amount** - The total value of transactions for the Transaction Type.
- **Average Amount** - The Activity Amount / the Transaction Count.
- **Program Totals**:
  - **Transaction Count** - The total of the Transaction Counts for the Program.
  - **Activity Amount** - The total value of Activity Amounts for the Program.
  - **Average Amount** - The total Activity Amount / the total Transaction Count for the Program.
- **Report Totals**:
  - **Transaction Count** - The total value of Transaction Counts on the report.
  - **Activity Amount** - The total value of Activity Amounts on the report.

  - **Average Amount** - The total Activity Amount / the total Transaction Count on the report.

Tender Activity Summary by Batch Report

This report displays tender summary information organized by Card Prefix, Series, and Batch, for Activity Types, by Program.

Selection Criteria

- **Program ID / Name -** The ID and Name identifying a Tender Program for a Card Definition. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program Name, or remove Programs from the list selected for the report.
- **Transaction Type -** Codes identifying types of activity for a Tender account. All Transaction Type codes are selected by default. Optionally, select Search to work with the list of eligible Transaction Type Codes, search based on Transaction Type Code, or remove Transaction Type Codes from the list selected for the report. Possible Transaction Type Codes include:
  - Activate Card
  - Card Merge
  - Cash Out
  - Change Acct Expiration Date
  - Change Pin Authentication
  - Deactivate
  - Errors
  - Inquiry
  - Post Authorization
  - Pre Authorization - Redemption
  - Release Authorization
  - Reload
  - Replace
  - Reset Expiration Date
  - Return
  - Reverse Transaction
  - Service Charge - Unblock
  - Verify Pin Authentication
  - Void Transaction
- **Card Prefix -** The prefix number defined for a Card Definition. All Prefixes are selected by default. Optionally, select Search to work with the list of eligible Prefixes, search based on Prefixes, or remove Prefixes from the list selected for the report.
- **Card Series Sequence -** The Card Series Sequence defined for a Card Series. All Sequence numbers are selected by default. Optionally, select Search to work with the list

of eligible Sequence numbers, search based on Sequence numbers, or remove Sequence numbers from the list selected for the report.

- **Batch Number -** The Card Generation Batch Number defined for a batch. All Batch Numbers are selected by default. Optionally, select Search to work with the list of eligible Batch Numbers, search based on Batch Numbers, or remove Batch Numbers from the list selected for the report.
- **Void Flag -** Optionally, select Yes or No to select Tender account activity based on whether the activity was voided.
- **Activity Time Period** - Optionally, select a time period to include activities that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

> **Note:**
>
> If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- **Activity Start Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **Activity End Date** - The last date to include on the report. Defaults to the current date (today).
- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of Transaction Types for any Program ID, Series, and Batch, for the entire report.

Report Contents

The Report Contents header information includes:

- **Organization -** The code identifying your organization.
- **Date Range** - The date range selected when generating the report.

The Report Contents detail information includes:

- **Program ID -** The unique numeric identifier for the Tender Program.
- **Program Name** - The Name describing the Tender Program.

- **Card Prefix** - The Prefix number defined for the Card.
- **Card Series** - The number identifying the Card Series.
- **Card Batch** - The number identifying the Card Batch.
- For each Transaction Type that occurred for the Program, Card Prefix, Series, and Batch:

  Transaction Type - The type of Transaction performed. Possible Transaction Type Codes:
  - Activate Card
  - Card Merge
  - Cash Out
  - Change Acct Expiration Date
  - Change Pin Authentication
  - Deactivate
  - Errors
  - Inquiry
  - Post Authorization
  - Pre Authorization - Redemption
  - Release Authorization
  - Reload
  - Replace
  - Reset Expiration Date - Return
  - Reverse Transaction
  - Service Charge - Unblock
  - Verify Pin Authentication
  - Void Transaction
- **Transaction Count** - The total number of transactions for the Transaction Type.
- **Activity Amount** - The total value of transactions for the Transaction Type.
- **Average Amount** - The Activity Amount / the Transaction Count.
- **Program Totals**:
  - **Transaction Coun**t **-** The total of the Transaction Counts for the Program.
  - **Activity Amount** - The total value of Activity Amounts for the Program.
  - **Average Amount -** The total Activity Amount / the total Transaction Count for the Program.
- **Report Totals**:
  - **Transaction Count -** The total value of Transaction Counts on the report.
  - **Activity Amount -** The total value of Activity Amounts on the report.
  - **Average Amount -** The total Activity Amount / the total Transaction Count on the report.

Tender Activity Type Trend Report

This report displays tender summary information organized by Card Prefix, Series, and Batch, for Activity Types, by Program.

The totals for all Tender Programs with the same Activity Type, Void Flag setting, and Business Date are combined in the charts at the beginning of the report.

The report begins with three charts illustrating tender type activity. Each chart is described in the following sections.

> **Note:**
>
> The charts on this report are useful only if you restrict the selection criteria to a single Transaction Type and Void Flag setting, so you can identify the totals for Transaction Type activity. Otherwise, it would be difficult to determine the different totals for the same date but a different Transaction Type or Void Flag setting. You can also restrict the report by Program ID.

Selection Criteria

- **Program ID / Name -** The ID and Name identifying a Tender Program for a Card Definition. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program Name, or remove Programs from the list selected for the report.
- **Transaction Type -** Codes identifying types of activity for a Tender account. All Transaction Type codes are selected by default. Optionally, select Search to work with the list of eligible Transaction Type Codes, search based on Transaction Type Code, or remove Transaction Type Codes from the list selected for the report. Possible Transaction Type Codes include:
  - Activate Card
  - Card Merge
  - Cash Out
  - Change Acct Expiration Date
  - Change Pin Authentication
  - Deactivate
  - Errors
  - Inquiry
  - Post Authorization
  - Pre Authorization
  - Redemption
  - Release Authorization
  - Reload
  - Replace

  - Reset Expiration Date - Return
  - Reverse Transaction
  - Service Charge
  - Unblock
  - Verify Pin Authentication
  - Void Transaction
- **Void Flag** - Optionally, select Yes or No to select Tender account activity based on whether the activity was voided.
- **Activity Time Period** - Optionally, select a time period to include activities that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

> **Note:**
>
> If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- **Activity Start Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **Activity End Date** - The last date to include on the report. Defaults to the current date (today).
- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of Transaction Types, Void Flag settings, and activity dates for the entire report.

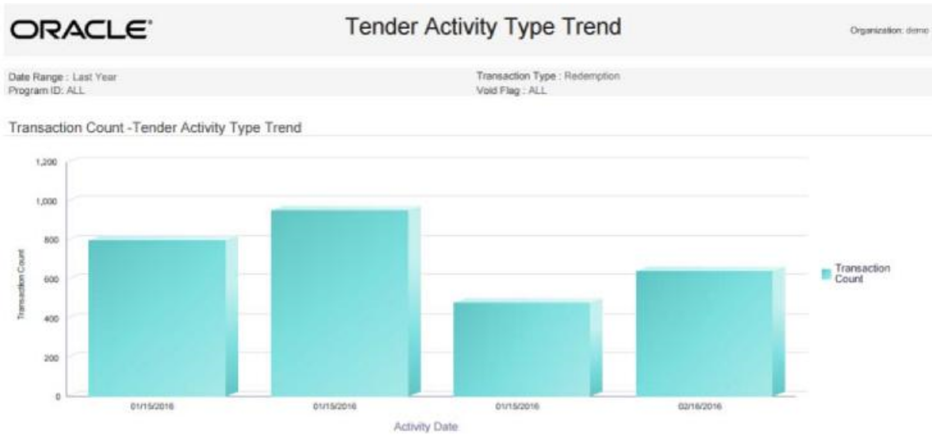
Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.
- **Transaction Type** - The transaction types selected when generating the report, or set to ALL if there was no restriction.

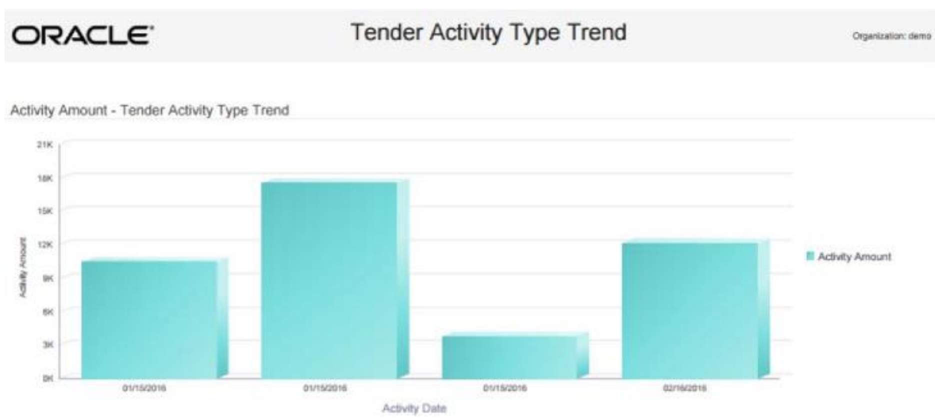
- **Program ID** - The program IDs selected when generating the report, or set to ALL if there was no restriction.
- **Void Flag** - The void flag setting selected for the report. Set to ALL if there was no restriction.
- **Transaction Count Chart -** Displays the total Transaction Count for each Business Date where the Transaction Type and Void Flag setting are the same.

Figure 13-22 Transaction Count - Tender Activity Type Trend Chart



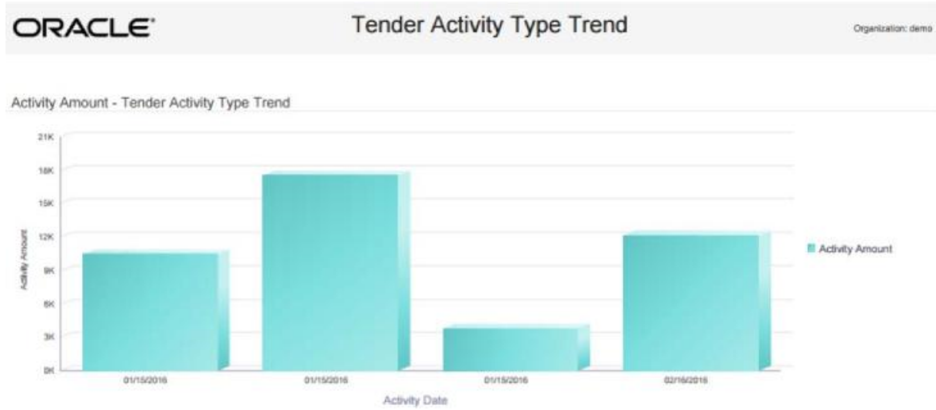
- **Activity Amount Chart** - Displays the total Activity Amount for each Business Date where the Transaction Type and Void Flag setting are the same

Figure 13-23 Activity Amount - Tender Activity Type Trend Chart



- **Average Amount Chart** - Displays the Average Amount for each Business Date where the Transaction Type and Void Flag setting are the same.

Figure 13-24 Average Amount - Tender Activity Type Trend Chart



The Report Contents detail information includes:

- **Program** - The unique numeric identifier for the Tender Program, and the Name describing the Tender Program.
- **Transaction Type** - The type of Transaction performed. Possible Transaction Type Codes:
  – Activate Card
  – Card Merge
  – Cash Out
  – Change Acct Expiration Date
  – Change Pin Authentication
  – Deactivate
  – Errors
  – Inquiry
  – Post Authorization
  – Pre Authorization - Redemption
  – Release Authorization
  – Reload
  – Replace
  – Reset Expiration Date
  – Return
  – Reverse Transaction
  – Service Charge
  – Unblock
  – Verify Pin Authentication
  – Void Transaction
- **Void Flag** - Indicates that a transaction has been voided.
- **Business Date** - The Business Date when the activity occurred.
- **Transaction Count** - The total number of transactions for the Transaction Type on the Business Date and the same Void Flag setting.

- **Activity Amount** - The total value of transactions for the Transaction Type on the Business Date and the same Void Flag setting.
- **Average Amount** - The Activity Amount / the Transaction Count.
- **Totals for Transaction Type**:
  - **Transaction Count** - The total of the Transaction Counts for the Transaction Type.
  - **Activity Amount** - The total value of Activity Amounts for the Transaction Type.
  - **Average Amount** - The total Activity Amount / the total Transaction Count for the Transaction Type.
- **Totals for Program**:
  - **Transaction Count** - The total of the Transaction Counts for the Program.
  - **Activity Amount** - The total value of Activity Amounts for the Program.
  - **Average Amount** - The total Activity Amount / the total Transaction Count for the Program.
- **Report Totals**:
  - **Transaction Count** - The total value of Transaction Counts on the report.
  - **Activity Amount** - The total value of Activity Amounts on the report.
  - **Average Amount** - The total Activity Amount / the total Transaction Count on the report.

Registry Management Reports

The Registry Management Reports include:

- Registry Detail Report

Registry Detail Report

This report presents detailed information for Gift Registries or Wish Lists.

Selection Criteria

- **Customer ID / Name** - The ID and Name identifying a Customer. All Customers are selected by default. Optionally, select Search to work with the list of eligible Customers, search based on Customer Name, or remove Customers from the list selected for the report. Only Customers selected with a Gift Registry or Wish List are available for selection.

  After you make a Customer ID / Name selection, clear the Registry ID that is automatically selected as a result and reset Program Level IDs as needed.
- **Registry Type** - The type of Registry: Gift Registry or Wish List. Both types are selected by default. Optionally, remove a type or Registry to exclude it from the report.

  After you make a Registry Type selection, clear the Registry ID / Name that is automatically selected as a result and reset Registry IDs as needed.
- **Registry ID / Name** - The ID and Name identifying a Gift Registry or Wish List. All Registries and Wish Lists are selected by default. Optionally, select Search to work with the list of Registries and Wish Lists, search based on Registry or Wish List Name, or remove Registries or Wish Lists from the list selected for the report.

- **Registry Event Date Range** - Optionally, select a time period to include Gift Registries scheduled during this period or Wish Lists created during this period on the report rather than entering an Registry Event Start Date or Registry Event End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

> **Note:**
>
> Gift Registries scheduled for future dates are not included in any of these time periods. To include Gift Registries for future dates, use the Registry Event Start Date and Registry Event End Date options to select a date range that includes the scheduled date for the future Gift Registry.
>
> If you select a Registry Event Time Period, the Registry Event Start Date and Registry Event End Date criteria are ignored.

- **Registry Event Start Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **Registry Event End Date** - The last date to include on the report. Defaults to the current date (today).
- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of items for all Registries for the entire report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.
- **Customer ID** - The numeric ID for the Customers selected when generating the report. Set to ALL if there was no restriction.
- **Registry ID** - The numeric ID for the Registries or Wish Lists selected when generating the report. Set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Primary Customer ID** - The unique numeric identifier for a Customer.
- **Registry ID** - Name - The unique numeric identifier for a Registry or Wish List, and the Name describing the Registry or Wish List.
- **Event Date** - The date for an Item Registry. Set to N/A for a Wish List. Repeated for each Item for the Registry.
- **Venue Name and Venue Address** - The Venue Name and Address for an Item Registry. Set to N/A for a Wish List. Repeated for each Item for the Registry.
- **First Name and Last Name** - The primary Customer's first and last name. Repeated for each Item for the Registry or Wish List.
- **Email Address and Phone Number** - The primary Customer's email address and phone number, as specified for the Registry or Wish List. Not from the current primary email address and phone from the Customer record. Set to N/A if not specified.
- **Address** - The primary Customer's address, as specified for the Registry or Wish List. Not from the current primary address from the Customer record. Set to N/A if not specified.
- **Item ID** - Name - The ID and Name of the Item on the Registry or Wish List.
- **Desired Quantity** - The desired quantity of the Item.
- **Purchased Quantity** - The purchased quantity of the Item.
- **Totals for Registry**:
  - **Desired Quantity** - The total desired quantity of all Items on the Registry or Wish List that are included on the report.
  - **Purchased Quantity** - The total purchased quantity of all Items on the Registry or Wish List that are included on the report.
- **Report Totals**:
  - **Desired Quantity** - The total desired quantity of all Items included on the report.
  - **Purchased Quantity** - The total purchased quantity of all Items included on the report.

Task Management Reports

The Task Management Reports include:

- Associate Task Details Report
- Associate Task Summary Report
- Task Status Summary Report

Associate Task Details Report

This report presents details on customer targeted tasks, by the associate assigned to them.

Selection Criteria

- **Location ID / Name** - The ID and Name identifying a retail Location where Tasks might be assigned. All Locations are selected by default. Optionally, select Search to work with the list of eligible Locations, search based on Location Name, or remove Locations from the list selected for the report.

If you select a Location ID, additional criteria may be selected automatically. If needed, set any remaining criteria to All to avoid restricting the report results to those that match the automatically selected criteria.

- **Task Type** - Codes identifying types of Tasks. All Task Types are selected by default. Optionally, select Search to work with the list of eligible Task Types, search based on Task Type, or remove Task Types from the list selected for the report. Task Types include:
  - ADMIN
  - APPOINTMENT
  - EVENT
  - TASK
  - TODO
- **Associate ID / Name** - The user ID and name of the Associate assigned to the Task. All Associates are selected by default. Optionally, select Search to work with the list of eligible Associates, search based on Associate Name, or remove Associates from the list selected for the report.
- **Task Time Period** - Optionally, select a time period to include Tasks scheduled for dates in this period on the report rather than entering a Start Segment Run Date or End Segment Run Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week (excludes future dates)
  - This Month (excludes future dates)
  - This Year (excludes future dates)

> **Note:**
>
> If you select a Task Time Period, the Task Start Date and Task End Date criteria are ignored.

- **Task Start Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **Task End Date** - The last date to include on the report. Defaults to the current date (today).
- **Row Limit** - Optionally, use this field to specify the maximum number of Tasks to include on the report.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.
- **Location ID** - The Location IDs, if any, selected when generating the report. Set to ALL if there was no restriction.
- **Task Type** - The Task Types, if any, selected when generating the report. Set to ALL if there was no restriction.
- **Associate ID** - The Associate IDs, if any, selected when generating the report. Set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Task ID** - A unique numeric identifier for the Task.
- **Task Status** - The current status of the Task. Possible statuses are:
  - Open
  - In Progress
  - Cancelled
  - Closed
- **Task Priorit**y - The priority of the Task. Possible priorities are:
  - Low
  - Medium
  - High
- **Task Loc ID** - The unique numeric identifier for the Location, if any, associated with the Task. Otherwise, set to N/A.
- **Task Subject** - The Subject entered to describe the Task.
- **Task Start Date** - The Start Date specified for the Task.
- **Task End Date** - The End Date specified for the Task.
- **Customer ID** - The unique numeric identifier for the Customer. Set to N/A if there is no Customer associated with the Task.
- **Create Date** - The date when the Task was created.
- **Update Date** - The date when the Task was most recently updated. Set to N/A if the Task has not been updated.
- **Create User** - The user ID of the User who created the Task.
- **Update User** - The user ID of the User who most recently updated the Task. Set to N/A if the Task has not been updated.

Associate Task Summary Report

This report presents a summary of the types of Tasks assigned to each Associate, and their current statuses.

Selection Criteria

- **Location ID / Name** - The ID and Name identifying a retail Location that might be associated with assigned Tasks. All Locations are selected by default. Optionally, select Search to work with the list of eligible Locations, search based on Location Name, or remove Locations from the list selected for the report.
- **Task Type** - Codes identifying types of Tasks. All Task Types are selected by default. Optionally, select Search to work with the list of eligible Task Types, search based on Task Type, or remove Task Types from the list selected for the report. Task Types include:
  - ADMIN
  - APPOINTMENT
  - EVENT
  - TASK
  - TODO
- **Associate ID / Name** - The user ID and name of the Associate assigned to the Task. All Associates are selected by default. Optionally, select Search to work with the list of eligible Associates, search based on Associate Name, or remove Associates from the list selected for the report.
- **Task Time Period** - Optionally, select a time period to include Tasks scheduled for dates in this period on the report rather than entering a Start Segment Run Date or End Segment Run Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week (excludes future dates)
  - This Month (excludes future dates)
  - This Year (excludes future dates)

> **Note:**
>
> If you select a Task Time Period, the Task Start Date and Task End Date criteria are ignored.

- **Task Start Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **Task End Date** - The last date to include on the report. Defaults to the current date (today).
- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. Each row represents a unique combination of Task Type, Associate ID, and Task Status.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.
- **Date Range** - The date range selected when generating the report.
- **Location ID** - The Location IDs, if any, selected when generating the report. Set to ALL if there was no restriction.
- **Task Type** - The Task Types, if any, selected when generating the report. Set to ALL if there was no restriction.
- **Associate ID** - The Associate IDs, if any, selected when generating the report. Set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Task Type** - The type of Task. Possible Types are:
  - Admin
  - Appointment
  - Event
  - Task
  - To do
- **Associate ID** - The identifier of the Associate assigned to the Task. Set to N/A if no Associate is assigned.
- **Associate Name** - The name of the Associate assigned to the Task. Set to N/A if no Associate is assigned.
- **Task Status** - The current status of the Task. Possible statuses are:
  - Open
  - In Progress
  - Cancelled
  - Closed
- **Task Count -** The total number of Tasks of this Type, assigned to this Associate (or unassigned), and in the same status, included on the report.
- **Totals for Task Type -** The total number of Tasks of this Type included on the report.
- **Report Totals** - The total number of Tasks included on the report.

Task Status Summary Report

This report presents a summary of types of Tasks by their current statuses.

Selection Criteria

- **Location ID / Name -** The ID and Name identifying a retail Location that might be associated with assigned Tasks. All Locations are selected by default. Optionally, select Search to work with the list of eligible Locations, search based on Location Name, or remove Locations from the list selected for the report.

- **Task Type** - Codes identifying types of Tasks. All Task Types are selected by default. Optionally, select Search to work with the list of eligible Task Types, search based on Task Type, or remove Task Types from the list selected for the report. Task Types include:
  - ADMIN
  - APPOINTMENT
  - EVENT
  - TASK
  - TODO
- **Associate ID / Name** - The user ID and name of the Associate assigned to the Task. All Associates are selected by default. Optionally, select Search to work with the list of eligible Associates, search based on Associate Name, or remove Associates from the list selected for the report.
- **Task Time Period** - Optionally, select a time period to include Tasks scheduled for dates in this period on the report rather than entering a Start Segment Run Date or End Segment Run Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week (excludes future dates)
  - This Month (excludes future dates)
  - This Year (excludes future dates)

> **Note:**
>
> If you select a Task Time Period, the Task Start Date and Task End Date criteria are ignored.

- **Task Start Date** - The first date to include on the report. Defaults to the previous date (yesterday).
- **Task End Date** - The last date to include on the report. Defaults to the current date (today).
- **Row Limit** - Optionally, use this field to specify the maximum number of rows to include on the report. Each row represents a unique combination of Task Type and Task Status.

Click **Apply** to apply the selected criteria and generate the report.

Report Contents

The Report Contents header information includes:

- **Organization** - The code identifying your organization.

- **Date Range** - The date range selected when generating the report.
- **Location ID** - The Location IDs, if any, selected when generating the report. Set to ALL if there was no restriction.
- **Associate ID** - The Associate IDs, if any, selected when generating the report. Set to ALL if there was no restriction.
- **Task Type** - The Task Types, if any, selected when generating the report. Set to ALL if there was no restriction.

The Report Contents detail information includes:

- **Task Type** - The type of Task. Possible Types are:
  - Admin
  - Appointment
  - Event
  - Task
  - To do
- **Task Status** - The current status of the Task. Possible statuses are:
  - Open
  - In Progress
  - Cancelled
  - Closed
- **Task Count** - The total number of Tasks of this Type and status that are included on the report.
- **Totals for Task Type** - The total number of Tasks of this Type included on the report.
- **Report Totals -** The total number of Tasks included on the report.

14 Administration

About this Chapter

The Administrative options available include the following:

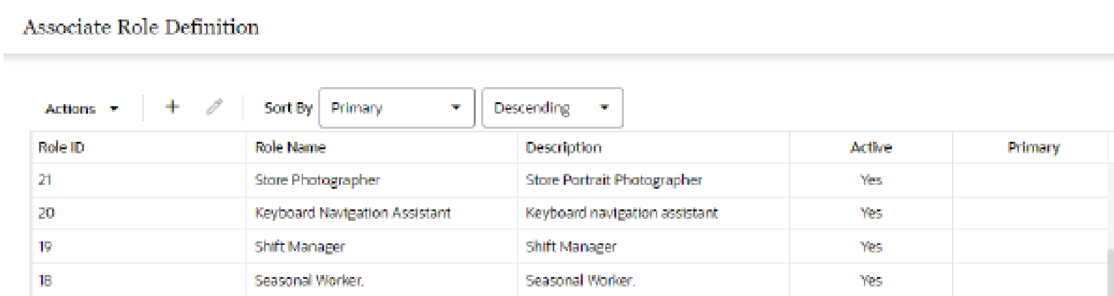
- Associate Role Definition
  - Adding an Associate Role
  - Editing an Associate Role
- Attribute Management
  - Creating an Attribute
  - Editing an Attribute
  - Deleting an Attribute
- Batch Import Review
- Batch Process Tracking
- Exchange Rate
- File Review
- Franchisees
- Location Management
  - Adding a Location
  - Editing a Location
- Managing External Application Access
- Preference Types
  - Sorting Preference Types
  - Adding a Preference Type
  - Editing a Preference Type
  - Viewing a Preference Type
  - Delete a Preference Type
- Role Groups
- Security Groups
- System Configuration
- System Logs
- Task Management
  - Creating a Task

- Editing a Task
  - Viewing a Task
  - Reassigning a Task
- Web Service Tracking
- Users

Associate Role Definition

Associate Roles are used to assign Associates to Customers. Only one Associate can be assigned to a Customer for each Associate Role, so the number of Associate Roles determines the number of Associates that can be assigned to a Customer.

Figure 14-1 Associate Role Definition



To access the Association Role Definition window:

1. Click the **Tasks** icon.
2. Click the **Admin** Task.
3. Click the **Associate Role Definition** Task.

The following information is displayed for each role:

- **Role ID** – Unique ID for the Associate Role.
- **Role Name** – Name of the Associate Role.
- **Description** – Description of the Associate Role.
- **Active** – Indicates whether the Associate Role is active.
- **Primary** – Indicates whether the Associate Role is the primary role.

Sorting Associate Role Definitions

The user can sort the list to refine the results. The following sorting options include:

The following fields can be sorted **Ascending** or **Descending**:

- **Active** – Indicates whether the Associate Role is active.
- **Description** – Description of the Associate Role.
- **Primary** – Indicates whether the Associate Role is the primary role.
- **Role ID** – Unique ID for the Associate Role.

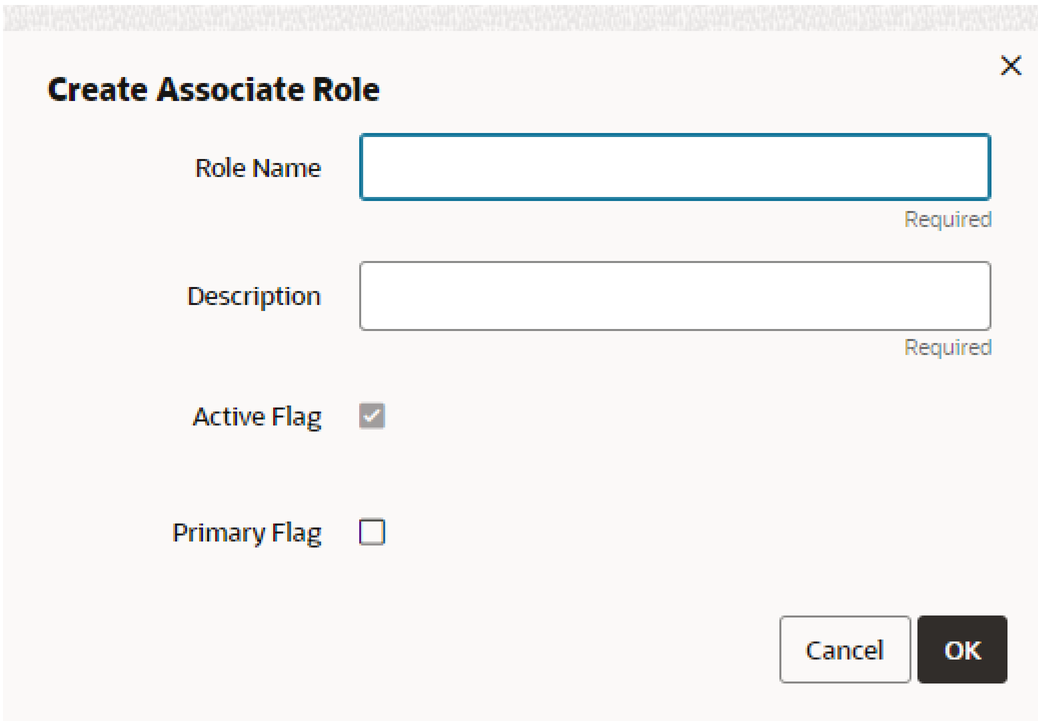
- **Role Name** – Name of the Associate Role.

Adding an Associate Role

To add an Associate Role, do the following:

1. Click the **Add (+) icon**, or choose **Add** from the **Actions** menu. This displays a Create Associate Role window where you can enter the following information:

   Figure 14-2 Adding an Associate Role

   - **Role Name** - This field configures the name of the Associate Role.
   - **Description** - This field configures a description of the Associate Role. This is a required field.
   - **Active** - This check box determines whether the Associate Role is active. As a default, the check box is selected.
   - **Primary** - This check box determines whether the Associate Role is the primary role.

   > **Note:**
   >
   > Customer Engagement only allows one Associate Role to be primary.

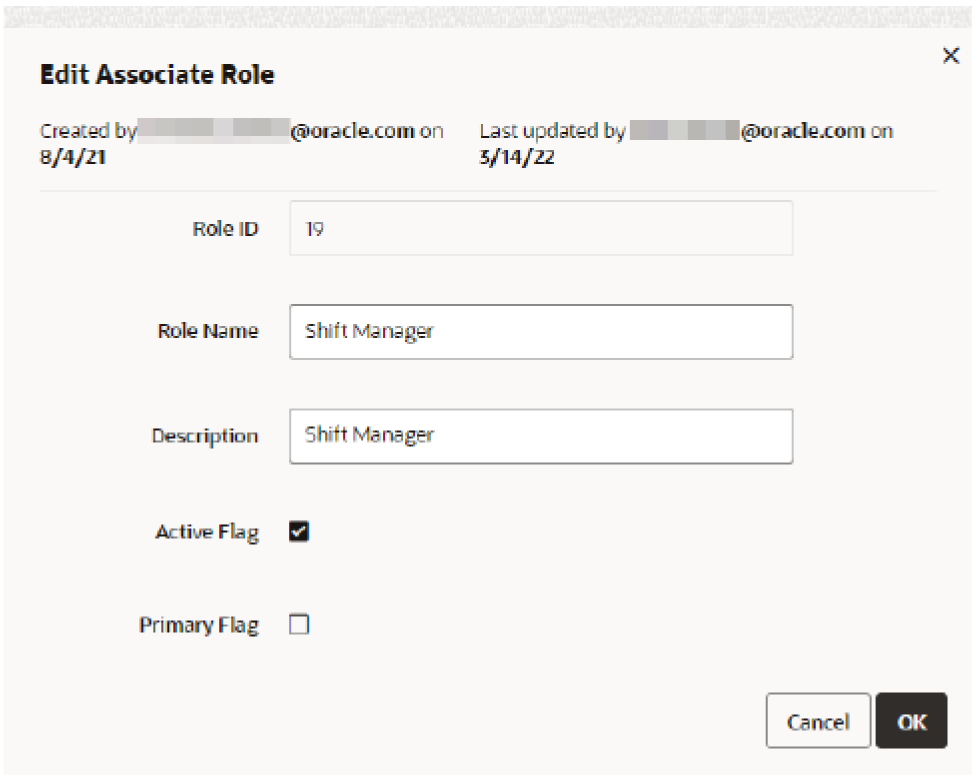
2. To add the new Associate Role to the list of definitions, click **OK**. To return to the original window without saving, click **Cancel**.

Editing an Associate Role

To edit an Associate Role, do the following:

1. Highlight the desired **Associate Role** (Only one record can be selected at a time for editing).
2. Click the **Edit** icon, or choose **Edit** from the **Actions** menu. This displays an Edit Associate Role window: This displays a window with details of the role:

Figure 14-3 Edit Associate Role

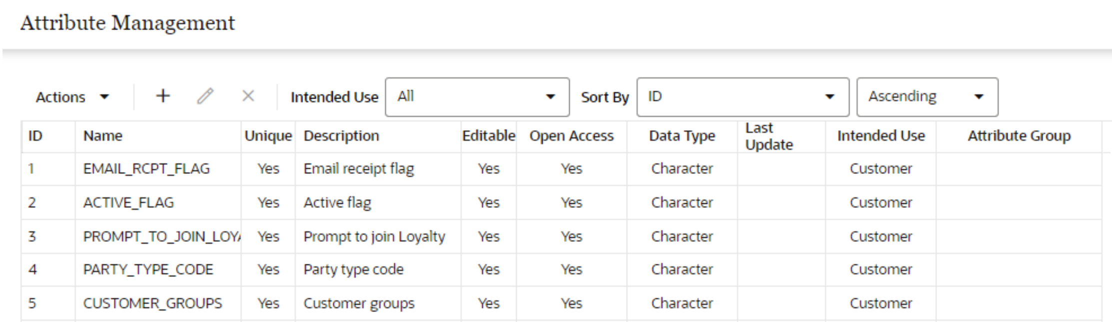


3. Make any necessary change to the fields.
4. Click **OK** to accept the changes. The Associate Role is displayed with the new information. Click **Cancel** to return to the original window without saving.

Attribute Management

Use the Attribute Management window to create, edit, or delete attributes.

Figure 14-4 Attribute Management



ID	Name	Unique	Description	Editable	Open Access	Data Type	Last Update	Intended Use	Attribute Group
1	EMAIL_RCPT_FLAG	Yes	Email receipt flag	Yes	Yes	Character		Customer	
2	ACTIVE_FLAG	Yes	Active flag	Yes	Yes	Character		Customer	
3	PROMPT_TO_JOIN_LOY/	Yes	Prompt to join Loyalty	Yes	Yes	Character		Customer	
4	PARTY_TYPE_CODE	Yes	Party type code	Yes	Yes	Character		Customer	
5	CUSTOMER_GROUPS	Yes	Customer groups	Yes	Yes	Character		Customer	

To access the Attribution Management window:

1. Click the **Tasks** icon.
2. Click the **Admin** Task.
3. Click the **Attribute Management** Task.

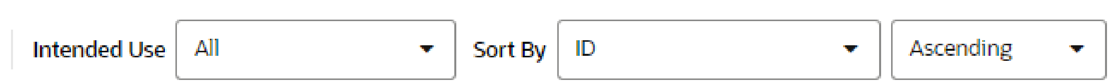
The following information is displayed for each attribute:

- **ID** – The ID for the attribute.
- **Name** – The name of the attribute.
- **Unique** – Only one value can be added to the attribute when it is identified as unique.
- **Description** – Description of the information provided by the attribute.
- **Editable** – Identifies whether the associate is allowed to edit the value for the attribute once it is added.
- **Open Access** – Indicates whether there is open access to this attribute.
- **Data Type** – The type of data contained in the attribute value. Possible values include: Character, Number, Currency, Date, Logical, and List.
- **Last Update** – The date last updated in the system.
- **Intended Use** – The Customer Engagement element the attribute was created for. Possible uses include: Card, Card Series, Card Type, Customer, Gift Registry, Item Location, Offer, Promo Offer, Promotion, Segment, and Wish List.
- **Attribute Group** – The group associated with the attribute.

Filtering and Sorting Attributes

The user can narrow down the list by selecting any of the Intended Use filters. The list can then be sorted by the fields as shown in Figure 14-5.

Figure 14-5 Filtering and Sorting Options



Intended Use filters include:

- All (Default)
- Card
- Card Series
- Card Type
- Customer
- Gift Registry
- Item Location
- Offer
- Promo Offer
- Promotion
- Segment
- Wish List

The following fields can be sorted **Ascending** or **Descending**:

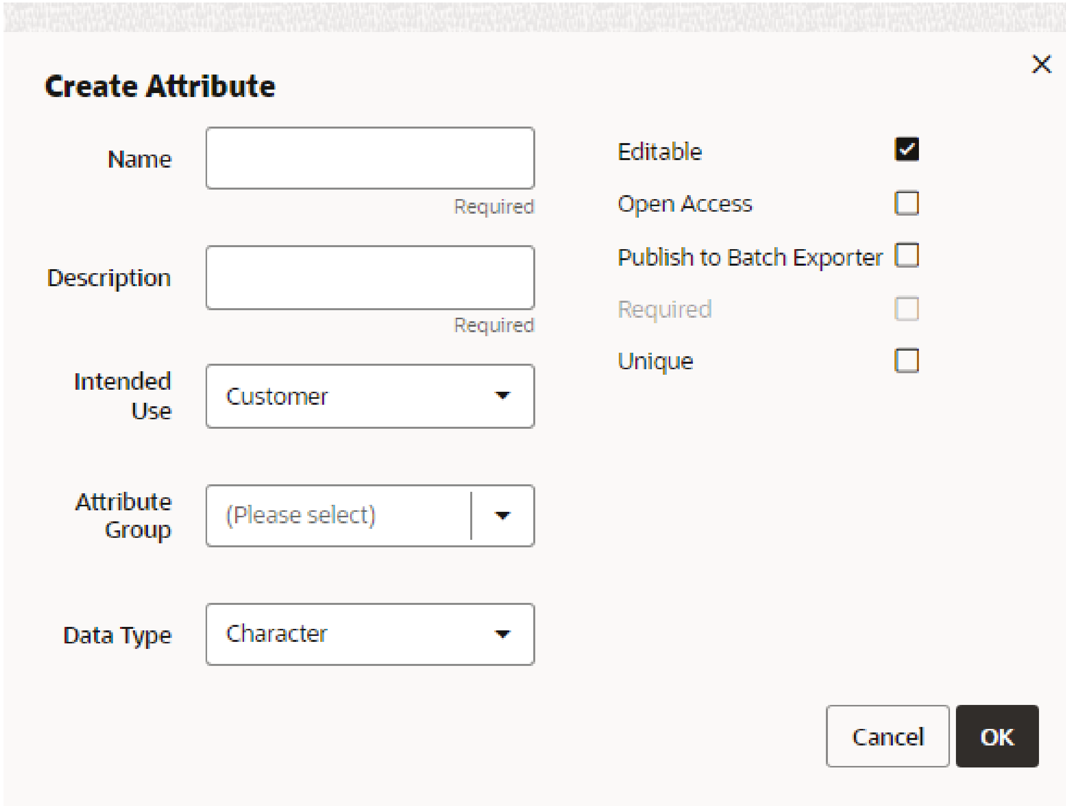
- Attribute Group
- Data Type
- Description
- ID
- Intended Use
- Last Update
- Name

Creating an Attribute

To create an Attribute, do the following:

1. Click the **Add (+) icon,** or choose **Add** from the **Actions** menu. This displays a Create Attribute dialog, where you can enter the following information:

Figure 14-6 Create Attribute



- Attribute

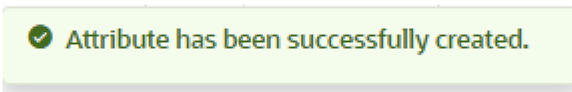
  Name – Name of the attribute (required field).
- **Description** – Description of the attribute (required field).
- **Intended Use** – The Customer Engagement element the attribute was created for (required field).
- **Attribute Group** – The group associated with the attribute. Required for Gift Registry Intended Use, otherwise, optional.
- **Data Type** – The type of data contained in the attribute value. Possible values include:
  - Character
  - Number
  - Currency
  - Date
  - Logical
  - List (required field

2. Depending on your previous selections the following fields are dynamic:
   - **Editable** – Indicate whether the attribute isis editable.
   - **Open Access** – Indicate whether the attribute has open access.
   - **Publish to Batch Exporter** – A flag to indicate export to a marketing system.

- **Required** – Adds a flag to make the attribute required
- **Unique** – Indicates whether the attribute can be assigned to an element more than once.

3. Click **OK**. This adds the new attribute to the list of attributes. Click **Cancel** to return to the original window without saving.

Figure 14-7 Confirmation Notification



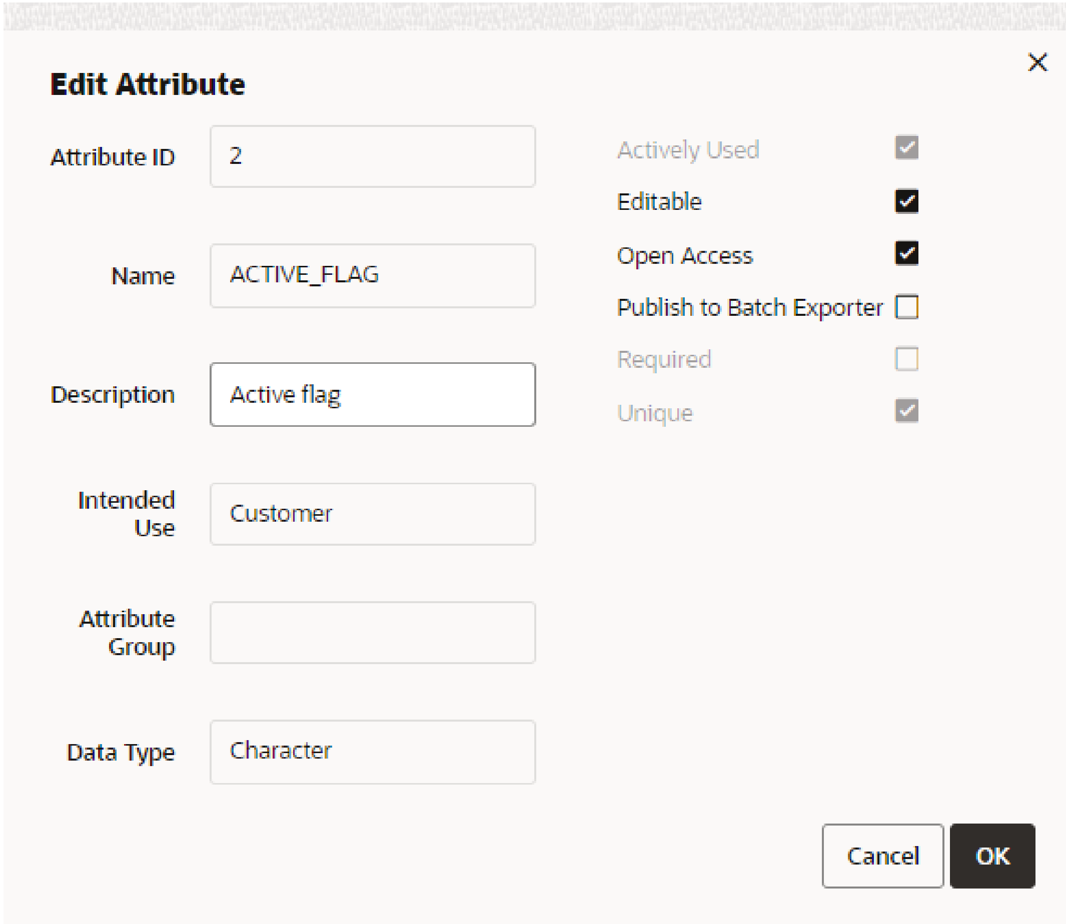
> **Note:**
>
> A confirmation notification appears to confirm the attribute has been created.

Editing an Attribute

To edit an Attribute, do the following:

1. Highlight the **row** of the desired attribute.
2. Click the **Edit** icon, or choose **Edit** from the **Actions** menu. This displays an Edit Attribute dialog that displays a window with details of the attribute:

Figure 14-8 Edit Attribute



> **Note:**
>
> Attributes that are actively used (already associated to an element in Customer Engagement) are limited to what fields may be changed, such as Description.

3. Make any necessary changes to the fields.
4. Click **OK** to accept the changes. The attribute is displayed with the new information. Click **Cancel** to return to the original window without saving.

Deleting an Attribute

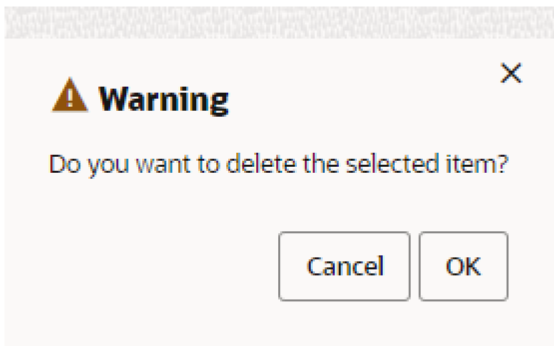
Use the following steps to delete an Attribute:

1. Highlight the row of the Attribute.

> **Note:**
>
> Actively used attributes cannot be deleted, so highlighting such a row will not enable the delete action or the delete icon.

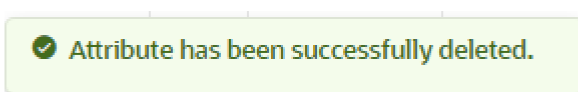
2. Click **Delete** from the **Actions** menu or the **Delete** icon. This opens the delete confirmation window.

Figure 14-9 Warning



3. Click **OK** to delete the attribute or **Cancel** to close the window without deleting the row.

Figure 14-10 Confirmation Notification



> **Note:**
>
> A confirmation notification appears to confirm the attribute has been deleted.

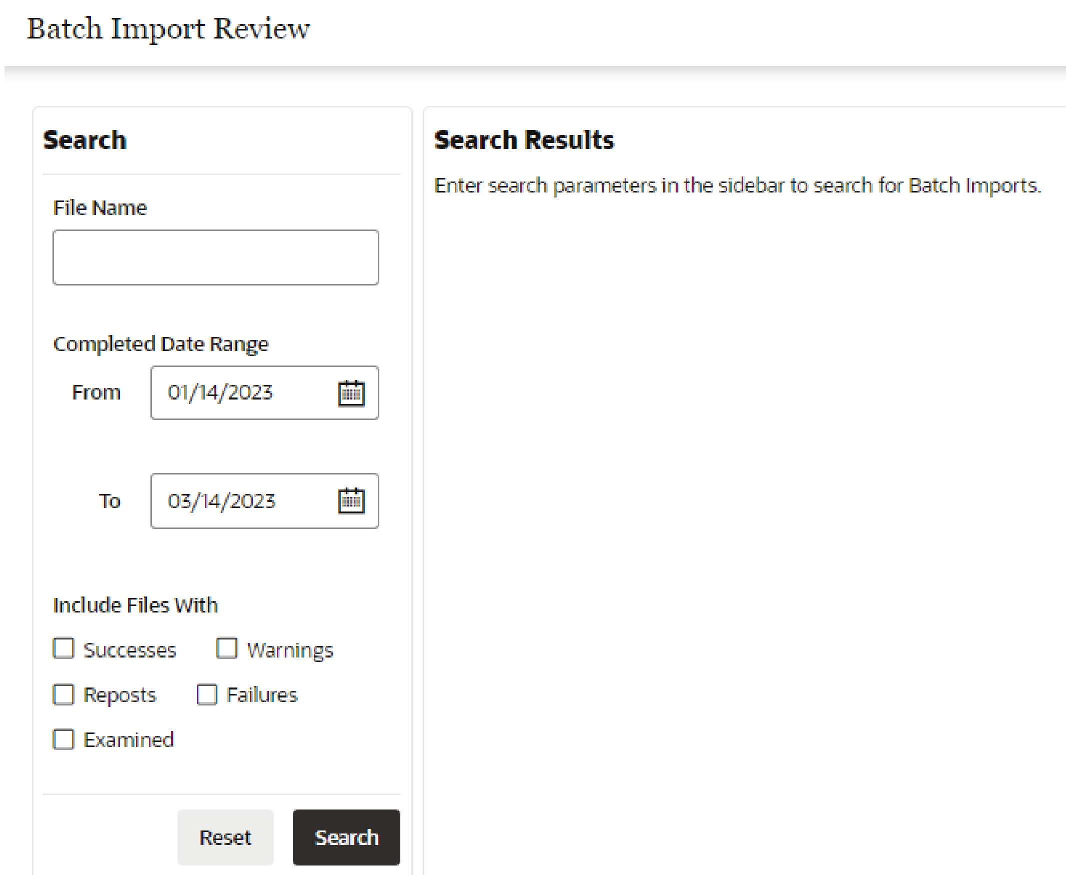
Batch Import Review

You will have the ability to search, sort and view the details of the batch import file. Additionally, files currently being processed can also be viewed.

Searching for Batch Imports

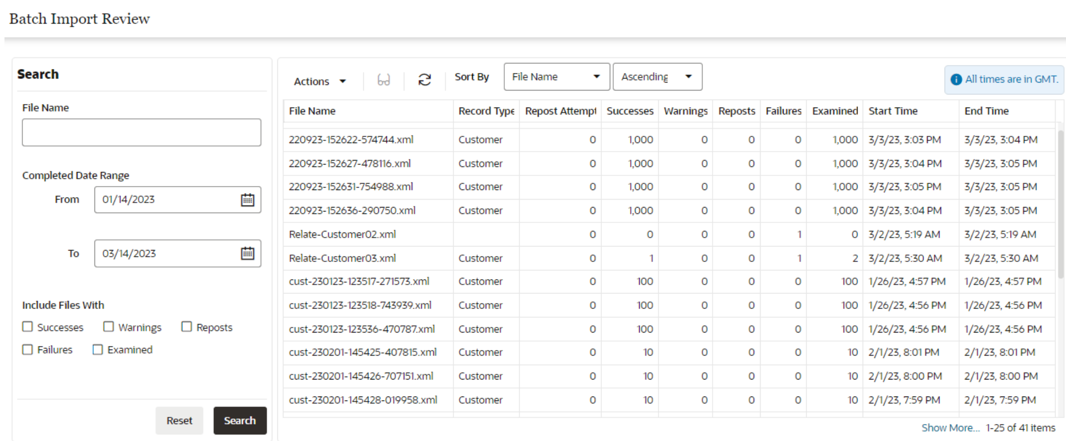
1. Click **Tasks**.
2. Click **Admin**.
3. Click **Batch Import Review**. The Batch Import Review window opens.

Figure 14-11 Batch Import Review - Search



4. Enter the following **search parameters** to search for Batch Imports.
   - Enter any or all of a File Name.
   - Enter the From and To Completed Date Ranges.
   - Select from the following Includes Files With Options:
     - Successes
     - Reposts
     - Examined
     - Warnings
     - Failures
5. Click **Search** to find the results, or click **Reset** the search parameters.

Figure 14-12 Search Results



You can refresh the Search Results by clicking the **Refresh** icon or picking the **Refresh** option from the **Actions menu**.

Sorting Batch imports

You can sort by:

- End Time
- Examined
- Failures
- File Name (default)
- Record Type
- Repost Attempt
- Reposts
- Start Time
- Successes
- Warnings

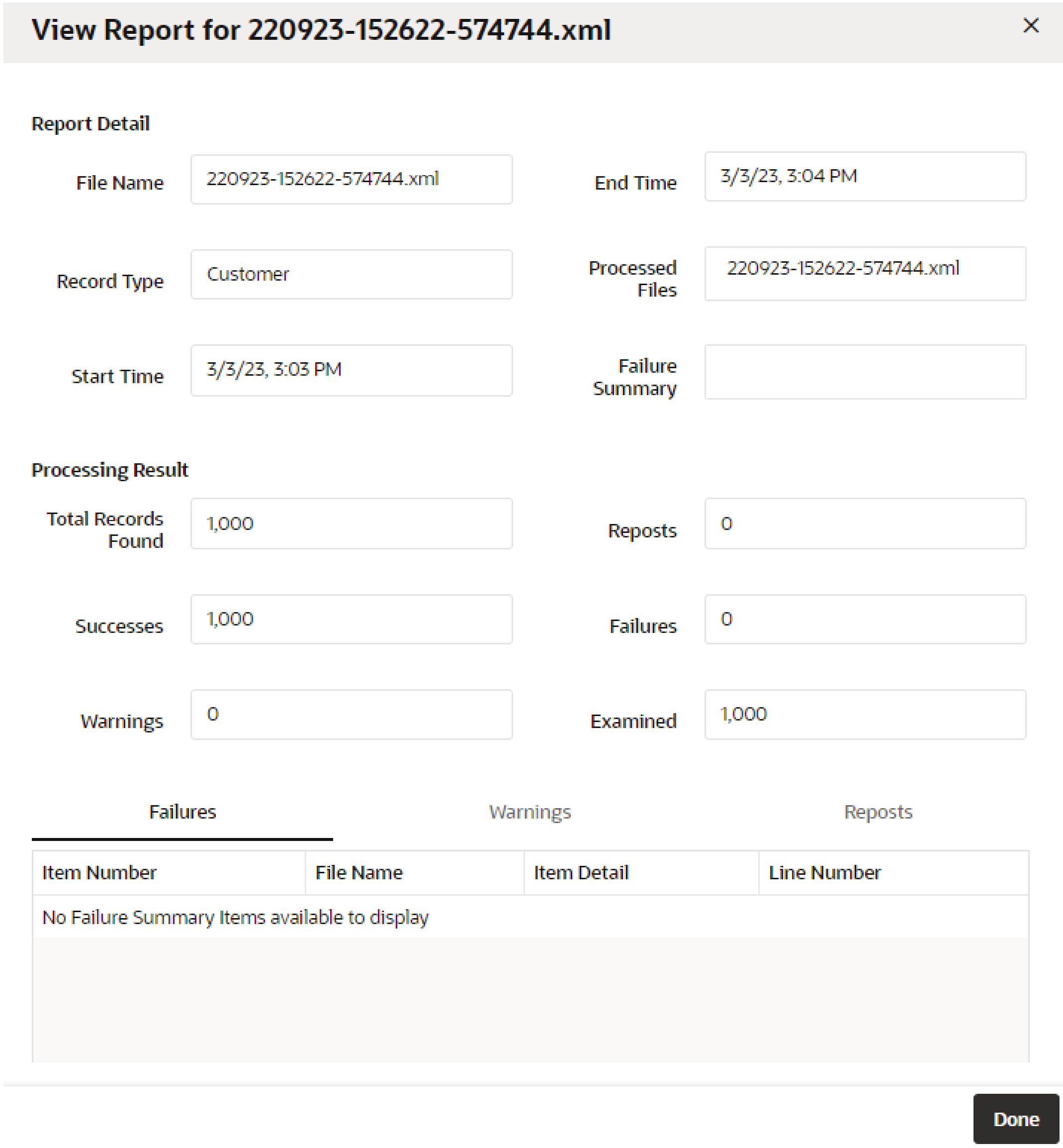
Preference types can be sorted ascending or descending from the list.

Viewing a Batch Import

To view a Batch Import, do the following:

1. Highlight the **row** of the Batch Import you want to view.
2. Click the **Actions** menu or the **View icon** to open the View Report for window.

Figure 14-13 View Report For File Name Selected



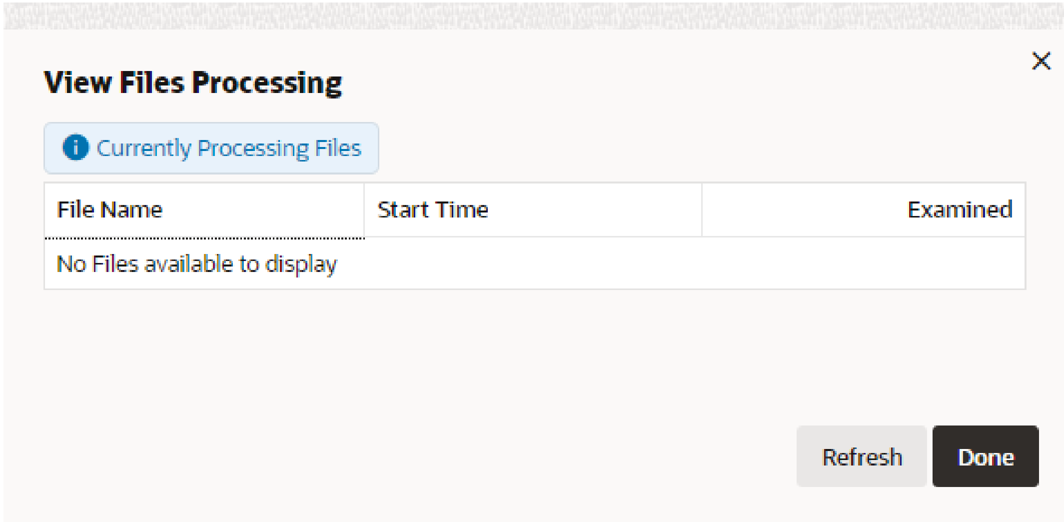
3. View the details of the Report and click **Done** to close the window.

View Files Processing

Do the following to refresh the results at any time:

1. Click the Actions menu.
2. Click View Files Processing. The View Process Files window opens.

Figure 14-14   View Files Processing



3. Click **Refresh** to update the results, or click **Done** to close the window.

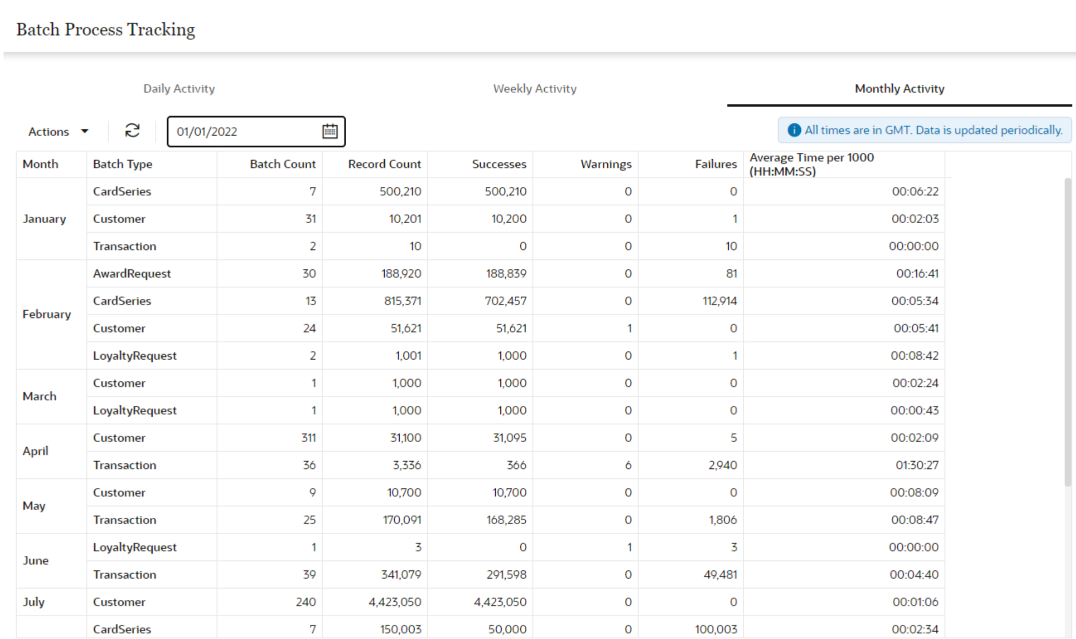
Batch Process Tracking

You have the ability to view statistics for successes, warnings, and failures by batch type on a daily, weekly, and monthly basis, so that you can monitor problems with batch jobs.

To track batch processes do the following:

1. Click **Menu**.
2. Click the **Admin** task.
3. Click the **Batch Process Tracking** task. The Batch Process Tracking window displays.

Figure 14-15   Batch Process Tracking

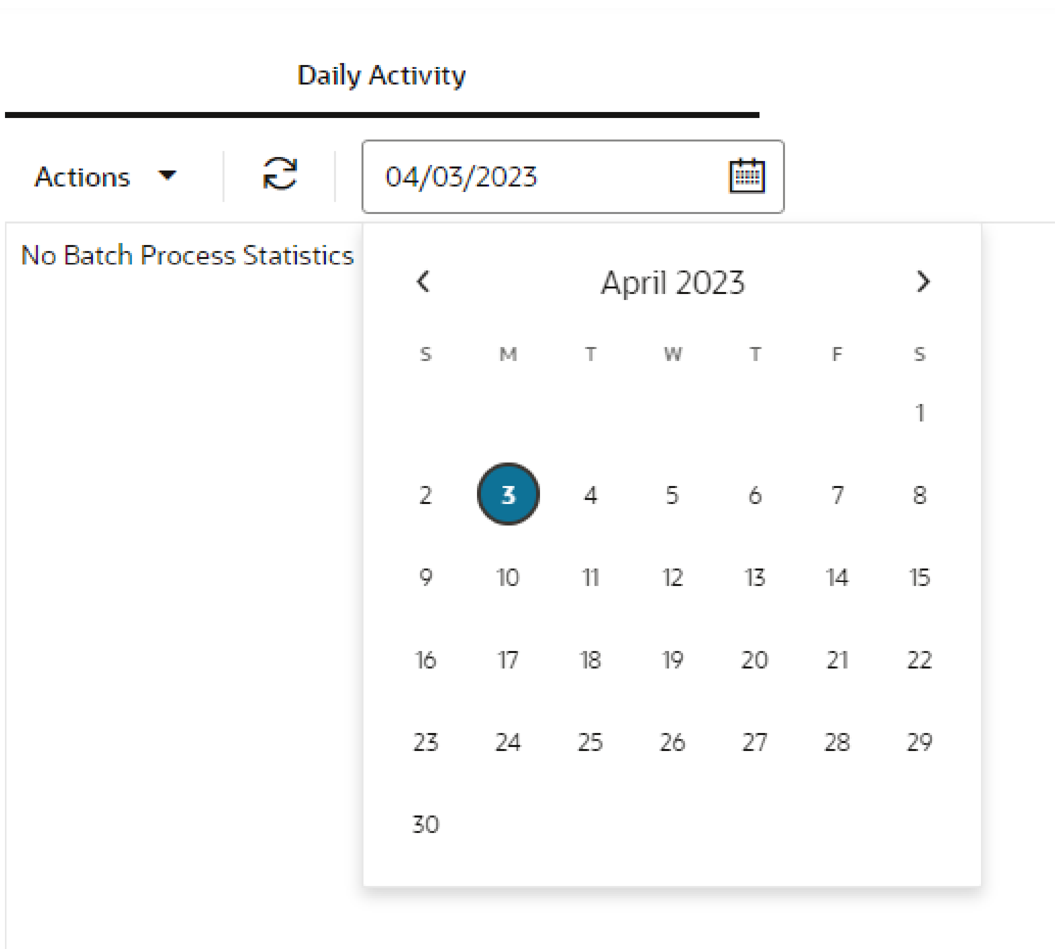


Month	Batch Type	Batch Count	Record Count	Successes	Warnings	Failures	Average Time per 1000 (HH:MM:SS)
January	CardSeries	7	500,210	500,210	0	0	00:06:22
	Customer	31	10,201	10,200	0	1	00:02:03
	Transaction	2	10	0	0	10	00:00:00
February	AwardRequest	30	188,920	188,839	0	81	00:16:41
	CardSeries	13	815,371	702,457	0	112,914	00:05:34
	Customer	24	51,621	51,621	1	0	00:05:41
	LoyaltyRequest	2	1,001	1,000	0	1	00:08:42
March	Customer	1	1,000	1,000	0	0	00:02:24
	LoyaltyRequest	1	1,000	1,000	0	0	00:00:43
April	Customer	311	31,100	31,095	0	5	00:02:09
	Transaction	36	3,336	366	6	2,940	01:30:27
May	Customer	9	10,700	10,700	0	0	00:08:09
	Transaction	25	170,091	168,285	0	1,806	00:08:47
June	LoyaltyRequest	1	3	0	1	3	00:00:00
	Transaction	39	341,079	291,598	0	49,481	00:04:40
July	Customer	240	4,423,050	4,423,050	0	0	00:01:06
	CardSeries	7	150,003	50,000	0	100,003	00:02:34

You can refresh the list by clicking the **Refresh** icon or picking the **Refresh** option from the **Actions menu**.

4. View the Results by clicking one of the following options:
   - Daily Activity
   - Weekly Activity
   - Monthly Activity
5. To change the date range enter a date into the calendar field.

Figure 14-16 Date Selector



Exchange Rate

You can use the Exchange Rate feature to review the most current exchange rates that have been set up for currency conversions for PosLog transactions. You can also review previous Exchange Rates, as well as create new Exchange Rates.

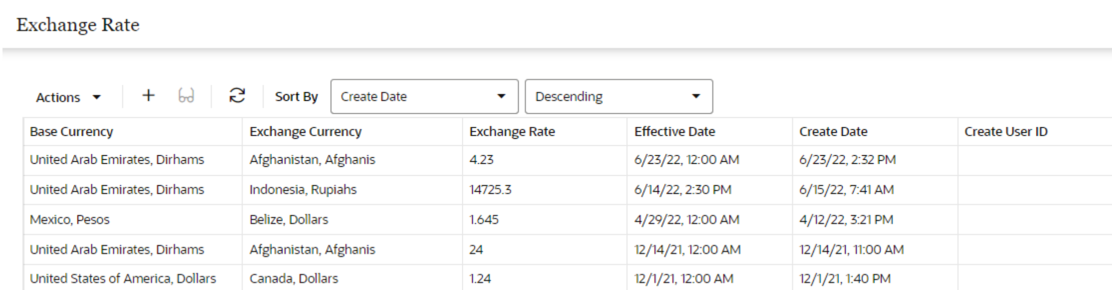
> **Note:**
>
> This option is available only if the user has been assigned the `SystemAdmin` role. See the `Oracle Retail Customer Engagement Cloud Service Implementation Guide` for more information on assigning User Roles.

Accessing the Exchange Rate Feature

To access the Exchange Rate feature do the following:

1. Click **Menu**.
2. Click the **Admin** task.
3. Click the **Exchange Rate** task. The Exchange Rate window displays.

Figure 14-17 Exchange Rate Window



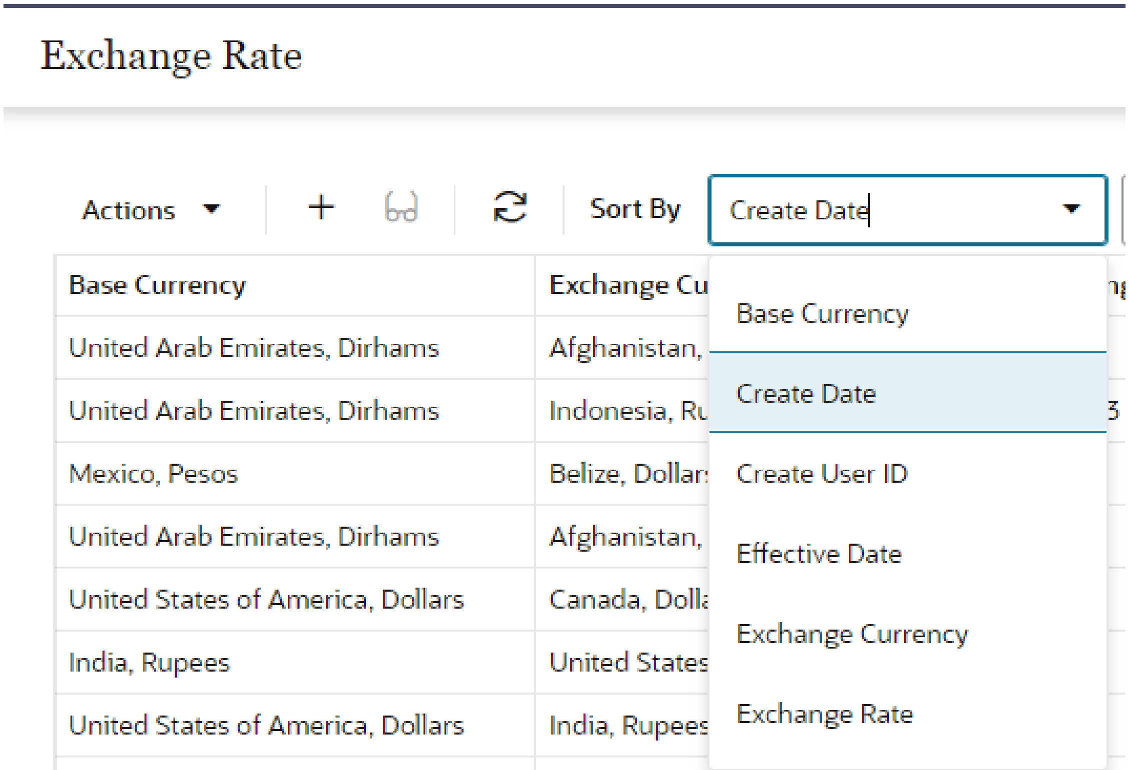
The Exchange Rate List displays the following information for each currency conversion that has a current Exchange Rate:

- **Base Currency** - The name of the currency that is being converted (the from currency).
- **Exchange Currency** - The name of the currency that is being converted to (the to currency).
- **Exchange Rate** - The most current Exchange Rate that has been defined for the currency conversion. Up to 6 decimal positions. Any future Exchange Rates are not displayed.
- **Effective Date** - The most current Exchange Rate that has been defined for the currency conversion, with the rate displaying up to 6 decimal positions. Any Exchange Rates with a future Effective Date are not displayed.
- **Create Date** - The date and time when the Exchange Rate was created.
- **Create User Id** - The user ID of the person who created the Exchange Rate.

Working with Exchange Rates

Sorting Results

Figure 14-18 Sort By Options



In the Exchange Rates window, the user can sort the list to refine the results. Results can be sorted Ascending or Descending using the following sorting options:

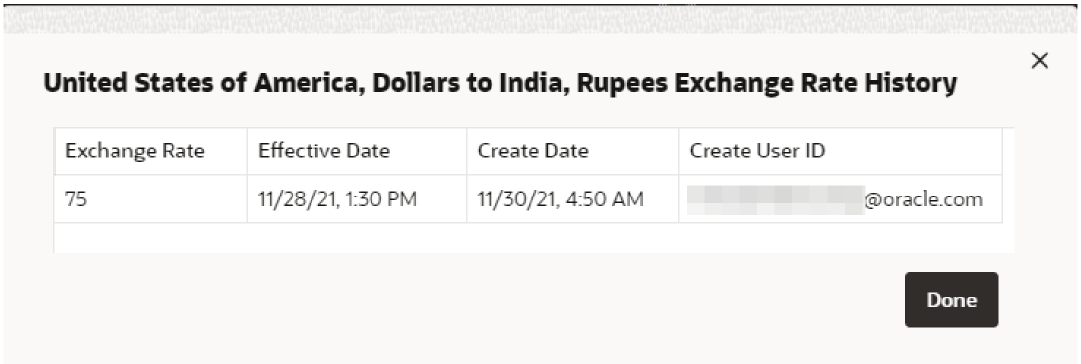
- Base Currency
- Create Date (Default)
- Create User ID
- Effective Date
- Exchange Currency
- Exchange Rate

Viewing Exchange Rate History

To view an Exchange Rate History do the following:

1. Highlight an **Exchange Rate** from the list of results.
2. Click the **Actions Menu**, and then click **View**, or click the **View** icon. The Exchange Rate History window displays the history of that Exchange Rate in descending date order.

Figure 14-19 Exchange Rate History



- **Exchange Rate** - The Exchange Rates defined for the conversion of the Base Currency to the Exchange Currency.
- **Exchange Rate Date** - The date and time when the Exchange Rate becomes effective.
- **Create Date** - The date and time when the Exchange Rate was created.
- **Create User Id** - The user ID of the person who created the Exchange Rate.

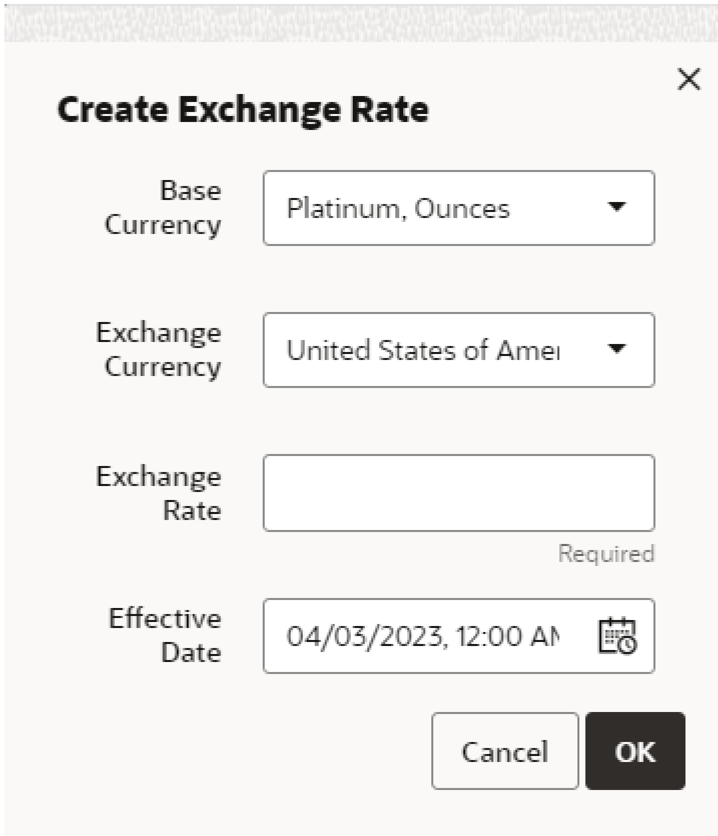
3. Click **Done** to close the window and return to the Exchange Rate Window.

Creating a New Exchange Rate

To create a new Exchange Rate for a currency conversion do the following:

1. Click the **Actions Menu**, and then click **Add**, or Click the **Add (+)** icon. The Create Exchange Rate window displays.

Figure 14-20 Create Exchange Rate



2. Enter the following information:
   - **Base Currency** - Select the basic currency from the list.
   - **Exchange Currency** - Select the Exchange Currency from the list.
   - **Exchange Rate** - Enter the Exchange Rate to use when converting the Base Currency to the Exchange Currency. The value entered can include up to 11 positions before the decimal and up to 6 after.
   - **Effective Date and Time** - Use the Calendar picker to select the date and time which the rate is effective. The date/time can be in the past or in the future. If an existing Exchange Rate for the specified date and time currently exists, the page displays an error.
3. Click **OK** to accept the changes or **Cancel** to close the task without saving. If you select **OK**, you will receive a confirmation at the bottom of the window confirming the new exchange rate was successfully added. You are returned to the Exchange Rate window where the new exchange rate you just created now displays at the top of the list.
4. You can refresh the Exchange Rate list by clicking the **Refresh** icon or picking the **Refresh** option from the **Actions menu**.

File Review

As an Administrator, I want the ability to view files, so that I can manage downloading and transferring of files.

1. Click the **Tasks** icon.

2. Click **Admin**.
3. Click **File Review**.
4. Select either Available Files or Transfer Activity.

Searching for Available Files

In the File Review window select **Available Files**.

- Enter the following **search parameters** to search for Available Files.
  - Select a **File Type**.
  - Enter any or all of a **File Name**.
  - Enter the **From** and **To** Date Ranges.
  - Select whether or not to **Exclude Zero Length Files**.

Click **Search**.

You can refresh the Search Results by clicking the **Refresh** icon or picking the **Refresh** option from the **Actions menu**.

Sorting Available Files

The following fields can be sorted **Ascending** or **Descending**:

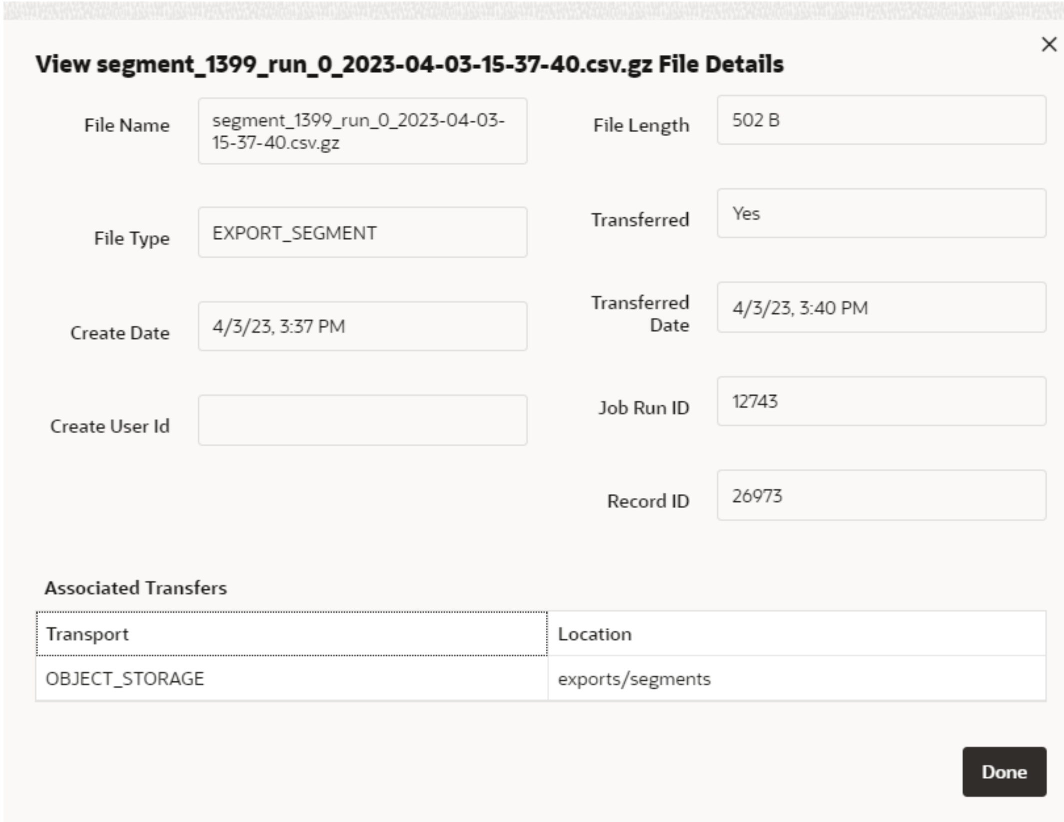
- Create Date
- File Length
- File Name
- File Type
- Job Run ID
- Record ID (default)

Viewing a FIle

To view a File, do the following:

1. Highlight the **row** of the File you want to view.
2. Click the **Actions** menu or the **View icon** to open the View File Details window.

Figure 14-21   View File Details



3. View the details of the file and click **Done** to close the window.

Downloading Files

To download a file do the following:

1. Highlight the **row** of the File you want to download.
2. Click the **Actions** menu and select **Download**, or click the **Download icon** to download the file. The file is downloaded to a location based on your settings.

Transfer to Server

To transfer a file to the server do the following:

1. Highlight the **row** of the File you want to transfer to server.
2. Click the **Actions** menu and select **Transfer to Server**. A notification appears to indicate the transfer is a success.

Figure 14-22   Notification

Searching for Transfer Activity

In the File Review window select **Transfer Activity**.

- Enter the following **search parameters** to search for Transfer Activity.
  - Select a **Transfer Type**.
  - Enter any or all of a **File Name**.
  - Select a **Status**. Options include:
    - All (default)
    - New Entry
    - Waiting
    - Transfer Started
    - Transfer Retry
    - Transfer Failed
    - Completed
    - Historical
    - Discard
  - Select a **Transport** option.

Click **Search**.

You can refresh the Search Results by clicking the **Refresh** icon or picking the **Refresh** option from the **Actions menu**.

Sorting Transfer Activity

The following fields can be sorted **Ascending** or **Descending**:

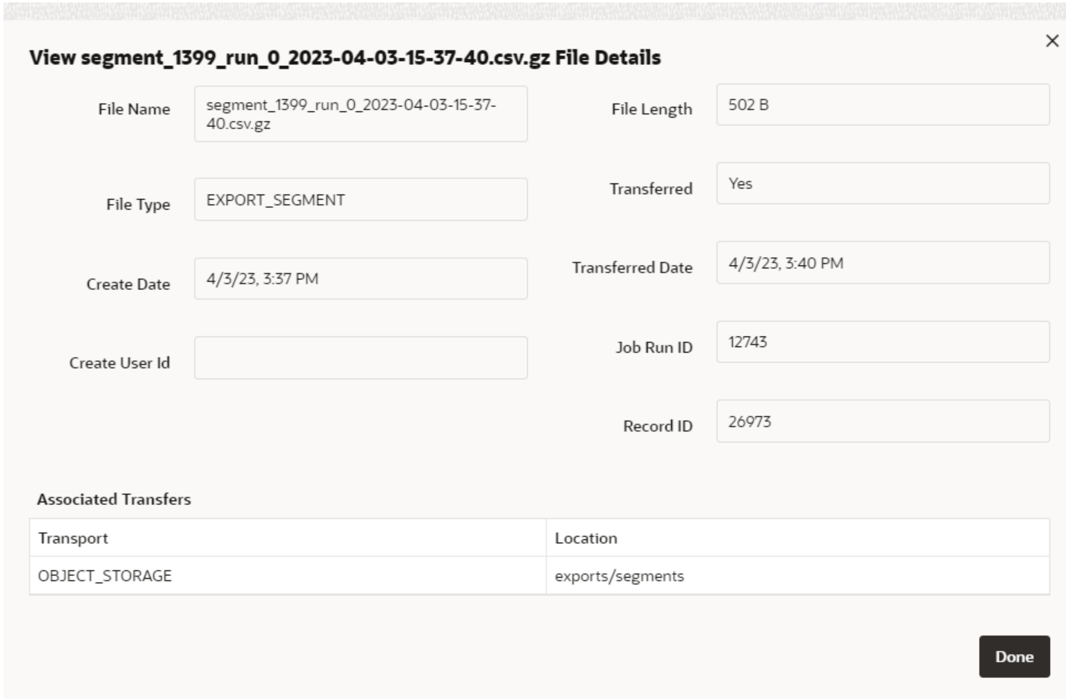
- Attempt
- File Name
- Last Updated (default)
- Message
- Retry
- Status
- Transfer Type
- Transport

Viewing a Transfer Activity

To view a Transfer Activity, do the following:

1. Highlight the **row** of the File you want to view.
2. Click the **Actions** menu or the **View icon** to open the View File Details window.

Figure 14-23 View File Details



3. View the details of the file and click **Done** to close the window.

Retry a Failed Transfer

Only files that have the status of Transfer Failed are eligible for a Retry. Do the following to Retry a Failed Transfer.

1. Highlight the **row** of the File you want to retry.
2. Click the **Actions** menu and select **Retry**, or click the **Retry icon** to retry the transfer.

Franchisees

You have the ability to view, add, edit, and delete a franchisee to be used within the system. Additionally, users and locations can be added and deleted on a franchisee as well as viewing a list of customers that are currently assigned to a franchisee. A list of Franchisees can also be imported.

1. Click the **Tasks** icon.
2. Click **Admin**.
3. Click **Franchisees**.

Searching for Franchisees

Enter the following **search parameters** to search for Franchisees.

- – Enter all or part of a **Franchisee ID**.
  – Enter all or part of a **Name**.
  – Enter all or part of a **Description**.

- Enter all or part of a **City**.
- Enter all or part of a **State**.

Click **Search**.

You can refresh the Search Results by clicking the **Refresh** icon or picking the **Refresh** option from the **Actions menu**.

Sorting Available Franchisees

The following fields can be sorted **Ascending** or **Descending**:

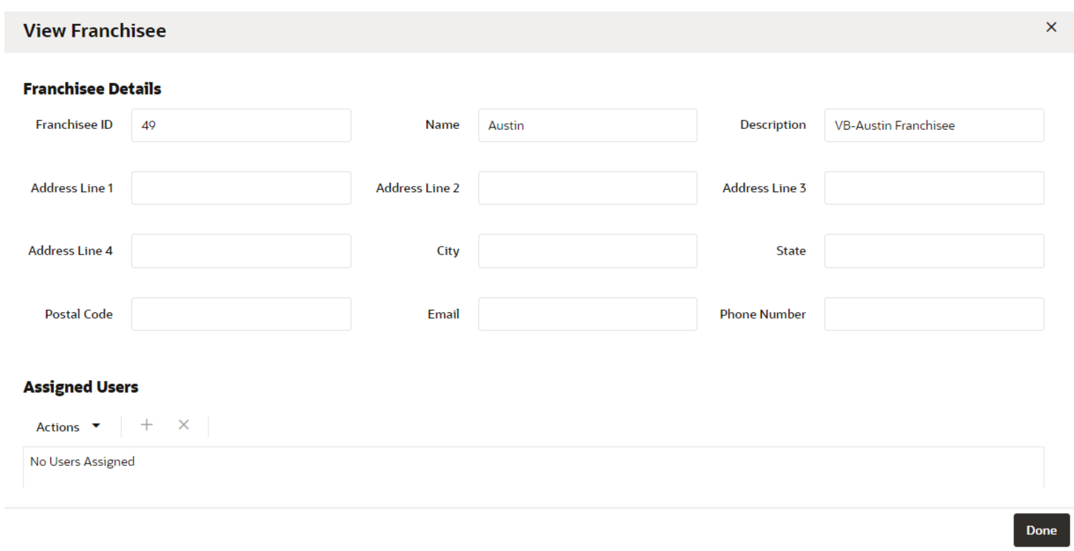
- City
- Description
- Franchisee ID (default)
- Name
- State

Viewing a Franchisee

To view a Franchisee, do the following:

1. Highlight the **row** of the Franchisee you want to view.
2. Click the **Actions** menu or the **View icon** to open the View Franchisee window.

Figure 14-24 View Franchisee



3. View the details of the Franchisee and click **Done** to close the window.

Adding Franchisees

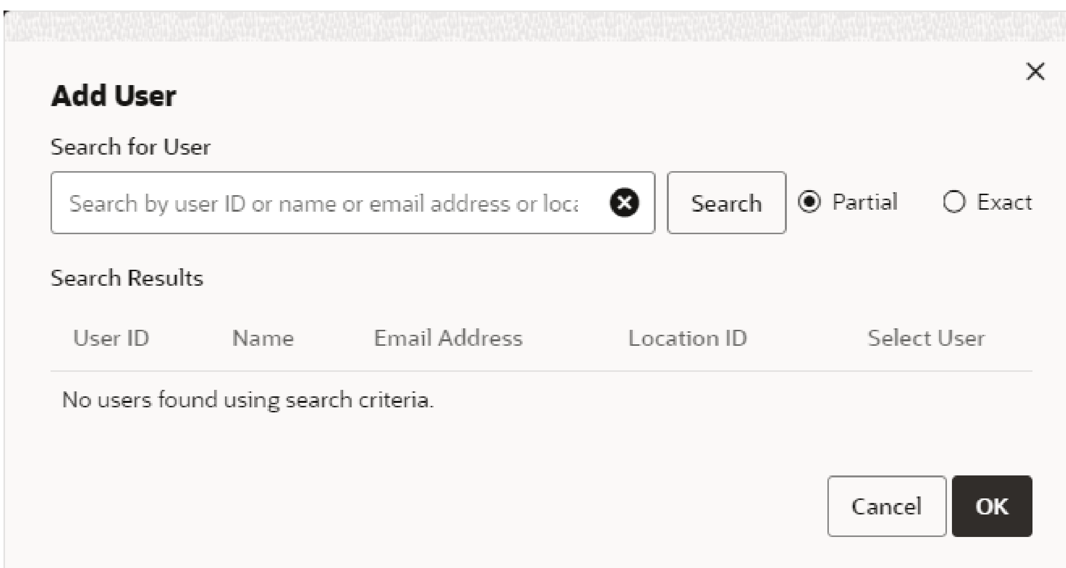
Do the following to add a new Franchisee.

1. Click the **Actions** menu and select **Add**, or click the **Add** icon (**+**).

2. Enter the following information:
   - Franchisee ID (automatically assigned after save)
   - Name
   - Description
   - Address Line 1
   - Address Line 2
   - Address Line 3
   - Address Line 4
   - City
   - State
   - Postal Code
   - Email
   - Phone Number
3. Select **OK** to save or **Cancel** to exit. You do not at this time have to add users. If you wish to associate users to the new Franchisee at this time, then proceed to the Assign Users section.

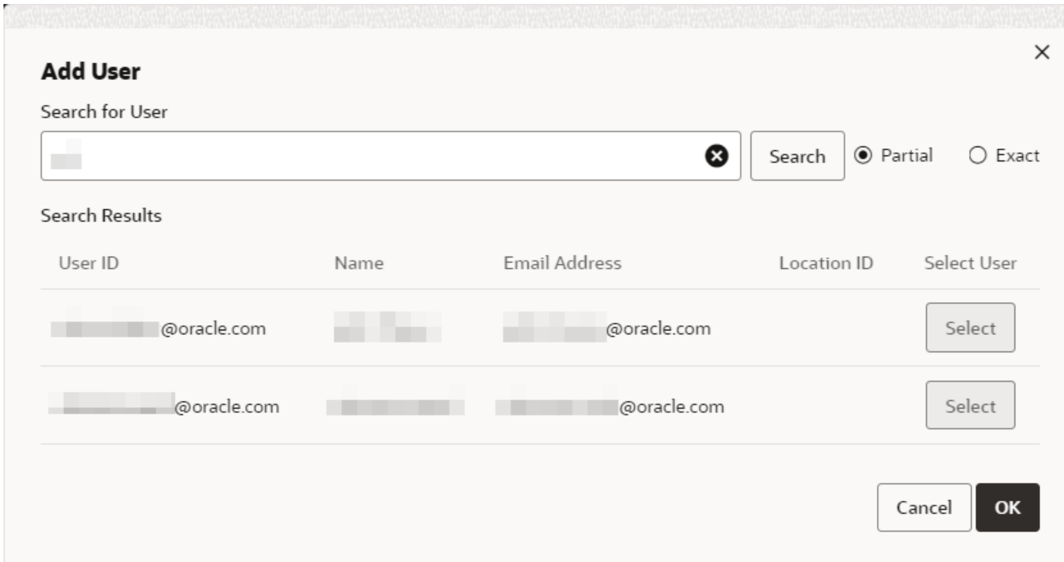
   Assign Users
4. In the Assign Users section of the Create Franchisee window, click the **Actions Menu**, and then click **Add**, or click the **Add (+)** icon. The Add Users window displays.

Figure 14-25 Add Users



5. In the Search for User field, enter the **User ID**, **Name**, **Email Address**, or **Location** of the user you want to search for.
6. Select **Partial**, if you want to results that match part of what you enter, or select **Exact** if you only want results that are an exact match.
7. Click **Search**. A list of users matching the search text is displayed in the Search Results grid.

Figure 14-26   Search Results Grid

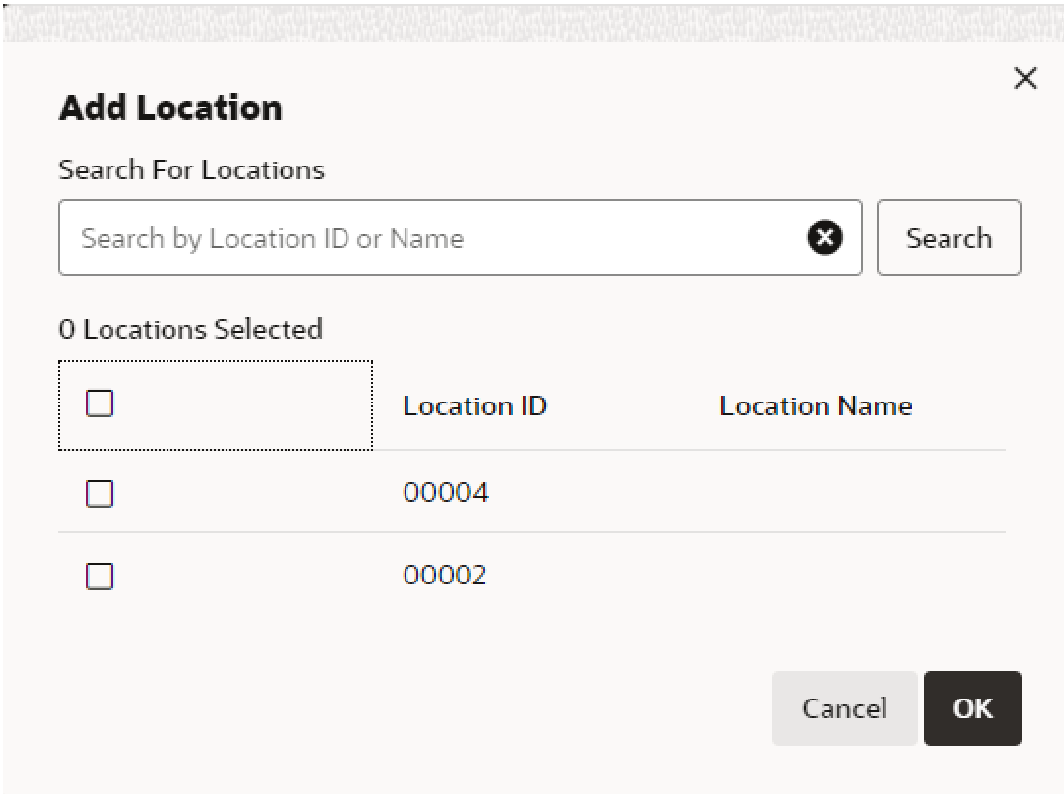


8. For each user you wish to assign, click **Select**.
9. For each user you wish to unassign, click **Unselect**.
10. Click **OK** to accept the changes, or **Cancel** to close the window without saving.
11. Select **OK** to save or **Cancel** to exit. You do not at this time have to add locations. If you wish to associate locations to the new franchisee at this time, then proceed to the Assign Locations section.

    Assign Locations

12. In the Assign Locations section of the Create Franchisee window, click the **Actions Menu**, and then click **Add**, or click the **Add (+)** icon. The Add Location window displays.

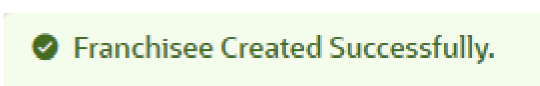
Figure 14-27 Add Location



13. Enter **all** or **part** of a **Location ID** or **Name**.
14. Click **Search**.
15. Select the top **Location ID** check box to add all locations, or select each **individual Location ID** check box for each location to assign to the Franchisee.
16. Click **OK** to accept the changes, or **Cancel** to close the window without saving.
17. Click **OK** to create the new franchisee, or click **Cancel** to close without saving.

    A notification appears to indicate the successful creation of a Franchisee.

Figure 14-28 Notification



Editing Franchisees

To edit a Franchisee do the following:

1. Highlight the **row** of the Franchisee.
2. Click the **Actions** menu and select **Edit**, or click the **Edit (Pencil)** icon.
3. **Edit** the Franchisee. See Adding Franchisees for more information.

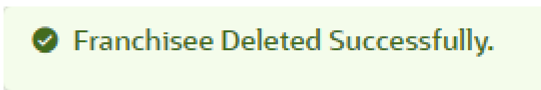
Deleting a Franchisee

To delete a Franchisee do the following:

1. Highlight the **row** of the Franchisee.
2. Click the **Actions** menu and select **Delete**, or click the **Delete (X)** icon.

   A notification appears confirming the successful deletion of the Franchisee.

Figure 14-29 Notification



> **Note:**
>
> The delete function will not process if the Franchisee is associated with one or more customers. A notification appears to indicate the process did not complete.

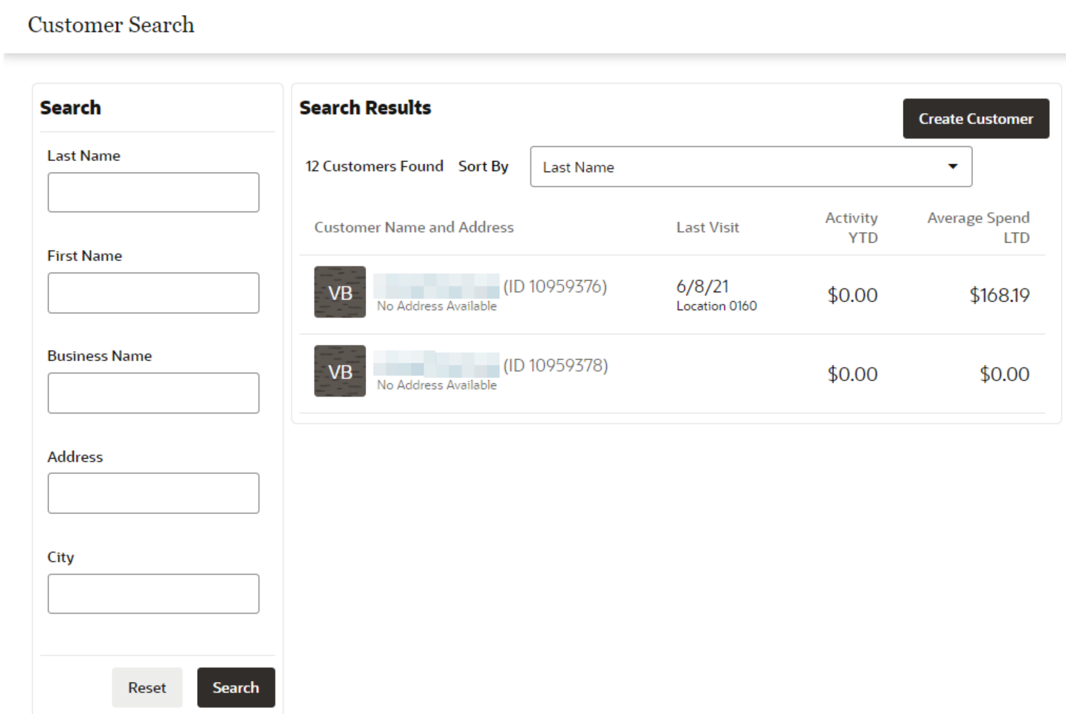
Viewing Assigned Customers to a Franchisee

To view the assigned customers to a franchisee do the following:

1. Highlight the **row** of the Franchisee.
2. Click the **Actions** menu and select **View Customers**, or click the **View Customers** icon.

   The Customer Search window opens. The Search Results section lists the customers assigned to the franchisee.

Figure 14-30 Customer Search Results



3. Close the **Customer Search** tab to return to the Franchisees.

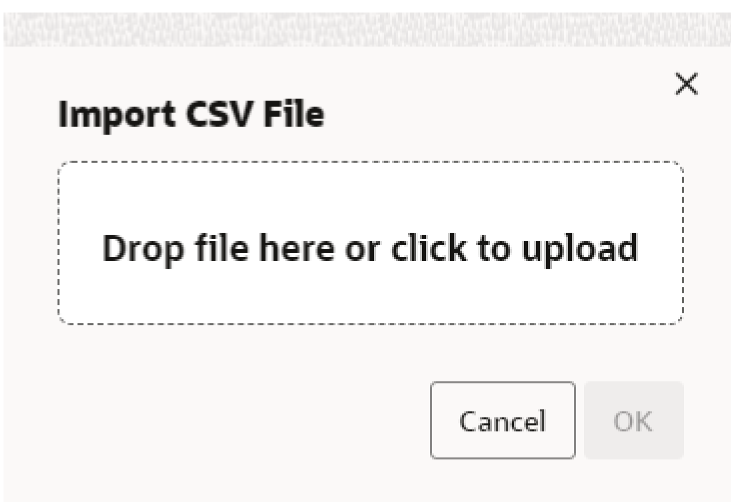
Import Franchisees using CSV File

You have the ability to import a csv file containing the franchisees for a client, so that they can be brought into Customer Engagement without creating them all manually.

To import by CSV do the following:

1. Click the Actions menu and select Import CSV file.

Figure 14-31 Import CSV File



2. To add a file either:
   - **Drag and Drop** a new file as shown in
   - Click anywhere in the **Drop file here or click to upload** box.
3. After uploading the CSV file, it will scan for viruses and validate the uploaded file's name, size, and extension. After passing the validations, the name of the file will appear on the popup and the **OK** button is enabled
4. Click **OK** to import the file or click **Cancel** the close the window without saving.

> **Note:**
>
> The Franchisees from the CSV file will be read, validated, and saved into the database and the appropriate response message will be displayed. Failure response will also be shown on the click of OK, in case of invalid CSV file. Click **Done** to close the window and refresh the base Franchisees screen.

Location Management

Use the Location Management window to add or edit a location.

1. Click the **Tasks** icon.
2. Click the **Admin Task**.
3. Click the **Location Management Task**.

The following information is displayed for each location:

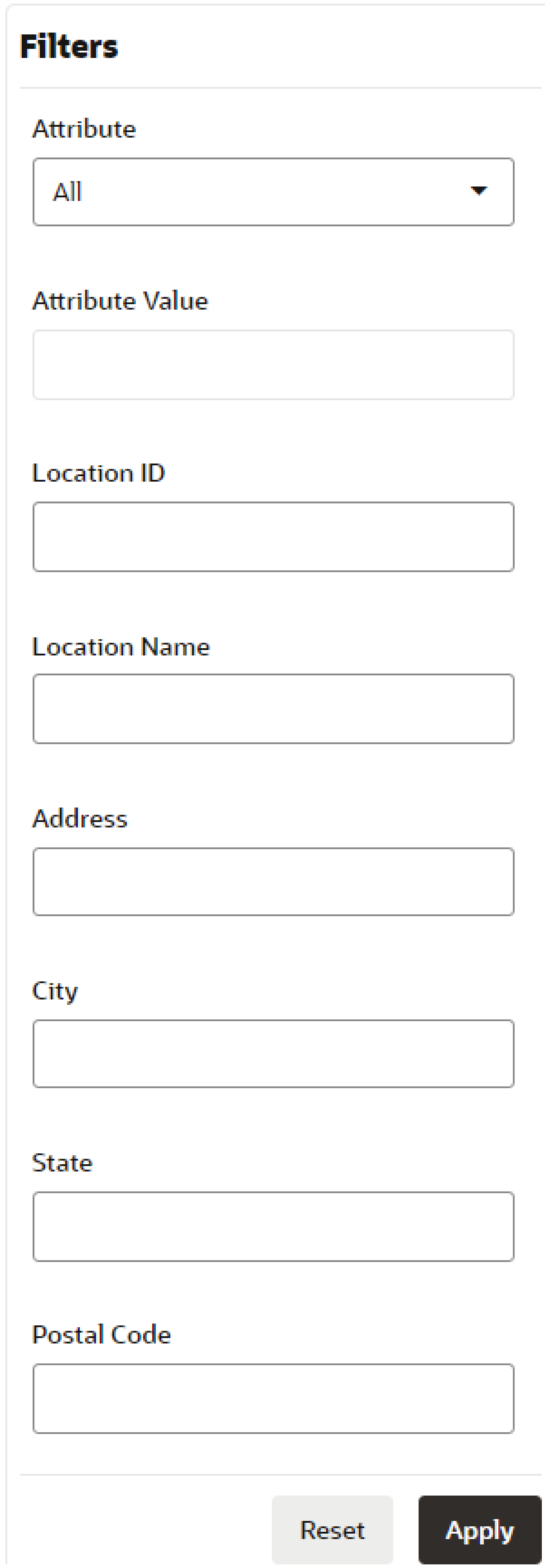
- **Location ID** – Unique ID of the Location.
- **Location Name** – Name of the Location.
- **Address** –Address 1 of the Location.
- **Franchisee Location** – Indicates whether the Location is a Franchisee.
- **Active** – Indicates whether the Location is currently active.

Filter the results by completing the following steps:

Filtering the Results

1. Enter the information in any available following fields:

Figure 14-32 Filter Options



- **Attribute** – Additional, descriptive information about a Customer Engagement element.
- **Attribute Value** – This is a dynamic field based on the attribute previously selected.
- **Location ID** – Unique ID for the Location.
- **Location Name** – Name of the Location.
- **Address** – Address 1 of the Location.
- **City** – City of the Location.
- **State** – State or Province of the Location.
- **Postal Code** – Postal Code or Zip Code of the Location.

2. Click **Apply** to filter the results, or click **Reset** to clear the fields.

> **Note:**
>
> The results remain the same even if you click **Reset**. Reset only clears the previously entered filter criteria. The results will only refresh when another filter is configured.

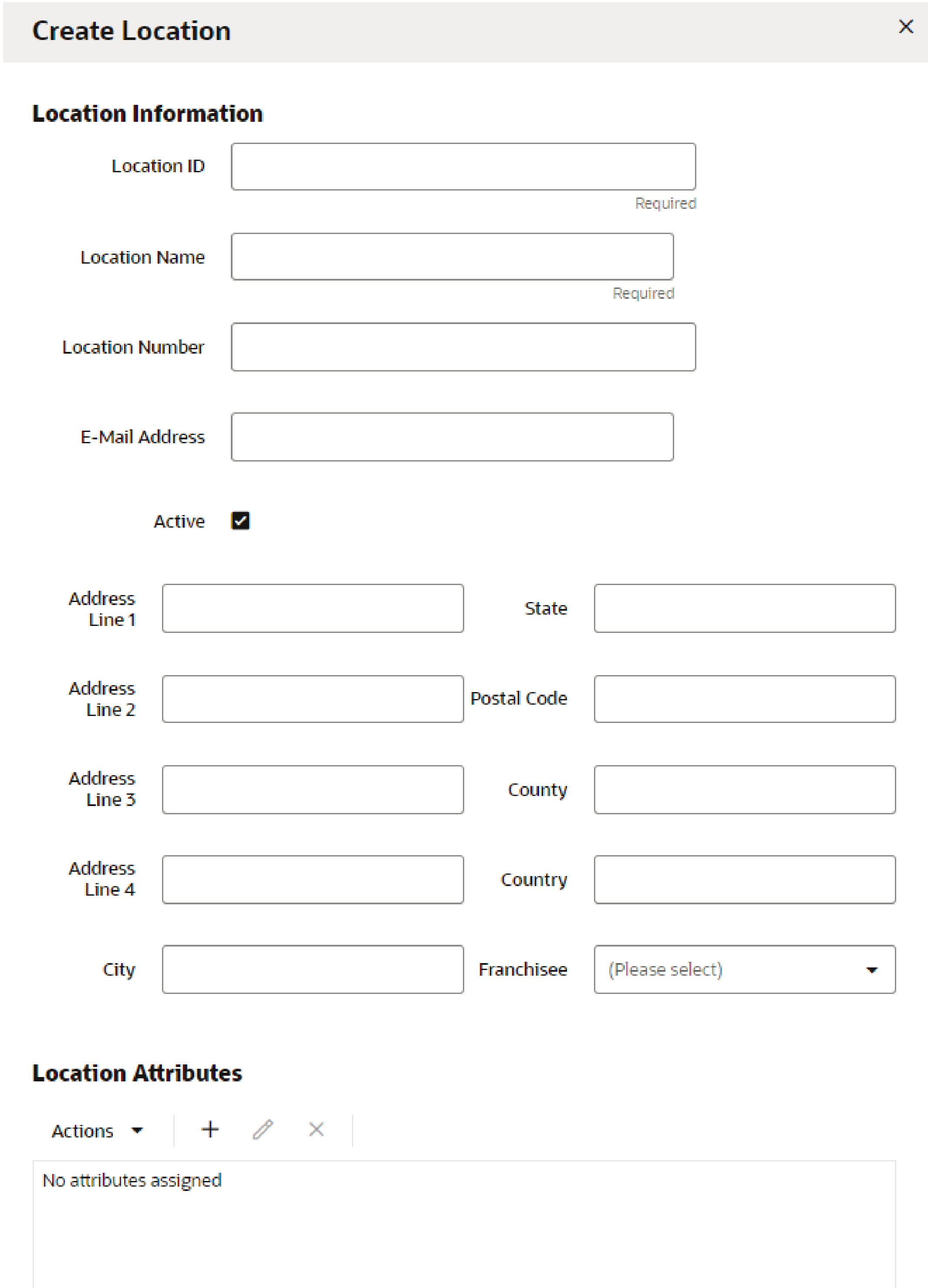
Adding a Location

Use the following steps to add a location:

Location Information

1. Click the **Add (+) icon**, or choose **Add** from the **Action** menu. This displays a Create Location window where you can enter the following information:

Figure 14-33 Create Location



2. Enter the values for the following fields:
   - **Location ID -** Unique ID of the Location (Required field).
   - **Location Name -** Name of the Location (Required field).
   - **Active -** Indicates whether the Location is currently active. The default is checked.
   - **Location Number -** Location Number of the Location.

- **Email Address** - Email address for the Location.
- **Address Line 1** - Line 1 of the Location's address.
- **Address Line 2** - Line 2 of the Location's address.
- **Address Line 3** - Line 3 of the Location's address.
- **Address Line 4** - Line 4 of the Location's address.
- **City** - City of the Location.
- **State** - State or Province of the Location.
- **Postal Code** - Postal Code or ZIP Code of the Location.
- **County** - County of the Location.
- **Country** - Country of the Location.
- **Franchisee** - Name of the Franchisee to which the Location is assigned (optional).

3. Either continue to the Location Attributes section or, if no Location Attribute additions are required, Click **OK** to create the Location. Click **Cancel** to close the window without saving.

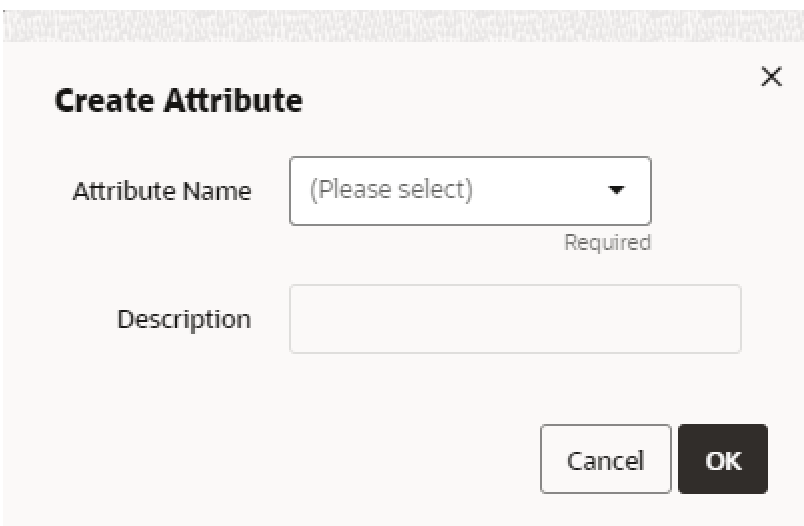
Location Attributes

If configured, the user can Add, Edit, or Delete Location Attributes.

Adding a Location Attribute

1. To add a Location attribute, click the **Action Menu** and click **Add** or click the **Add (+) icon.** This displays a Create Attribute window where you can enter the following information:

Figure 14-34 Create Location Attribute



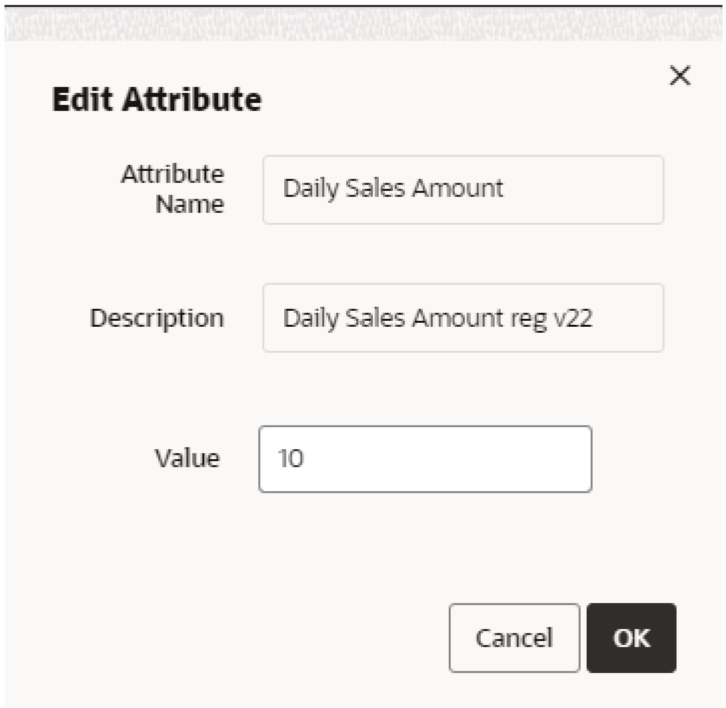
- Click the **Attribute Name** list.
- The Value field is dynamic and is based off of the data type of the attribute. The user either enters a value or selects a value from the list.

2. Click **OK**. This adds the new Location Attribute. Or select **Cancel** to close the window without adding the location attribute.

Editing a Location Attribute

1. To edit a Location attribute, highlight the Location Attribute and click the **Action Menu**, then click **Edit**, or click the **Edit icon**.

Figure 14-35 Edit Attribute

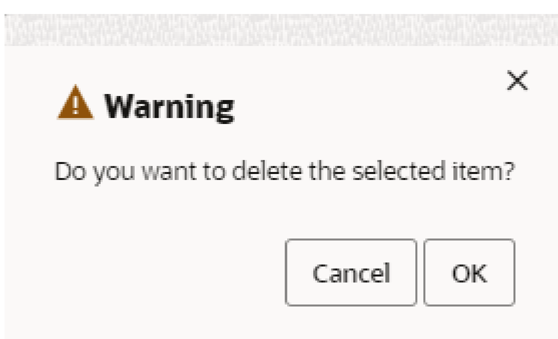


2. Edit the location attribute value.
3. Click **Ok** to accept the change or **Cancel** to close without saving.

Deleting a Location Attribute

1. To delete a Location Attribute, highlight the **row** of the location attribute and from the Action menu, click **Delete**, or click the **Delete X icon**.

Figure 14-36 Warning



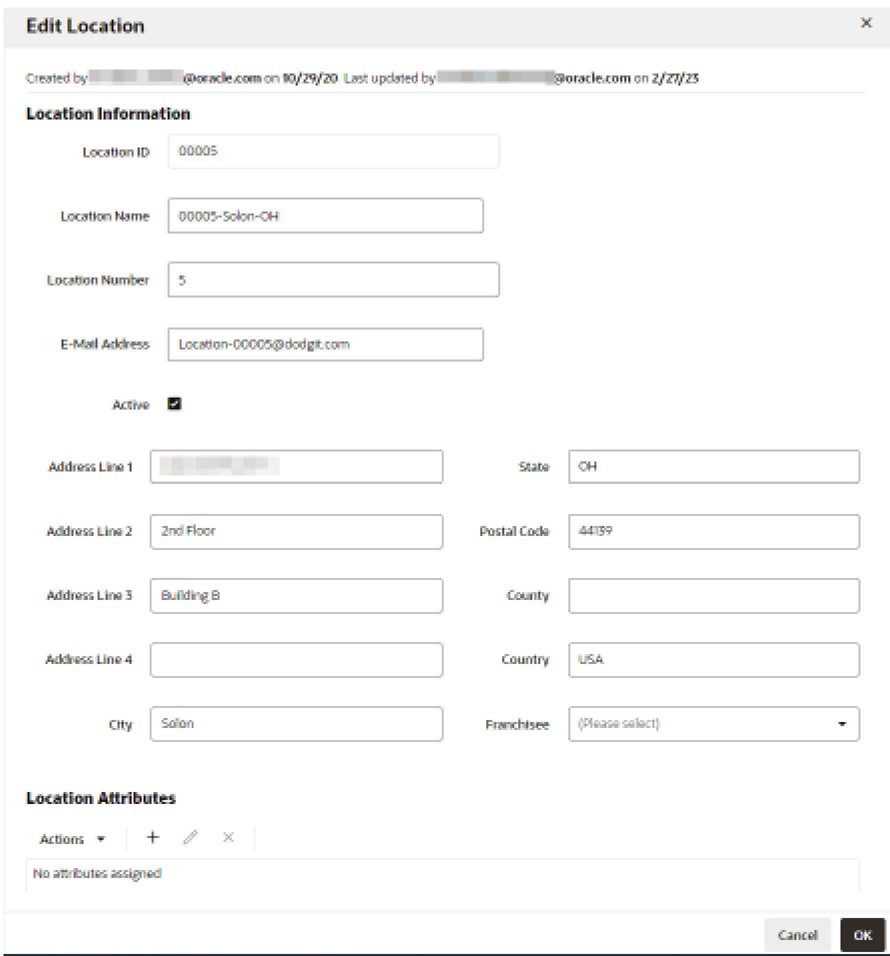
2. Click **OK** to delete the Location Attribute, or **Cancel** to return to the list of Location Attributes.
3. Once all Location Attributes are determined, click **OK** to create the location, or **Cancel** to close the window without saving.

Editing a Location

To edit the information in the Location Information, and/or Location Attribute sections for the Location, select the location from the Location Management window.

1. Click the **Edit** icon, or choose **Edit** from the **Actions** menu. This displays an Edit Location window which displays a window with details of the location:

Figure 14-37 Edit Location



2. Make any necessary change to the Location Information fields, and/or the Location Attributes values.
3. Click **OK** to accept the changes. The location is displayed with the new information. Click **Cancel** to close without saving.

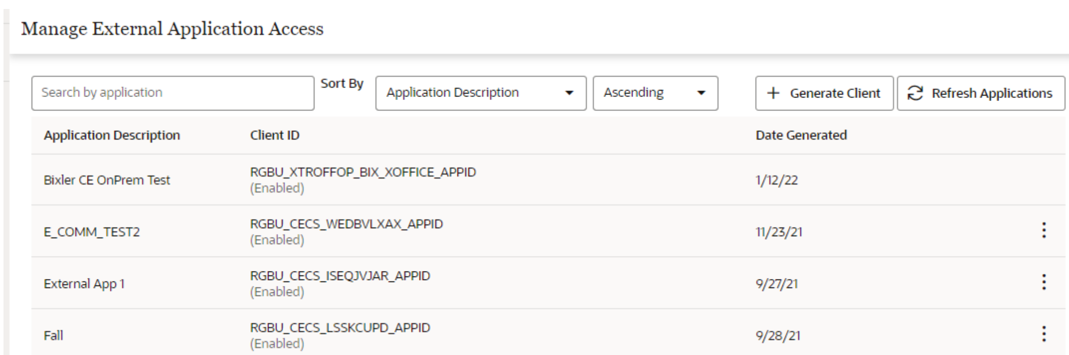
Managing External Application Access

As a retailer with external applications, I want a consistent view of the product integration with various application clients from Customer Engagement, so that my experience is the same regardless of the application I am in.

To view the list of application clients do the following:

1. Click **Tasks**.
2. Click **Admin**.
3. Click **Manage External Application Access**. The Manage External Application window displays.

Figure 14-38 Manage External Application Access



Searching Application Clients

Enter part or all of an Application Description and press **Enter**.

Sorting Application Clients

You can Sort By the following options:

- Application Description (default)
- Client ID
- Date Generated

Applications can be sorted ascending or descending from the list.

Delete an Application Client

To delete an Application, do the following:

1. Click the **Action menu** of the Application you want to delete.
2. Click **Delete** which opens the delete confirmation window.
3. Click **OK** to delete the Application or **Cancel** to close the window without deleting the application.

> **Note:**
>
> A confirmation notification appears to confirm the Application is deleted.

Disable an Application Client

To disable an Application, do the following:

1. Click the **Action menu** of the Application you want to disable.
2. Click **Disable** which opens the disable confirmation window.
3. Click **OK** to disable the Application or **Cancel** to close the window without disabling the application.

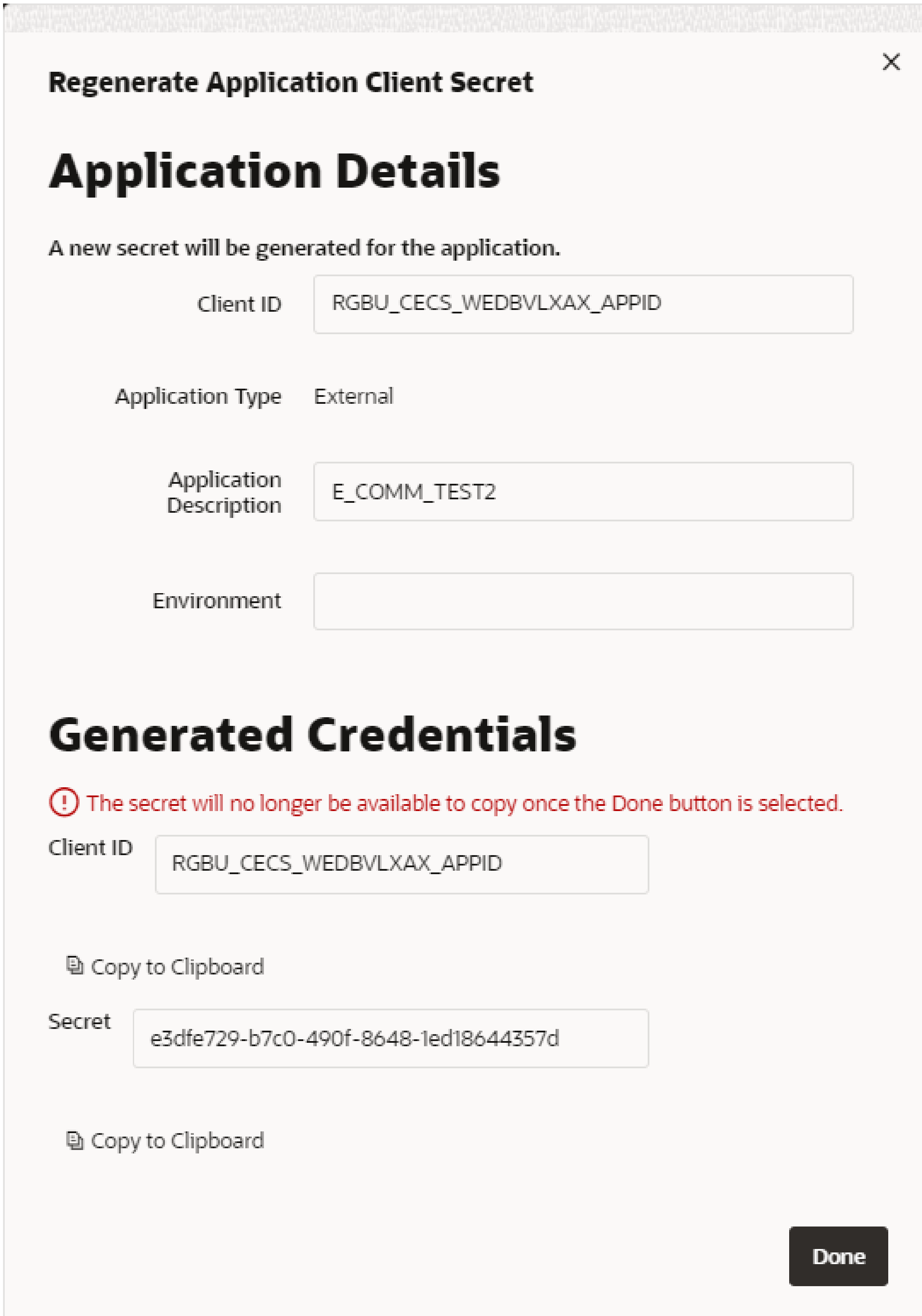
> **Note:**
>
> A confirmation notification appears to confirm the Application is disabled.

Regenerate Secret

To regenerate secret, do the following:

1. Click the **Action menu** of the Application you want to regenerate secret.
2. Click the **Regenerate Secret** which opens the confirmation window.
3. Click **OK** to continue the process, or **Cancel** to close the window without regenerating secret. The Regenerate Application Client Secret window opens.
4. The window confirms a new secret will be generated. The Application Details display. Click Regenerate to regenerate secret or Cancel to close the window without saving. The Generated Credentials appear.

Figure 14-39 Generated Credentials



5. Click **Copy to Clipboard** to copy the **Client ID**.
6. Click **Copy to Clipboard** to copy the **Secret**.
7. Click **Done** to close the window.

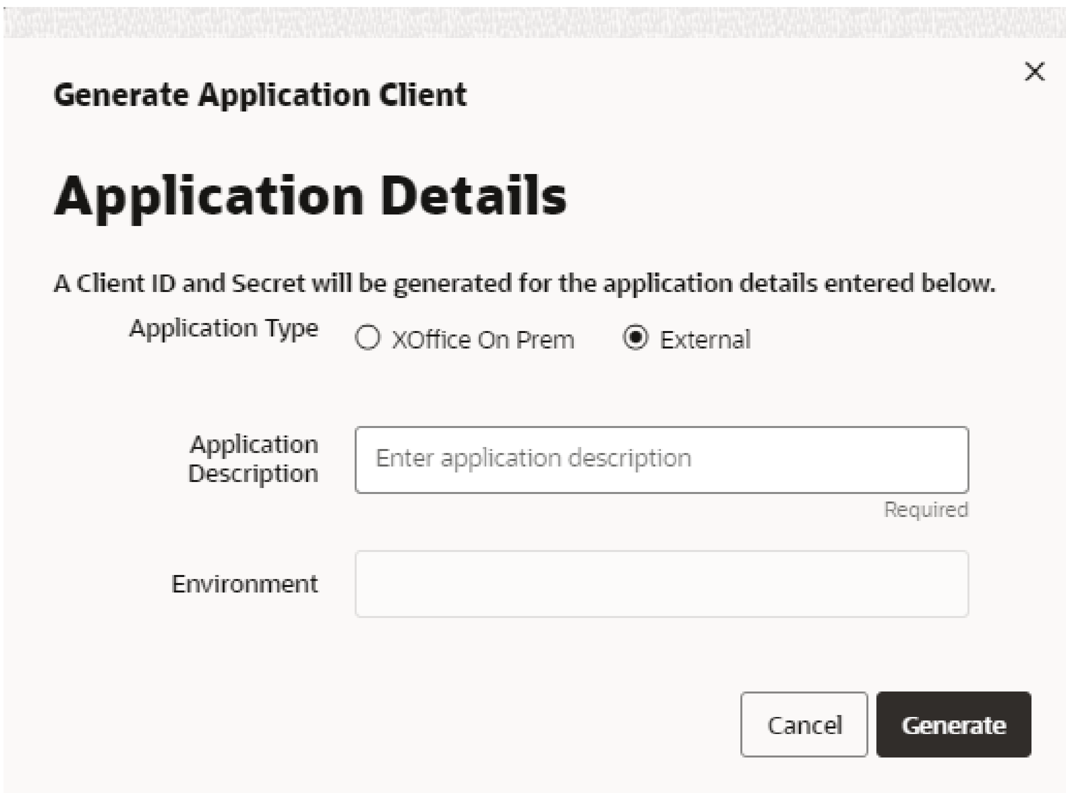
> **Note:**
> The secret will no longer be available to copy once the Done button is selected.

Generate Client

You have the ability to generate an application client for IDCS or OCI-IAM from Customer Engagement, so that my experience is the same regardless of the application I am in. To generate a client do the following:

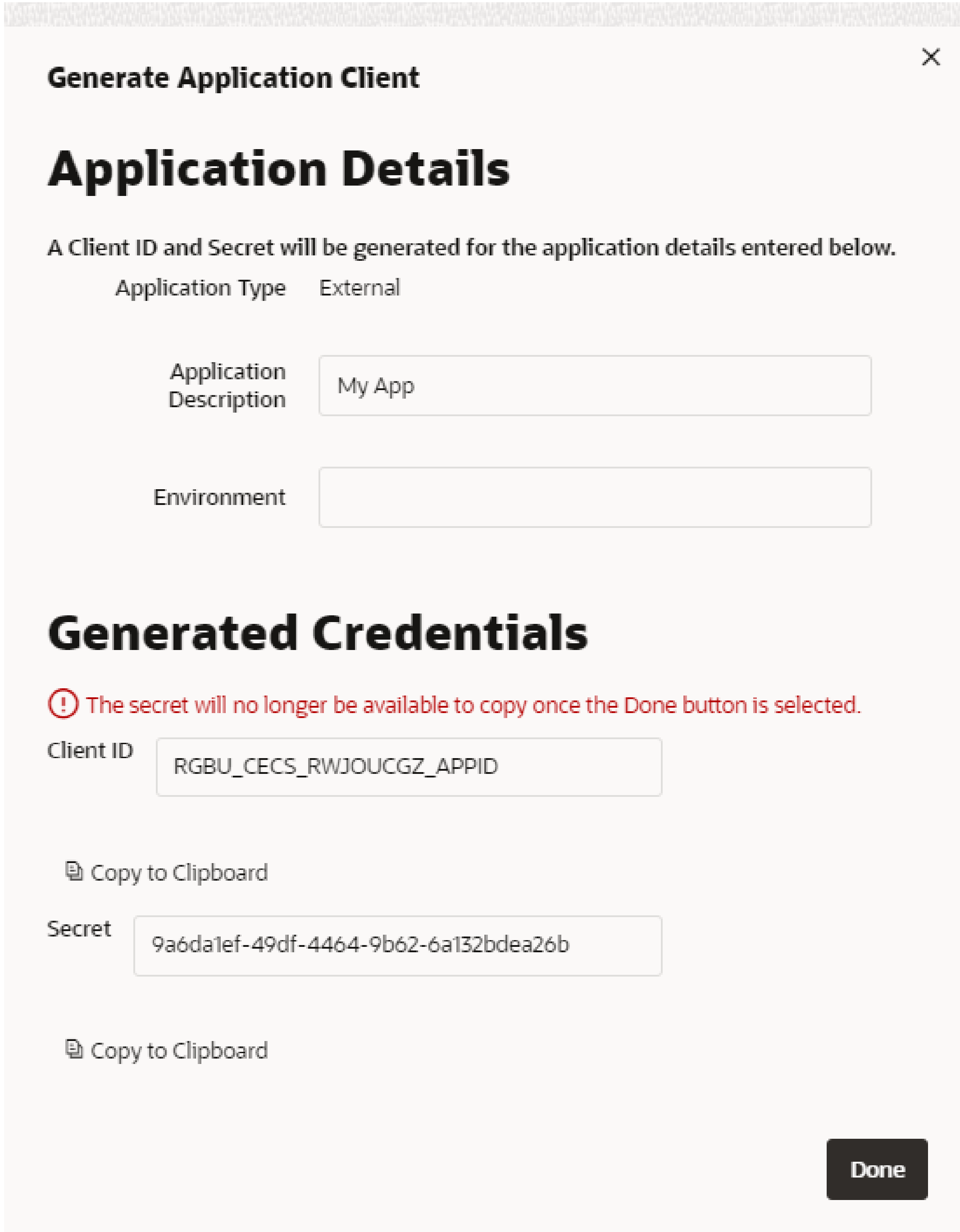
1. From the Manage External Applications Access window, click **+ Generate Client**. The Generate Application Client window opens.

Figure 14-40 Generate Application Client



2. Select an **Application Type**.
   - XOffice On Prem
   - External
3. Enter the **Application Descriptio**n.
4. Enter the **Environment**. (only available for XOffice On Prem)
5. Click **Generate**. The Generated Credentials appear.

Figure 14-41 Generated Credentials



6. Click **Copy to Clipboard** to copy the Client ID and Secret in order to paste into the configuration for linking applications. You will receive a notification: "Copied" for the Client ID. For Secret, a confirmation window appears if you have the Client ID still in memory. Click **OK** to copy the Client Secret or **Cancel** to close that confirmation without copying.

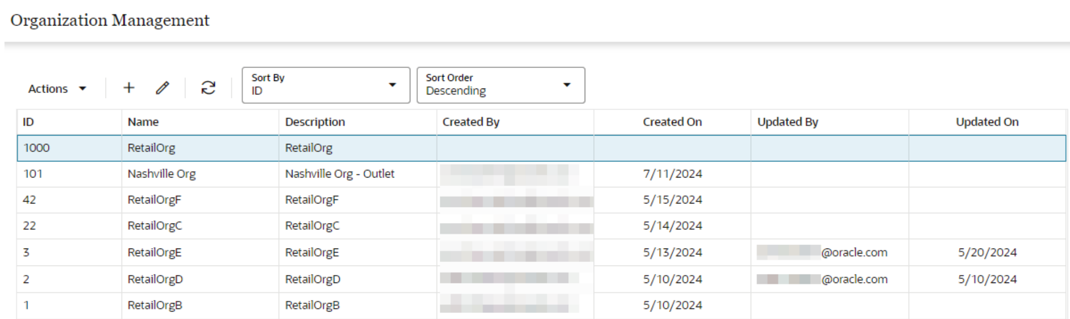
> **Note:**
>
> You may also manually highlight the Client ID and Secret and use Copy/Paste.

Organization Management

The Organization Management screen will allow a retailer to create separate organizations for their brands and keep the brand/organization data separate from other organizations.

1. Click the **Tasks** icon.
2. Click the **Admin Task**.
3. Click the **Organization Management Task**.

Figure 14-42 Organization Management



The following information is displayed for each organization:

- **ID** – Unique ID of the Organization.
- **Name** – Name of the Organization.
- **Description** – A description of the Organization.
- **Created By** – The User ID of the person who created the organization.
- **Created On** – The date the organization was created.
- **Updated By** – The User ID of the person who updated the organization.
- **Updated On** – The date the organization was updated.

Organizations can be Added, Edited, or Refreshed. Click the **Action** menu or the **Icon** for each action to perform these actions.

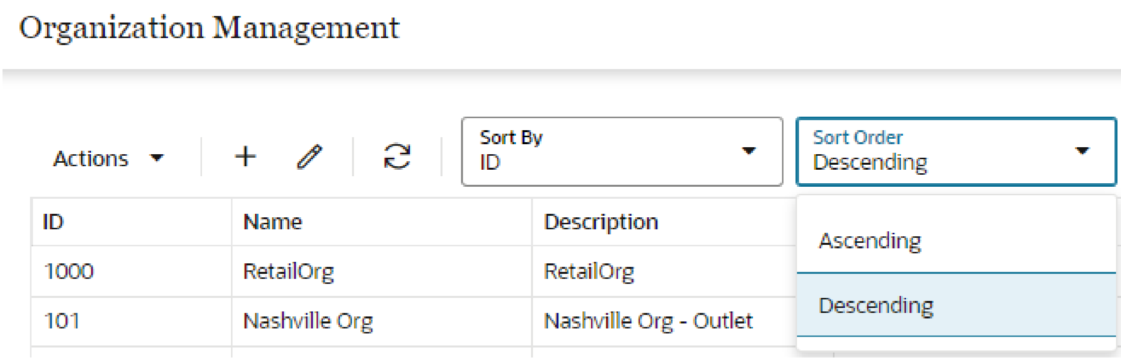
Sorting Organizations

You can sort by:

- Created By
- Created On
- Description
- ID (Default)
- Name
- Updated By
- Updated On

Organizations can be sorted ascending or descending using the following Sort By options:

Figure 14-43 Sorting Organizations



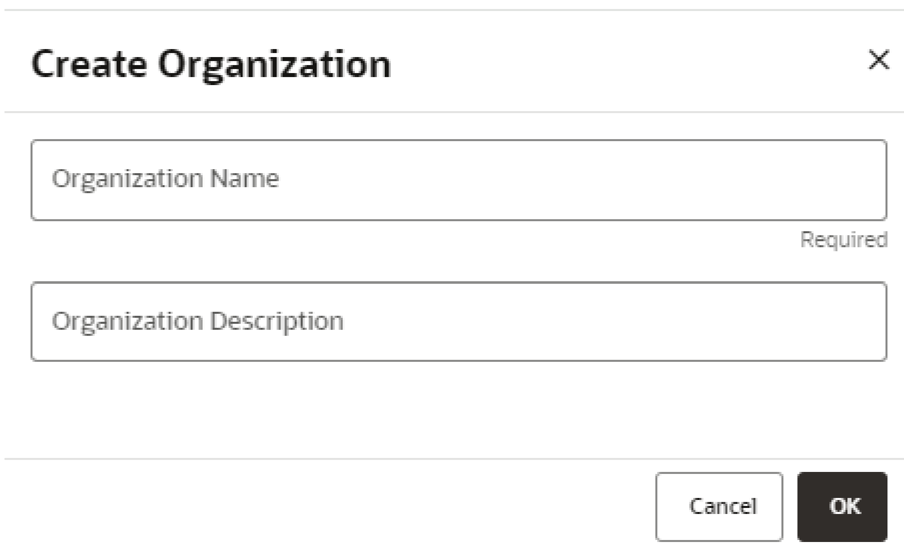
- Ascending
- Descending (Default)

Adding Organizations

Use the following steps to add an Organization:

1. Click the **Add (+) icon**, or choose **Add** from the **Action** menu. This displays a Create Organization drawer where you can enter the following information:

   Figure 14-44 Create Organization

   > **Note:**
   >
   > The Organization ID is generated by the system and is not editable.

2. Enter the values for the following fields:

- **Organization Name** - Name of the Organization (Required field).
- **Organization Description** - A description of the Organization.

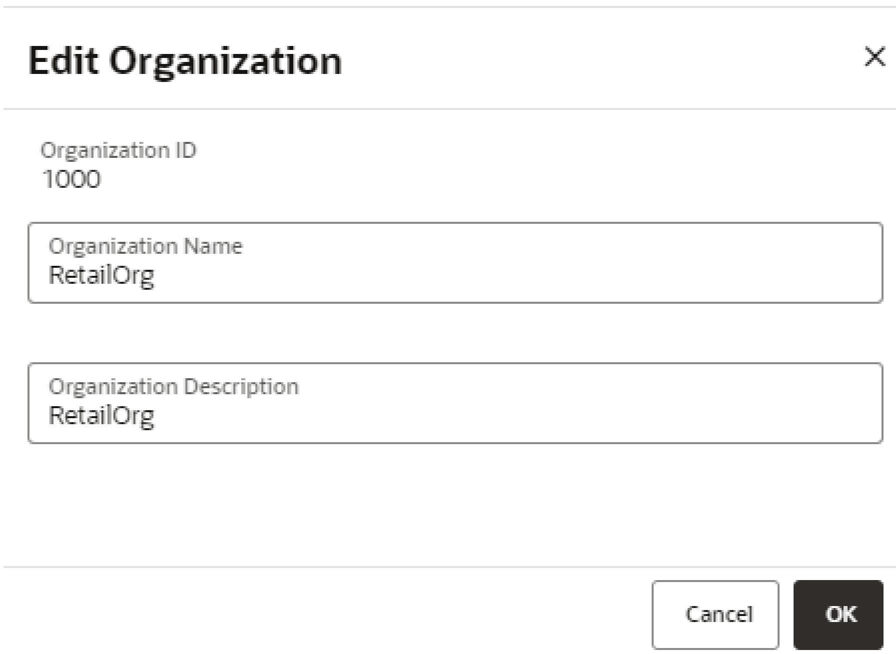
3. Click **OK** to create the Organization. Click **Cancel** to close the drawer without saving.

Editing an Organization

Use the following steps to add an Organization:

1. Click the **Penicil icon**, or choose **Edit** from the **Action** menu. This displays a Edit Organization drawer where you can edit the following information:

Figure 14-45 Edit Organization



> **Note:**
>
> The Organization ID is generated by the system and is not editable.

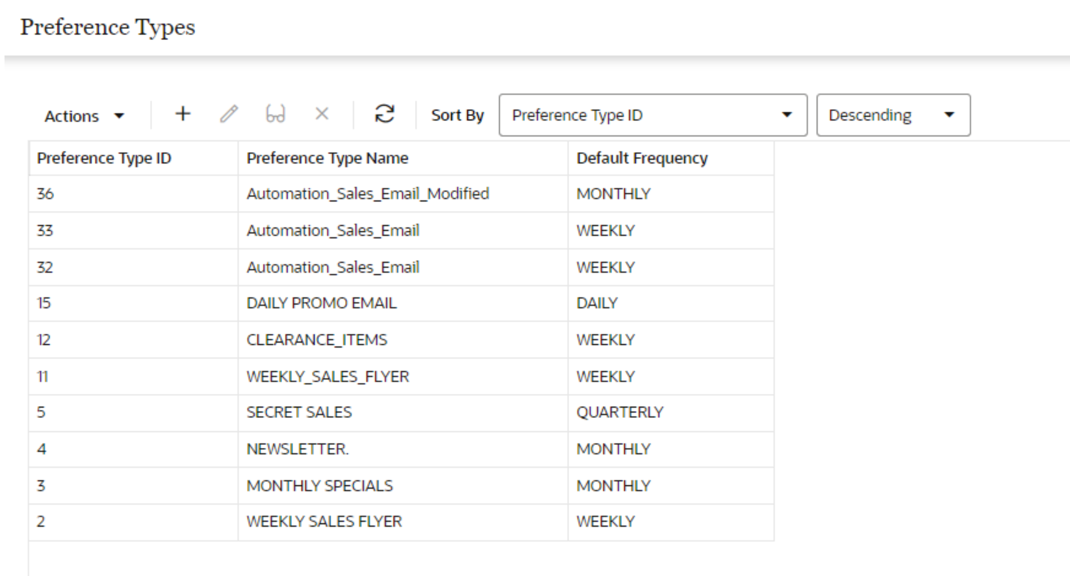
2. Enter the values for the following fields:
   - **Organization Name** - Name of the Organization (Required field).
   - **Organization Description** - A description of the Organization.
3. Click **OK** to accept the changes to the Organization. Click **Cancel** to close the drawer without saving.

Preference Types

Preference Types are methods in which a customer can receive promotional information from the retailer. In this section, you can sort, add, edit, view, and delete preference types, so that you can setup unlimited preference types to use with the Customer Preference Center. To access Preference Types:

1. Click the **Tasks** icon.
2. Click the **Admin Task**.
3. Click the **Preference Types Task**.

Figure 14-46 Preference Types



Preference Type ID	Preference Type Name	Default Frequency
36	Automation_Sales_Email_Modified	MONTHLY
33	Automation_Sales_Email	WEEKLY
32	Automation_Sales_Email	WEEKLY
15	DAILY PROMO EMAIL	DAILY
12	CLEARANCE_ITEMS	WEEKLY
11	WEEKLY_SALES_FLYER	WEEKLY
5	SECRET SALES	QUARTERLY
4	NEWSLETTER.	MONTHLY
3	MONTHLY SPECIALS	MONTHLY
2	WEEKLY SALES FLYER	WEEKLY

Sorting Preference Types

You can sort by:

- Default Frequency
- Preference Type ID
- Preference Type Name

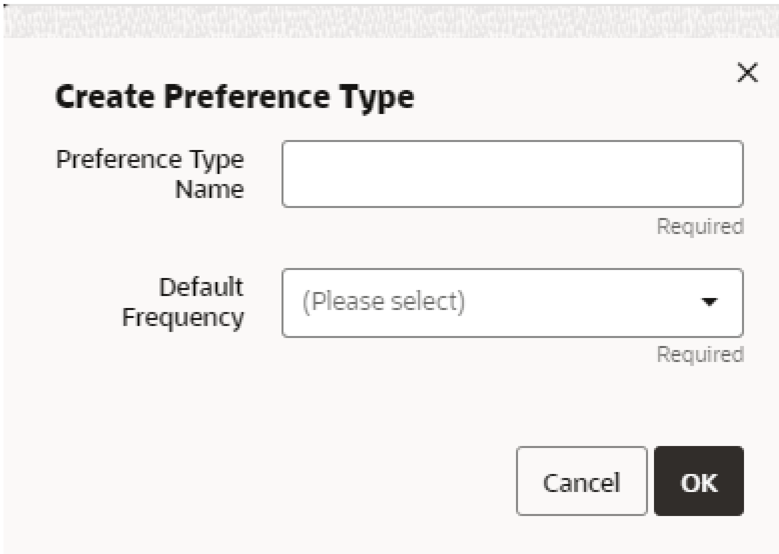
Preference types can be sorted ascending or descending from the list.

Adding a Preference Type

To add a Preference Type do the following:

1. To add a Preference Type, click the **Action Menu** and click **Add**, or click the **Add (+) icon**. This displays the Create Preference Type window where you can enter the following information:

Figure 14-47 Create Preference Type



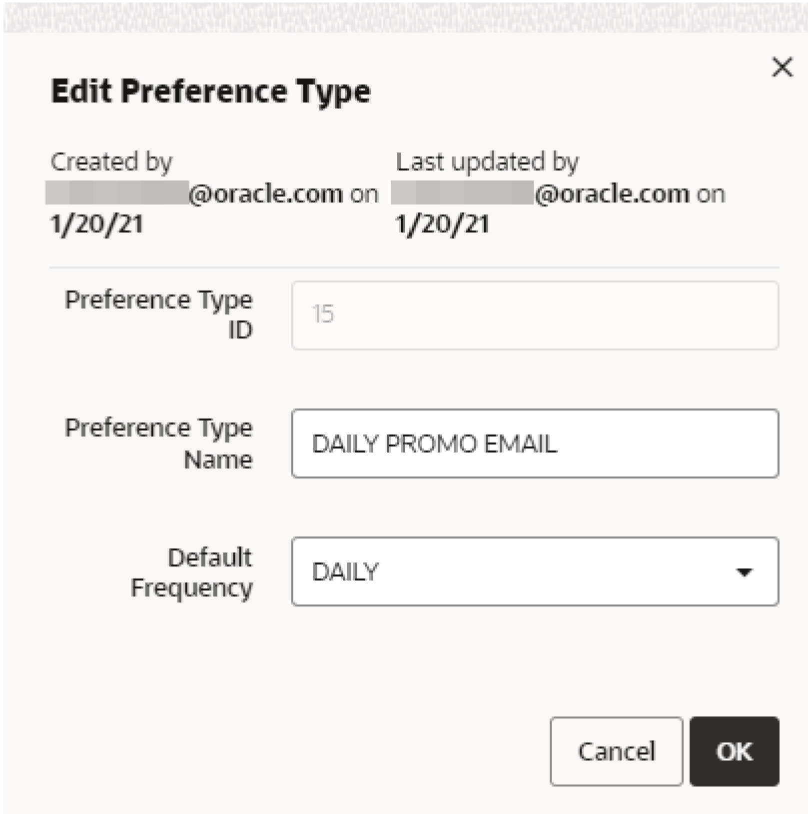
2. Type a Preference Type Name and choose one of the following default frequencies – both fields are required (these frequencies are configurable).
   - Anytime
   - Weekly
   - Monthly
   - Yearly
   - Daily
   - Quarterly
3. Click **OK** to add the new Preference Type. Click **Cancel** to close the window.

Editing a Preference Type

To edit a Preference Type, do the following:

1. Highlight the **row** of the Preference Type you want to edit and click the **Actions** menu or the **Edit icon** to open the Edit Preference Type window.

Figure 14-48 Edit Preference Type



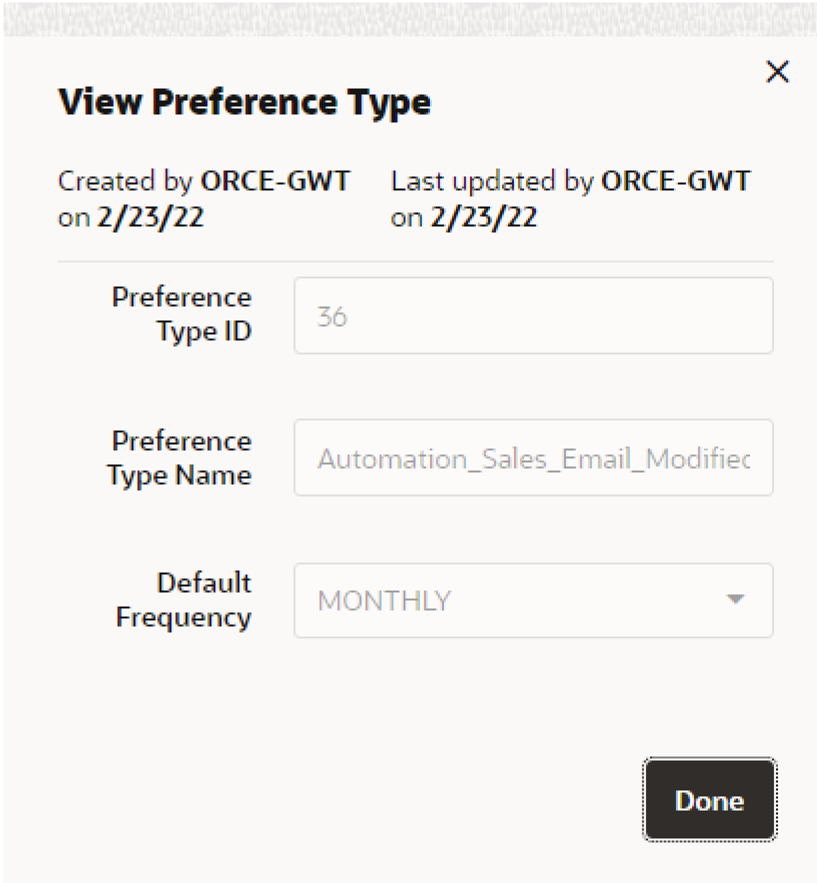
2. Edit the Preference Type Name or select a different Default Frequency and click **OK**. Click **Cancel** to close the window and discard any changes.

Viewing a Preference Type

To view a Preference Type, do the following:

1. Highlight the **row** of the Preference Type you want to view.
2. Click the **Actions** menu or the **View icon** to open the View Preference Type window.

Figure 14-49 View Preference Type



3. View the details of the Preference Type and click **Done** to close the window.

Delete a Preference Type

To delete a Preference Type, do the following:

1. Highlight the **row** of the Preference Type you want to delete.
2. Click the **Actions** menu **Delete** option, or the **Delete icon** which opens the delete confirmation window.
3. Click **OK** to delete the Preference Type or **Cancel** to close the window without deleting the row.

> **Note:**
>
> A confirmation notification appears to confirm the Preference Type has been deleted.

Role Groups

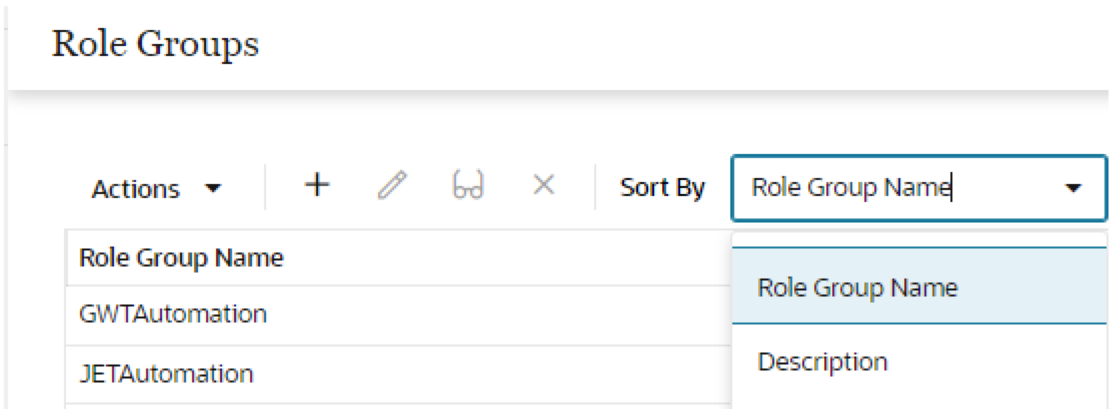
You have the ability to view, add, edit, and delete role groups, so that you can define which permissions should be granted to a role group. To access Role Groups do the following:

1. Click **Menu**.
2. Click the **Admin** task.
3. Click **Role Groups**. The Role Groups window displays.

Sorting Role Groups

Roles Groups can be sorted ascending or descending using the following Sort By options:

Figure 14-50 Sorting Role Groups



- Role Group Name (default)
- Description

Adding Role Groups

To add a Role Group do the following:

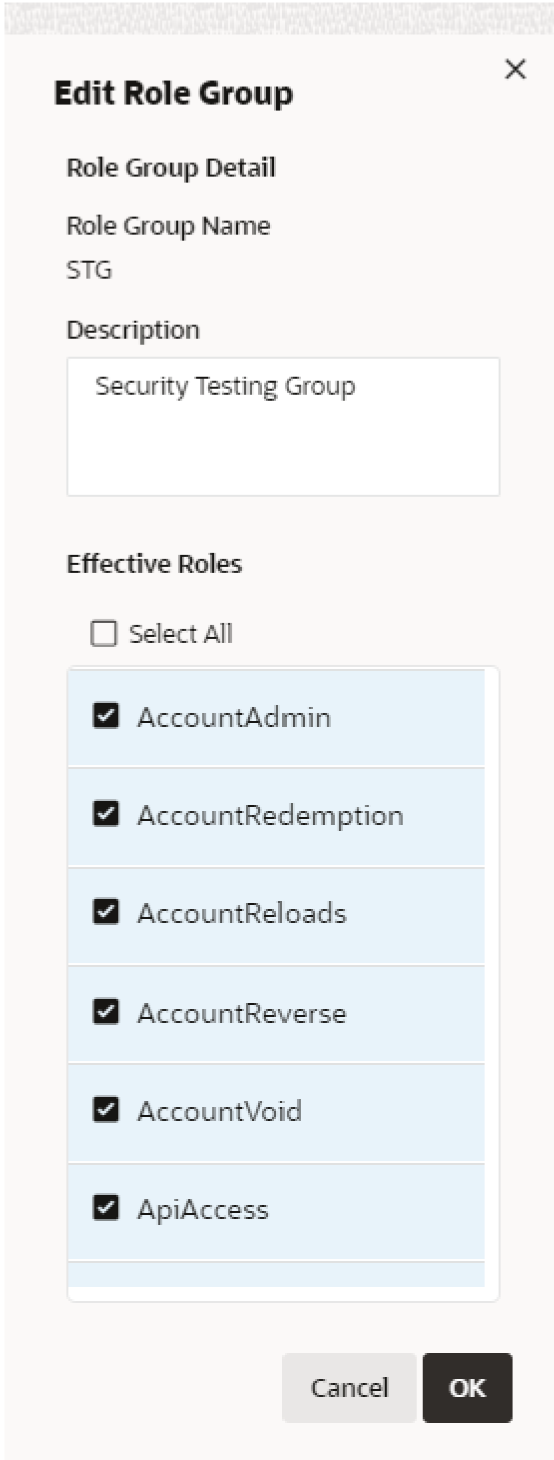
1. Click the **Actions** menu **Add** option, or the **+ icon** which opens the Add Role Group window.
2. Enter a Role Group Name.
3. Enter a Description.
4. Use the **Select All** check box to select all Effective Roles or select **individual** Effective Roles using the check box **next** to the role.
5. Click **OK** to add the role group, or click **Cancel** to close the window without saving.

Editing Role Groups

To edit a Role Group do the following:

1. Highlight a **Role Group**.
2. Click the **Actions** menu **Edit** option, or the **Pencil icon** which opens the Edit Role Group window.

Figure 14-51 Edit Role Group



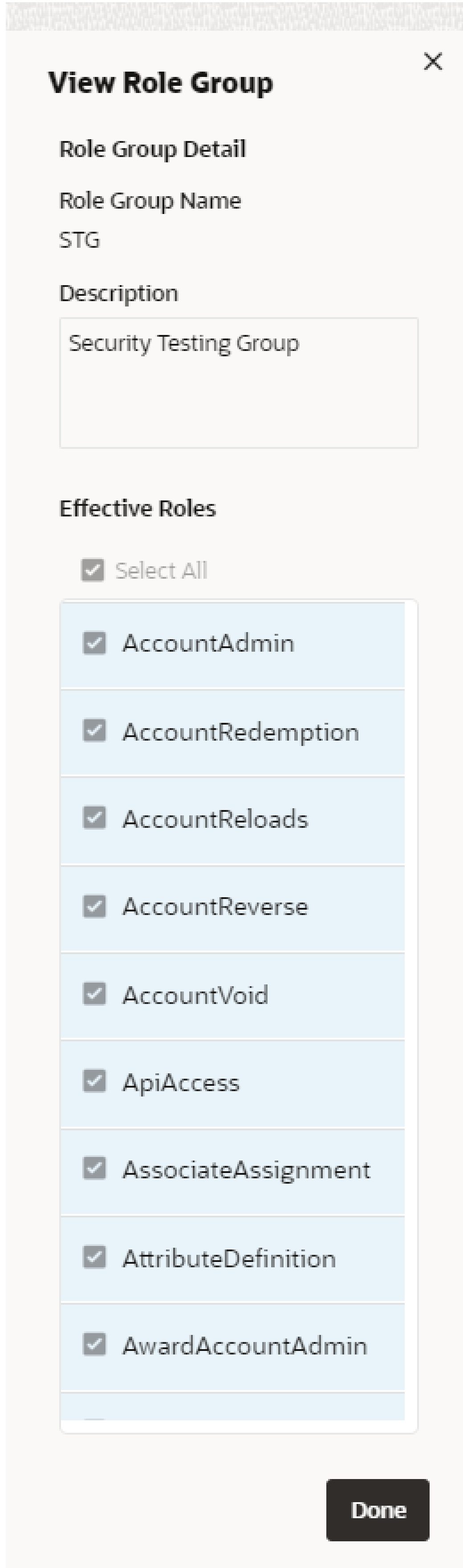
3. Edit the **Description**.
4. Edit the **Effective Roles**.
5. Click **OK** to save the changes, or click **Cancel** to close the window without saving.

View Role Group

To view a Role Group do the following:

1. Highlight a **Role Group**.
2. Click the **Actions** menu **View** option, or the **Eyeglasses icon**. The View Role Group window displays.

Figure 14-52 View Role Group



3. Click **Done** to close the window.

Delete Role Group

To delete a Role Group do the following:

1. Highlight a **Role Group**.
2. Click the **Actions** menu **Delete** option, or the **X icon**.
3. Click **Yes** to delete the Role Group, or click **No** to close the window without saving.

Security Groups

Security Groups determine whether Users can access and/or modify Customer information in that Security Group. Each Security Group is assigned a certain permission level for the Customers in that group. Each User assigned to a Security Group is assigned the permissions for that Security Group.

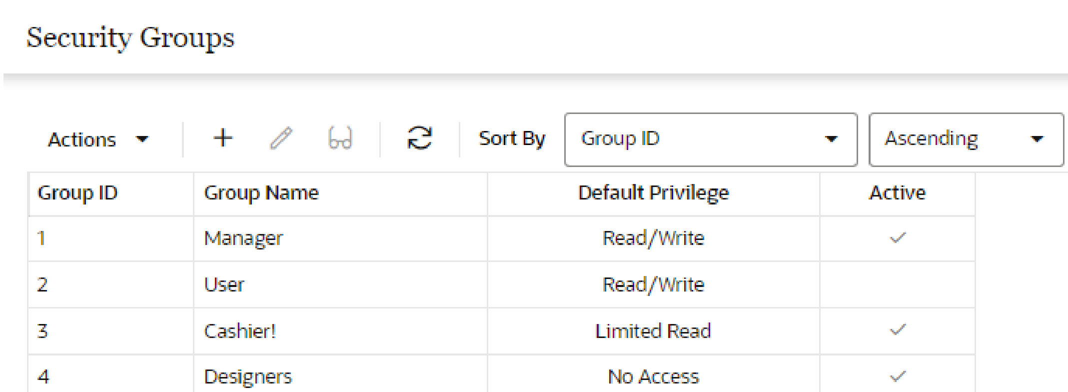
> **Note:**
>
> This option is available only if the user has been assigned the `SystemAdmin` role. See the `Oracle Retail Customer Engagement Cloud Service Implementation Guide` for more information on assigning User Roles.

Accessing Security Groups

To access the Security Groups do the following:

1. Click **Menu**.
2. Click the **Admin** task.
3. Click the **Security Groups** task. The Security Groups window displays.

Figure 14-53 Security Groups



The following fields are displayed:

- The following fields are displayed:

  Group ID – ID of the Security Group.

- **Group Name** – Name of the Security Group.
- **Default Privilege** – The access privileges given to Users in the Security Group. These access privileges are specific to the Customer. For a description of the Default Privilege Types, see , Default Privilege.
- **Active** – Indicates whether the Security Group is Active or not.

Sorting Results

In the Security Groups window, the user can sort the list to refine the results (see Figure 14-53). Results can be sorted Ascending or Descending using the following sorting options:

- Active
- Default Privilege
-
  - Read/Write
  - Read Only
  - Limited Read
  - No Access
- Group ID (Default)
- Group Name

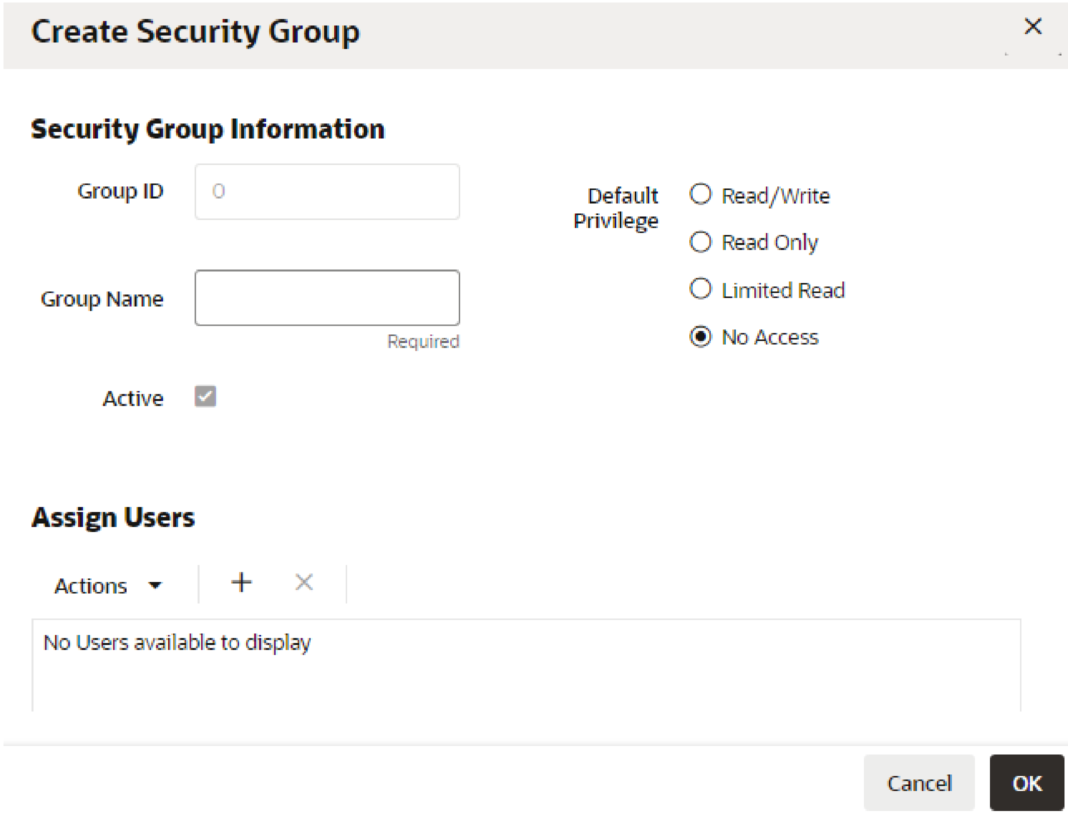
Working with the Security Groups

Creating a New Security Group

To create a new Security Group do the following:

1. Click the **Actions Menu**, and then click **Add**, or Click the **Add (+)** icon. The Create Security Group window displays.

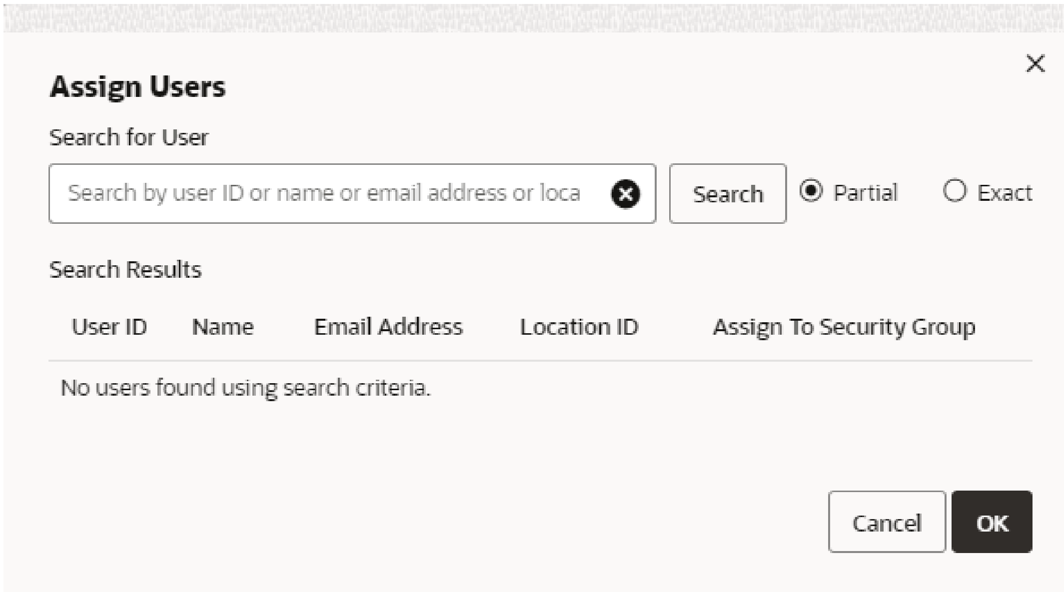
Figure 14-54 Create Security Group



2. Enter the following information:
   - Group ID – (Read Only) Automatically assigned ID of the Security Group.
   - Group Name – (Required) The name you want to give to the Security Group.
   - Active – Indicates whether the Security Group is Active or not.
   - Default Privilege – Security Groups have the following privilege types available, listed in order from most permissible to least.
     – **Read/Write -** Users in the Security Group can read and update all data for Customers who have had the Security Group applied.
     – **Read Only** - Users in the Security Group can read all data for Customers who have had the Security Group applied, but cannot make updates.
     – **Limited Read -** Users in the Security Group can read some data for Customers who have had the Security Group applied, but cannot read sensitive Customer information (such as Address, Telephone Numbers, and Email Addresses) and cannot make updates.
     – **No Access -** A User in the Security Group will not even see that the Customer exists in the system.
3. Select **OK** to save or **Cancel** to exit. You do not at this time have to add users. If you wish to associate users to the new group at this time, then proceed to the Assign Users section.

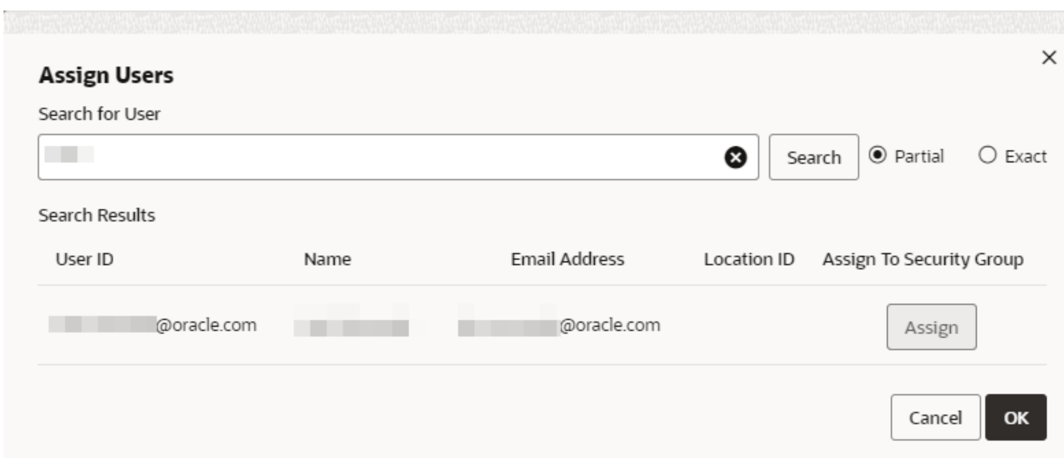
   Assign Users
4. In the Assign Users section of the Create Security Group window, click the **Actions Menu**, and then click **Add**, or Click the **Add (+)** icon. The Assign Users window displays.

Figure 14-55 Assign Users



5. In the Search for User field, enter the **User ID**, **Name**, **Email Address**, or **Location** of the user you want to search for.
6. Select **Partial**, if you want to results that match part of what you enter, or select **Exact** if you only want results that are an exact match.
7. Click **Search**. A list of users matching the search text is displayed in the Search Results grid.

Figure 14-56 Search Results Grid



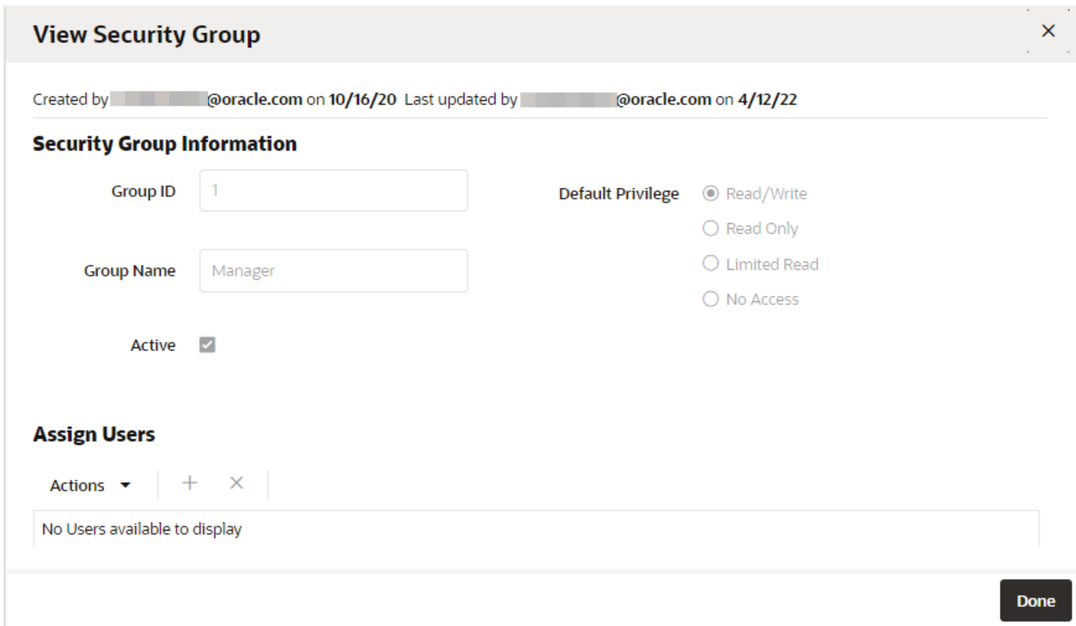
8. For each user you wish to assign, click **Assign**.
9. For each user you wish to unassign, click **Unassign**.
10. Click **OK** to accept the changes, or **Cancel** to close the window without saving.
11. Click **OK** to save the new Security Group, or **Cancel** to close the window without saving.
12. Click the **Refresh** icon to update the Security Groups results.

Viewing Security Group Details

To view Security Group Details do the following:

1. Highlight a **Security Group** from the list of results.
2. Click the **Actions Menu**, and then click **View**, or click the **View** icon. The View Security Group window displays.

Figure 14-57 View Security Group



The following information is displayed:

- **Group ID** - ID of the Security Group.
- **Group Name** - Name of the Security Group.
- **Active** - Indicates whether the Security Group Privilege is active or not.
- **Privilege Type** - Determine the access privileges given to Users in the Security Group.

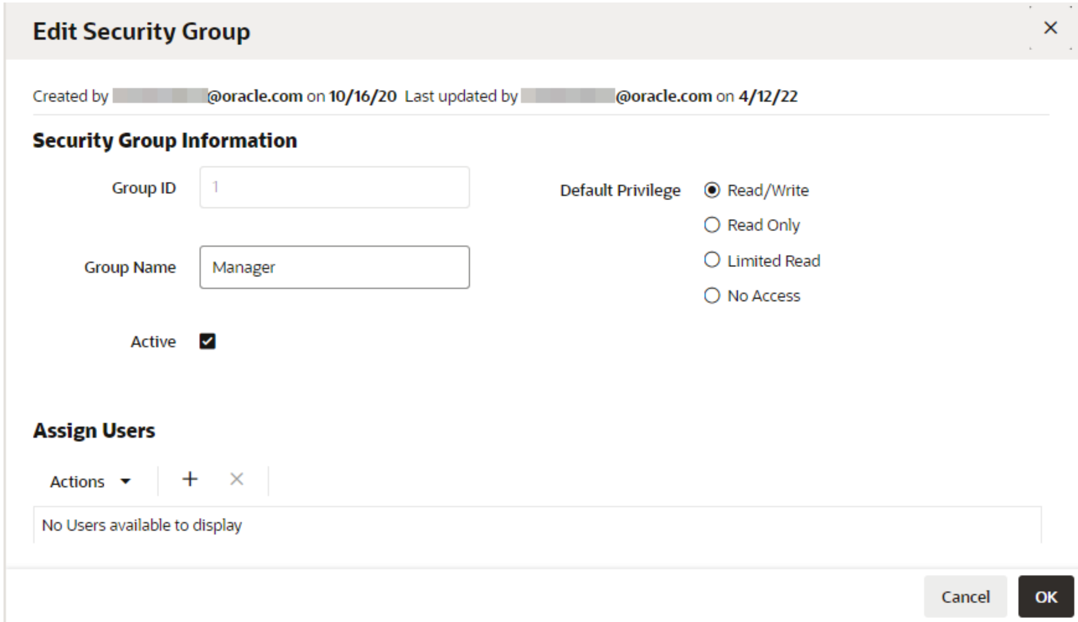
3. Click **Done** to close the window and return to the Security Group window.

Edit an Existing Security Group

To edit the Security Group Details do the following:

1. In the Security Group window, highlight a **Security Group** you wish to edit.
2. Click the **Actions Menu**, and then click **Edit**, or click the **Edit** icon. The Edit Security Group window displays.

Figure 14-58 Edit Security Group



3. The following fields are editable:
   - Group Name
   - Active
   - Default Privilege
4. You may edit the assigned users section to **Add** new, or **Remove**, any existing users.
5. Select **OK** to save or **Cancel** to exit.

System Configuration

You have the ability to view and edit system configurations, so that the system can be configured to work in the way the business operates.

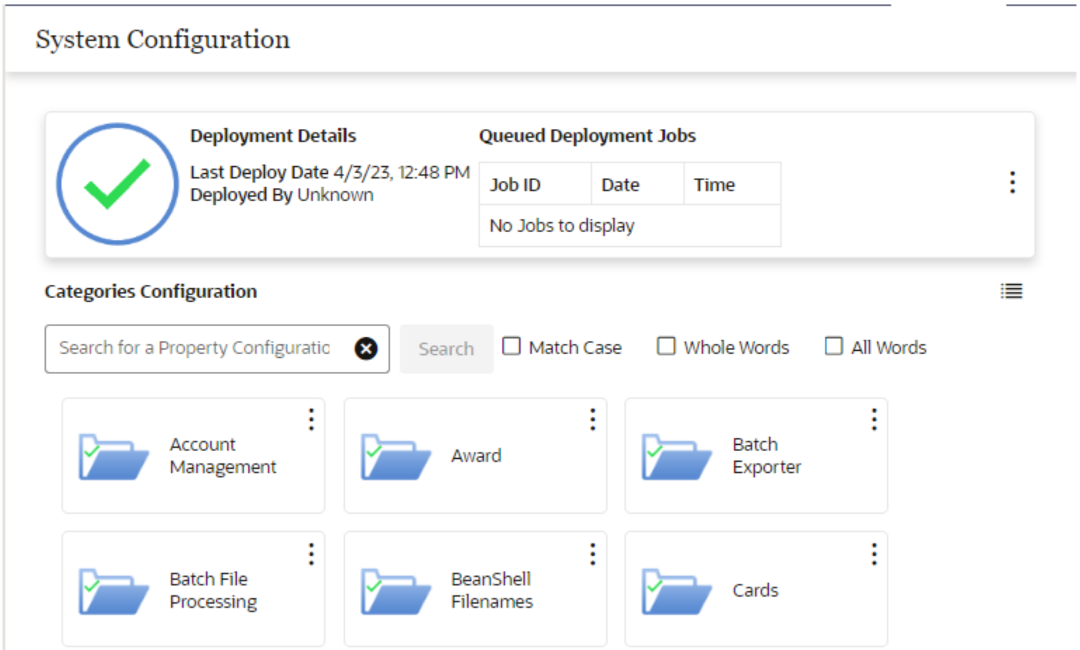
> **Note:**
>
> System Administration authority is required for all options in the System configuration feature.

Accessing System Configuration

To access System Configuration do the following:

1. Click **Menu**.
2. Click the **Admin** task.
3. Click the **System Configuration** task. The System Configuration window displays.

Figure 14-59 System Configuration



The Status Indicator icons include:

Icon	Description
	**All Good** - The configuration is stable.
	**Error** - An error has been detected in one or more of the configuration settings.
	**Waiting Deployment** - A change has been made to one or more of the configuration settings, but has not yet been deployed.
	**Deploying** - The system is currently deploying or activation changes that have been made.

The System Configuration window consists of the following areas:

- Deployment Details

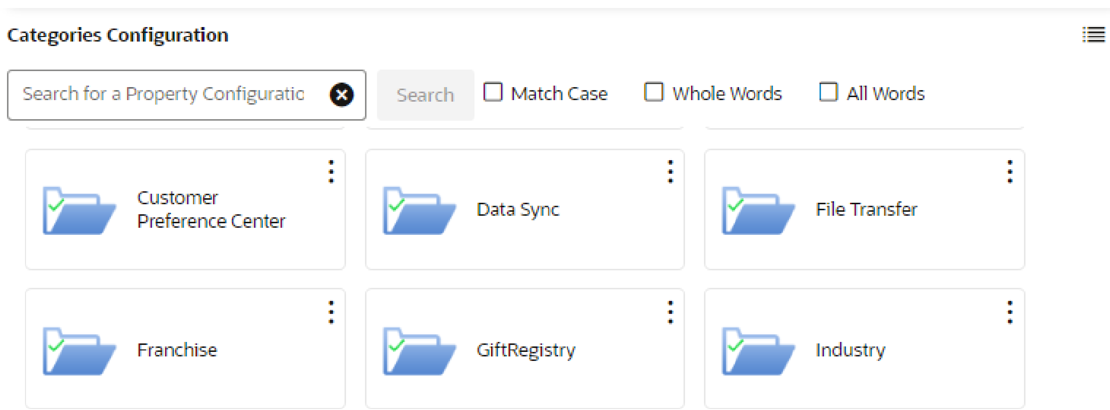
- Queued Deployment Jobs
- Categories Configuration

4. To refresh the results at any time click the System Configuration **Action** menu and click **Refresh**.

Categories Configuration

The Categories Configuration displays the Property Configurations.

Figure 14-60 Categories Configuration



Searching for Property Configurations

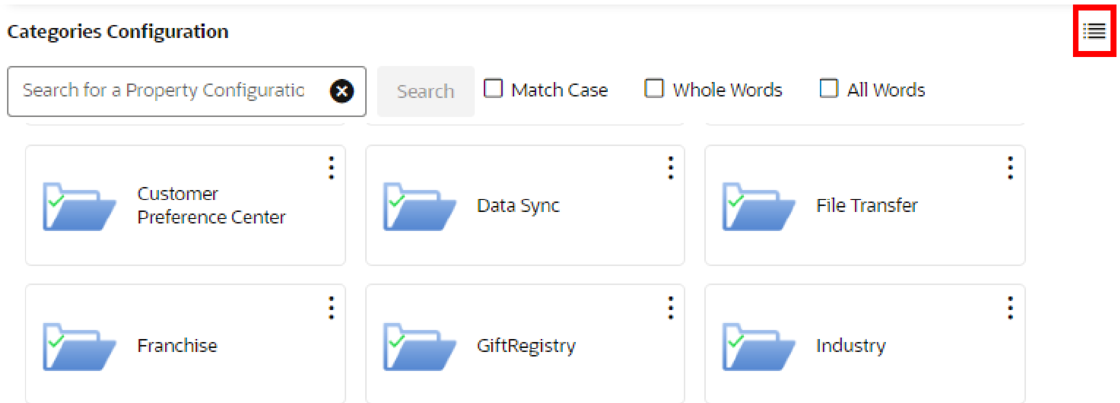
To search for a Property Configuration do the following:

1. Enter **any** or **all** of a **Property Configuration** name.
2. You may use search options that include:
   - Match Case
   - Whole Words
   - All Words
3. Click **Search**.
4. To reset the search click the System Configurations **Action** menu and then click **Return to Categories**.

Categories Configuration Views

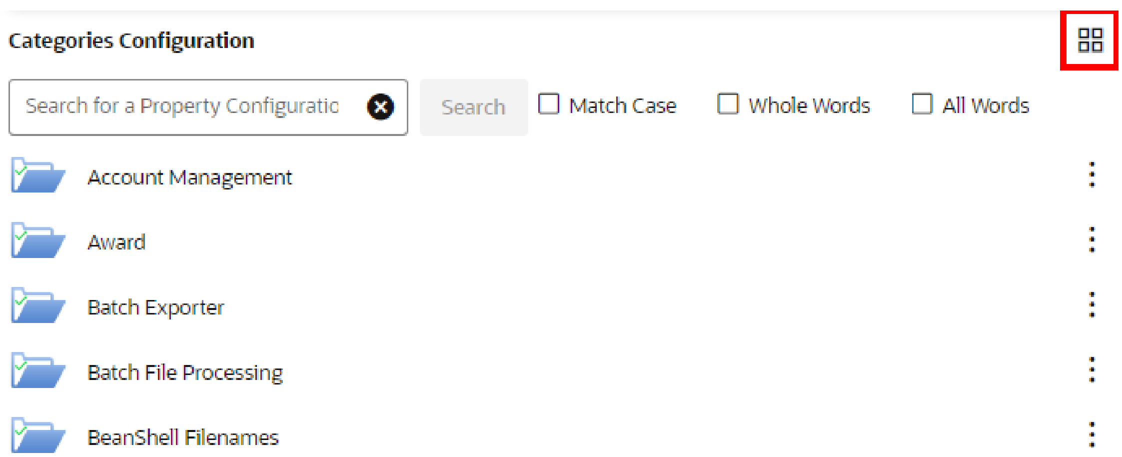
Click the **Switch to List** view icon to see the configurations in list form.

Figure 14-61 Switch to List



Click the **Switch to Card** view icon to see the configurations in list form.

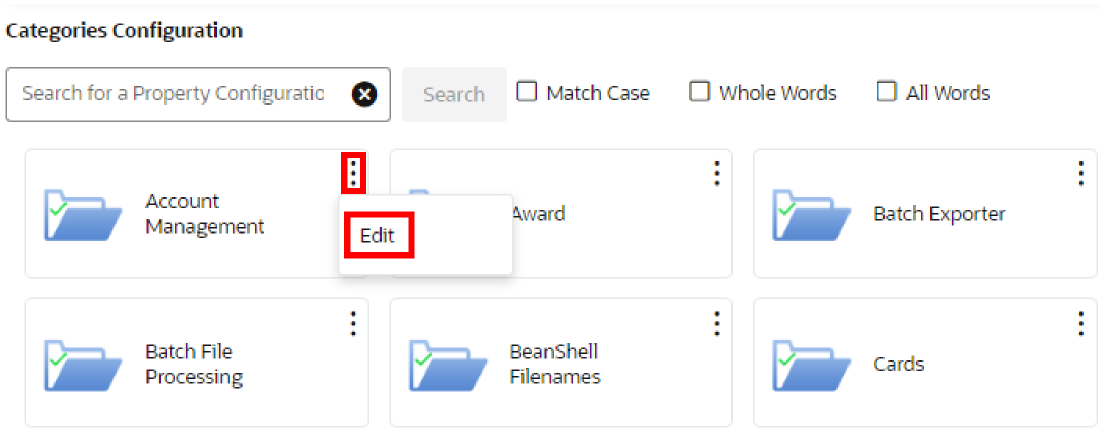
Figure 14-62 Switch to Card



Viewing Property Configurations

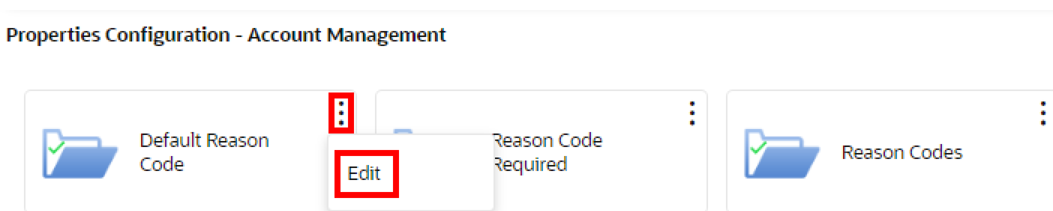
To view a Property Configuration do the following:

Figure 14-63 Property Configuration



1. Click a **Category Configuration** tile or click the **Action** menu for that tile and click **Edit**. The Property Configurations for that Category Configuration displays.

   Figure 14-64 Properties Configurations

2. To Edit the Property Configuration click the **tile** or click the **Action** menu and click **Edit**.
3. Make any **Value** changes deemed necessary.
4. Enter a **Justification**.
5. Click **OK** to save the changes, or click **Cancel** to close the window without saving.

   > **Note:**
   >
   > Saved property configurations need to be deployed. See **Deploy** for more information.

6. At any time you can refresh the results by clicking the System Configurations **Action** menu and then click **Refresh**.
7. To return to the Categories Configuration click the System Configurations **Action** menu and then click **Return to Categories**.

Working with System Configurations

The following Action Menu options include:

- Audit Log - Review a listing of configuration activity, including property changes, deployment, imports and uploads.

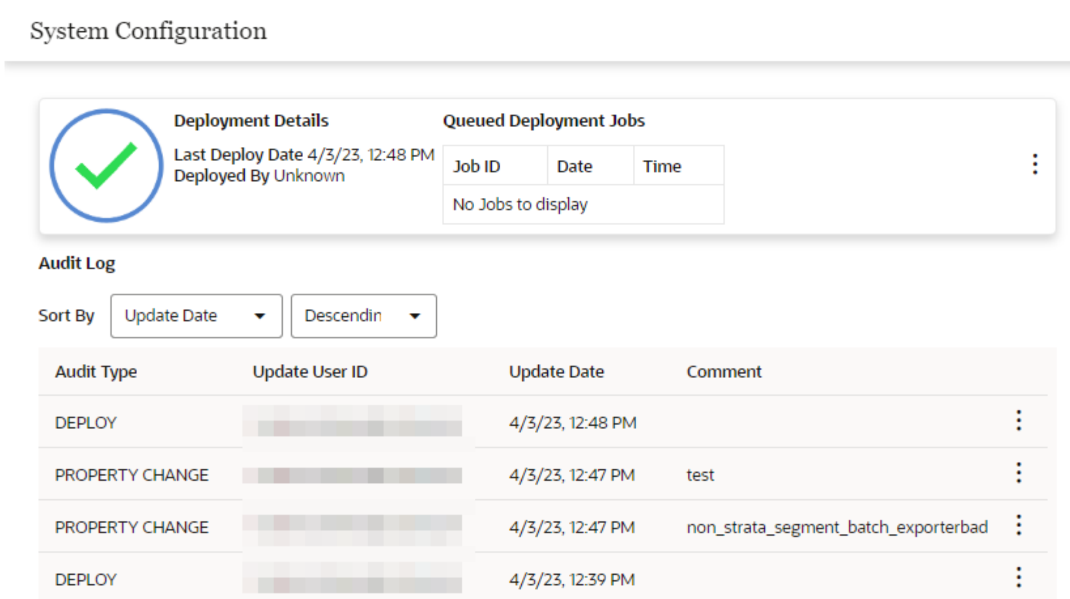
- Cancel Deploy - Revert any properties that are awaiting deployment.
- Deploy - Update the system with any configuration property changes made.
- Export File - Export one or more configuration files for subsequent upload and import to another organization. Requires System Administration authority.
- Import File - Import an uploaded configuration file. Requires System Administration authority.
- Refresh - Redisplay the configuration categories, refreshing with any updates.
- Rollback - Advance to a page displaying the date and time when changes were deployed and where it is possible to roll back the deployed changes. Requires System Administration authority.
- Upload File - Upload one or more configuration files prior to import. Requires System Administration authority.
- Upload Default File - Upload default base configuration Beanshell template file.

Audit Log

To access the Audit Log do the following:

1. Click the **Action** menu.
2. Click **Audit Log**. The Audit Log window displays.

Figure 14-65 Audit Log



Audit Type is the type of activity performed. Possible audit types include:

- CANCEL DEPLOY - A scheduled deployment was canceled.
- DEPLOY - One or more property changes were deployed.
- EXPORTED FILE - A user selected the Export File option. The audit record indicates whether the export was successful.

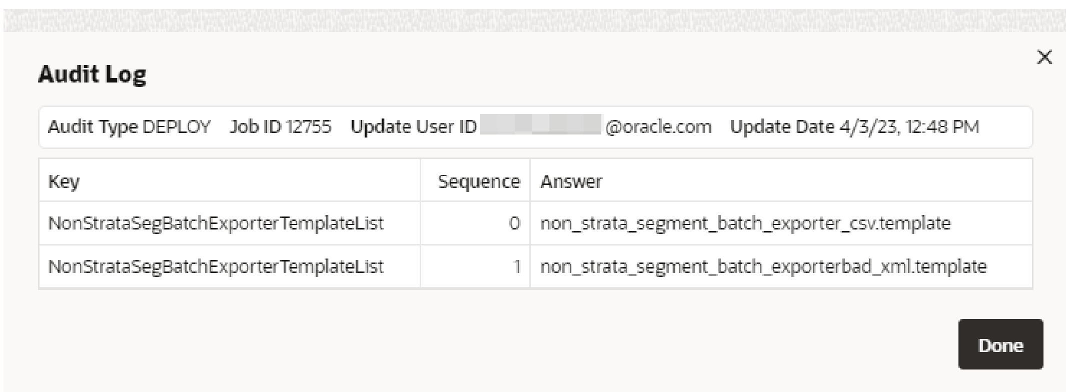
- IMPORT AUTHORIZATION - An imported configuration file was authorized.
- IMPORT FAILED - An uploaded configuration file could not be imported
- IMPORTED FILE - An uploaded configuration file was successfully imported
- PROPERTY CHANGE - A property setting was changed.
- ROLLBACK - The changes in a deployment were reverted back to the previous value.
- UPLOAD - A configuration file was uploaded.

Other fields in the Audit Log include:

- Update User ID - The user ID of the person performing the activity.
- Update Date - The date and time when the activity took place.
- Comment - The comment or reason entered by the user at the Enter Reason for Change window. Displayed for property changes, override changes, and rollbacks.

3. The Audit Log is sorted ascending or descending using the following Sort By options:
   - Audit Type
   - Update Date (default)
   - Update User ID
4. To view the Audit Log details, click the **Action** menu for the desired Audit Log and click **View**. The Audit Log appears.

Figure 14-66 Audit Log - Example



The Audit Log window displays the following information:

- Audit Type - The type of activity.
- Comment - The comment entered by the user at the Enter Reason for Change window, or assigned by the system for certain activities to indicate success or failure.
- Update User ID - The ID of the user performing the activity.
- Update Date - The date and time when the activity took place.

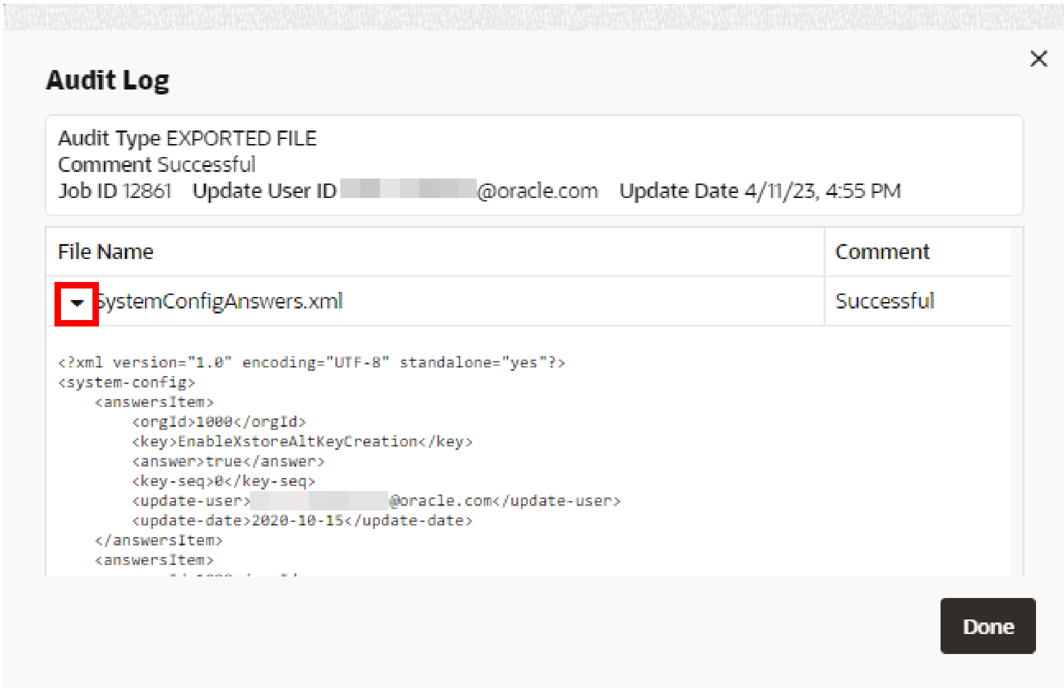
  Audit Log audit types include:

- DEPLOY Detail: For each property updated in the deployment:
  – Key - The unique key identifying the property updated.

  - Sequence - A unique number to identify each change in the deployment. Begins with 0 for each property updated.
  - Answer - The new setting for the property.
- EXPORTED FILE Detail:
  - File Name - The name of the configuration file to be exported.
  - Comment - Successful if the export succeeded; otherwise, indicates the reason for failure.
- IMPORT AUTHORIZATION Detail
  - File Name - The name of the imported configuration file.
  - Comment - Set to Authorized.
- IMPORT FAILED Detail
  - File Name - The name of the imported configuration file.
  - Comment - The reason for the failure.
- IMPORTED FILE Detail
  - File Name - The name of the imported configuration file.
  - Comment - Set to Successful.
- PROPERTY CHANGE Detail
  - Key - The unique key identifying the property
  - Seq - A unique number identifying the change in setting. Begins with 0 for the first entry for a property.
  - Answer - The changed setting for the property
- ROLLBACK Detail
  - Key - The unique key identifying the property
  - Seq - A unique number identifying a changed property. Begins with 0 for the first property included in the rollback.
  - Answer - The setting of the property after applying the rollback
- UPLOAD Detail
  - File Name - The name of the uploaded configuration file.
  - Comment - The number of records in the file.

5. In the **File Name** column, click the arrow (if present) to display the contents of the imported file.

Figure 14-67   Import File Contents



6. Click **Done** to close the window.
7. At any time you can refresh the results by clicking the System Configurations **Action** menu and then click **Refresh**.
8. To close the Audit Log click the System Configurations **Action** menu and then click **Return to Categories**.

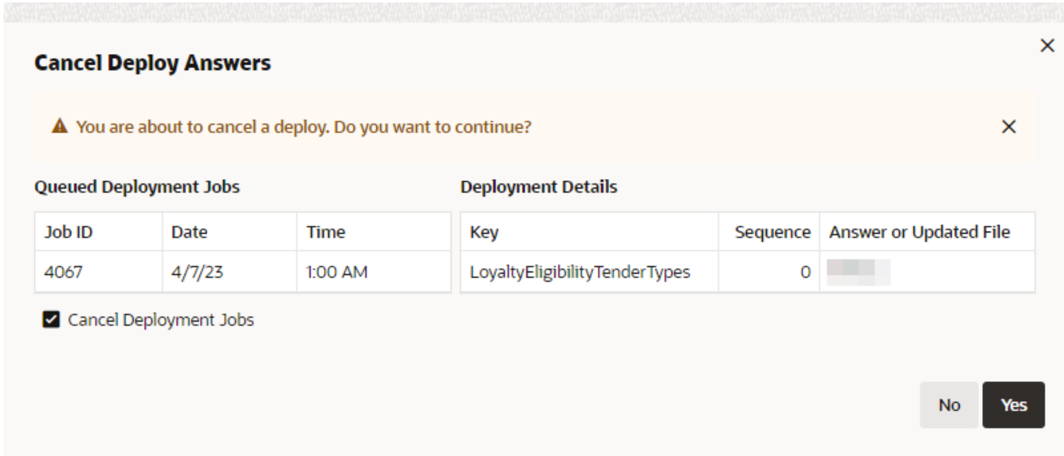
Cancel Deploy

You have the ability to cancel deploy configuration changes, so that you can control how changes are made to the system. To Cancel Deploy a job do the following:

1. Click the System Configuration **Action** menu and click **Cancel Deploy**. The Cancel Deploy Answers window displays.

> **Note:**
>
> You can cancel a deployment if it has not already run. This option is available only if: There are no outstanding errors. There is at least one changed property ready for deployment (either already in a scheduled deployment or updated since the most recent deployment). The system is not currently running a deployment.

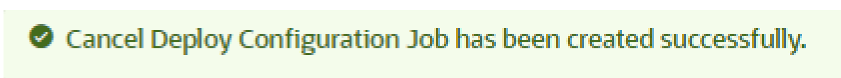
Figure 14-68   Cancel Deploy Answers



2. Click **Yes** to Cancel the job or **No** to close the window without saving. A notification appears indicating a successful cancel deployment is scheduled.

> **Note:**
>
> You can use this option even if you have not scheduled a deployment. In this case, the Cancel Deployment option discards any property changes you have applied since the most recent deployment.

Figure 14-69   Notification



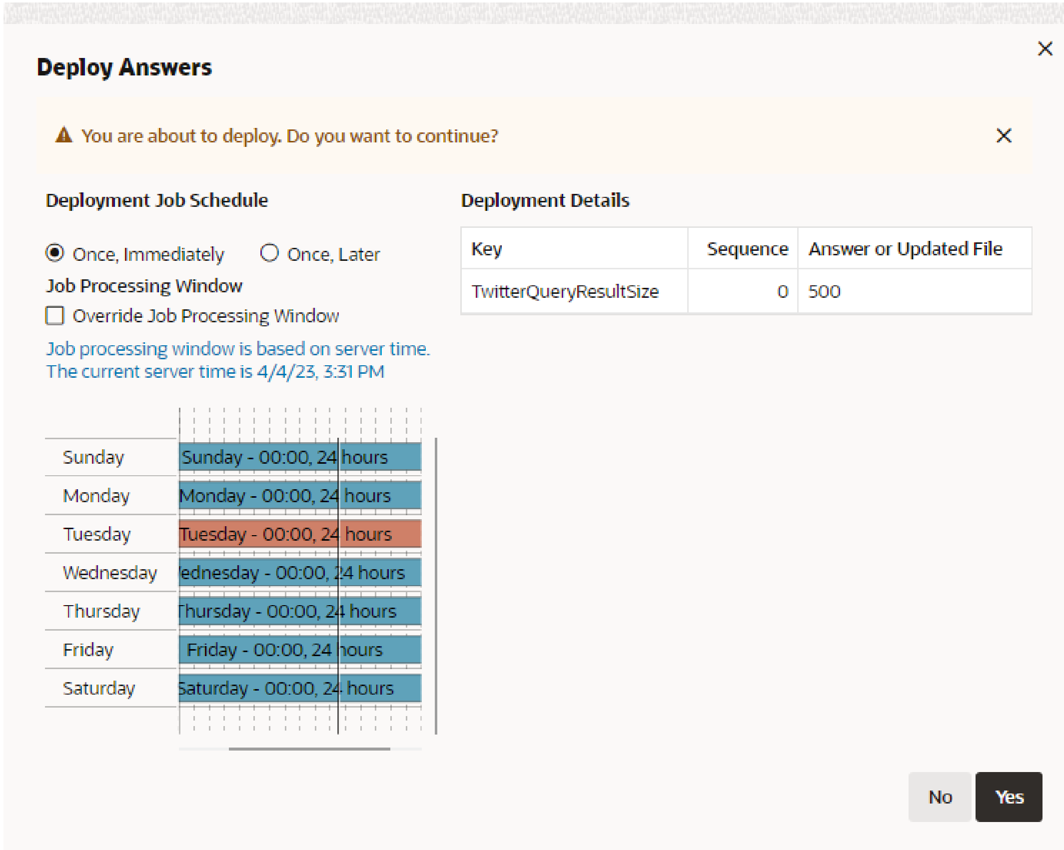
Deploy

You have the ability to deploy configuration changes, so that you can control how changes are made to the system. You will need to use the Deploy option to have any property changes take effect, including changes you make through the System Configuration pages as well as settings you have imported. To Deploy a job do the following:

1. Click the System Configuration **Action** menu and click **Deploy**. The Deploy Answers window displays.

> **Note:**
>
> You can only deploy if: There are no outstanding errors. There is at least one changed property ready for deployment The system is not currently running a deployment. If there are no errors, the Deploy Answers window opens.

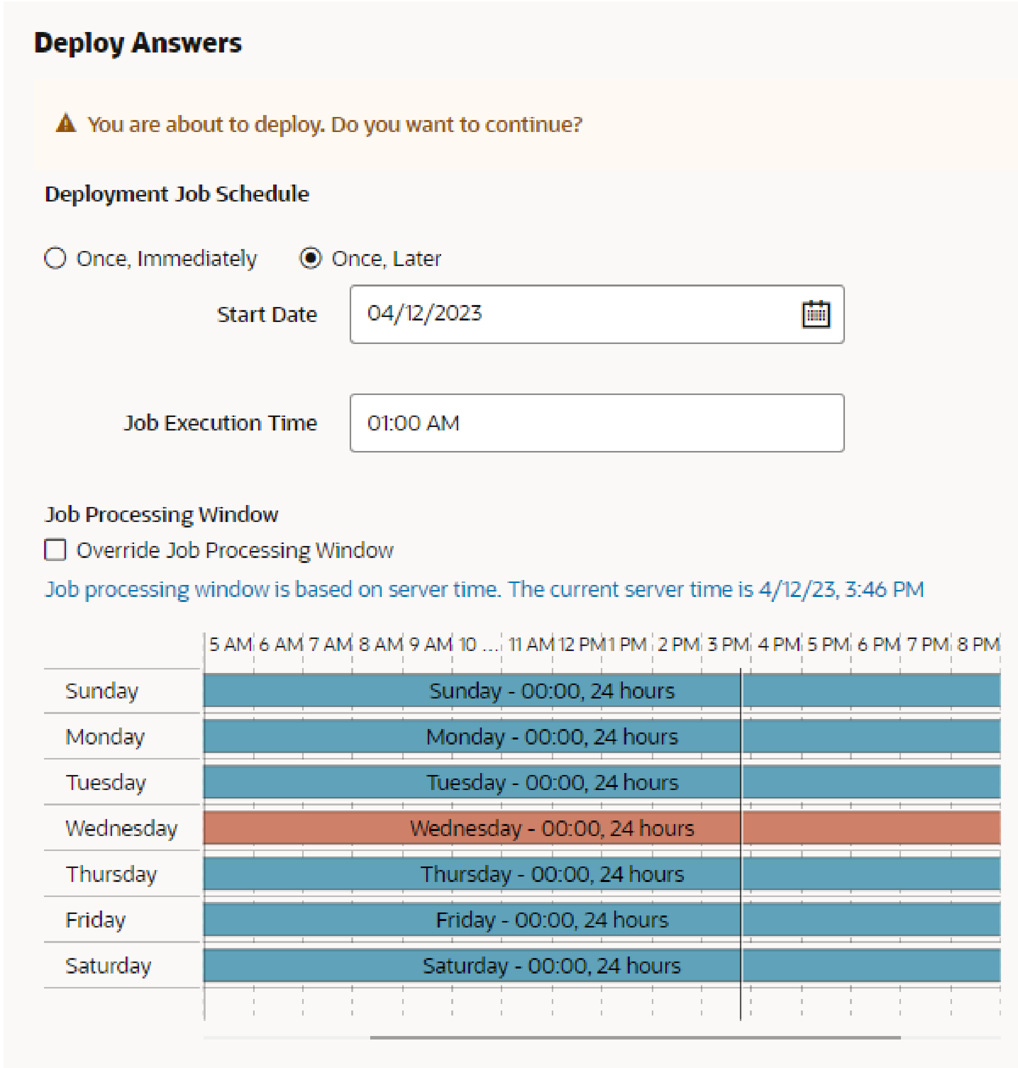
Figure 14-70 Deploy Answers



2. Enter the **Deployment Job Schedule**, options include:
   - Once, Immediately
   - Once, Later

> **Note:**
>
> If Once, Later is selected, additional options for Start Date and Job Execution Time are displayed.

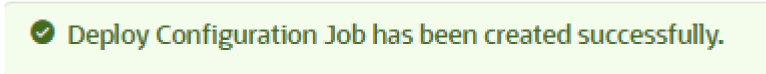
Figure 14-71 Once, Later - Deployment Job Schedule Options



3. View the Job Processing Window to see when Jobs are processed. Select the **Override Job Processing Window** check box if the selected date and time is not during the Job Processing Window for the date of the week when the deployment is scheduled. The displayed times are in the server time, which may differ from your local time.
4. Click **Yes** to Deploy the job or **No** to close the window without saving. A notification appears indicating a successful deployment is scheduled.

> **Note:**
>
> If a deployment is scheduled, the Status Indicator changes to indicate the progress of the deployment. You can use the Job Scheduling option to edit a scheduled deployment. If an additional deployment for the same property is scheduled for a later date and time, it can overwrite the first scheduled deployment.

Figure 14-72 Notification



Export File

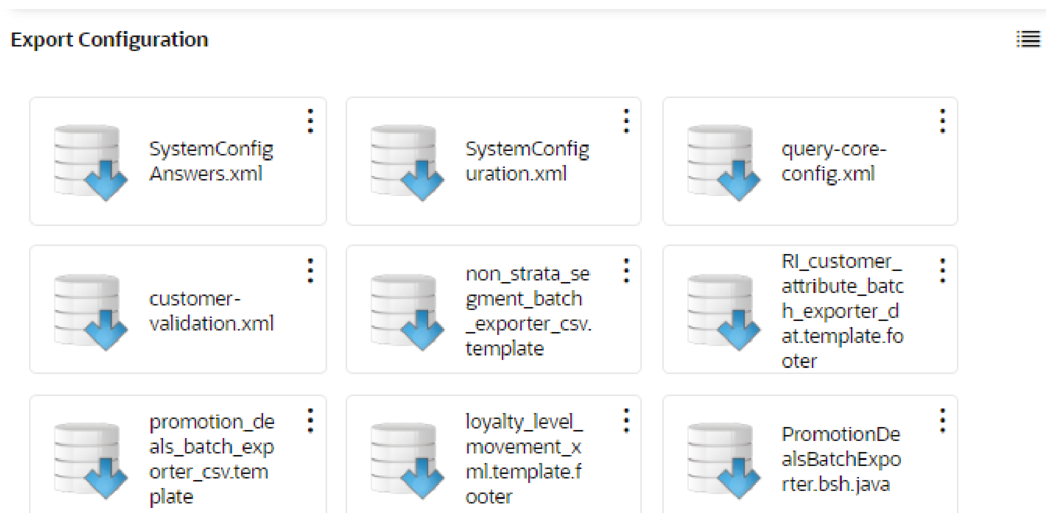
You can export configuration files for subsequent import into another Customer Engagement organization. The settings of the Allowable Answer Files for Export /Import and the Allowable Configuration Files for Export / Import, Allowable Query Core Configuration Files for Export / Import, Allowable Query Core Translation Files for Export / Import, Allowable Customer Validation Files for Export / Import, Beanshell Files and Template Files, control the allowable files.

See Oracle Customer Engagement Implementation Guide, "System/Configuration Properties" for more information on these properties.

To Export a configuration file do the following:

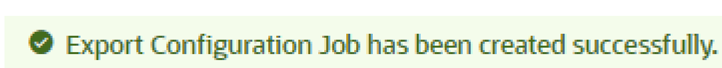
1. Click the System Configurations **Action** menu and then click **Export File**. The Export Configurations display.

Figure 14-73 Export Configuration



2. Click the tile to **Export**, or use the **Action** menu for that tile and click **Export**. A notification appears indicating the successful export.

Figure 14-74 Notification



Note:

You can now go to the Process Queue in the Job Management feature to view the details.

3. At any time you can refresh the results by clicking the System Configurations **Action** menu and then click **Refresh**.
4. To close the Export Configuration click the System Configurations **Action** menu and then click **Return to Categories**.

Import File

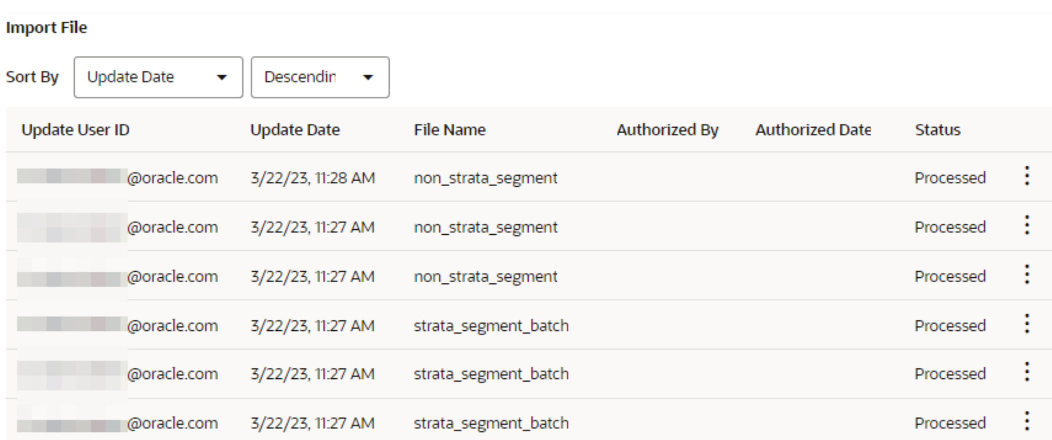
After you upload a configuration file, additional steps need to be completed before the settings are applied to the organization:

- The previously uploaded file must be authorized by a user who is different from the user who uploaded the file. See Authorize Import Window.
- Once the file is authorized, a user can import it. The import step can be completed by any user with sufficient authority, including the user who uploaded the file or the user who authorized the file. See Import Files Window.
- The changes need to be deployed; see Deploy.

To Import a configuration file do the following:

1. Click the System Configurations **Action** menu and then click **Import File**. The Import File list displays.

Figure 14-75 Import File List



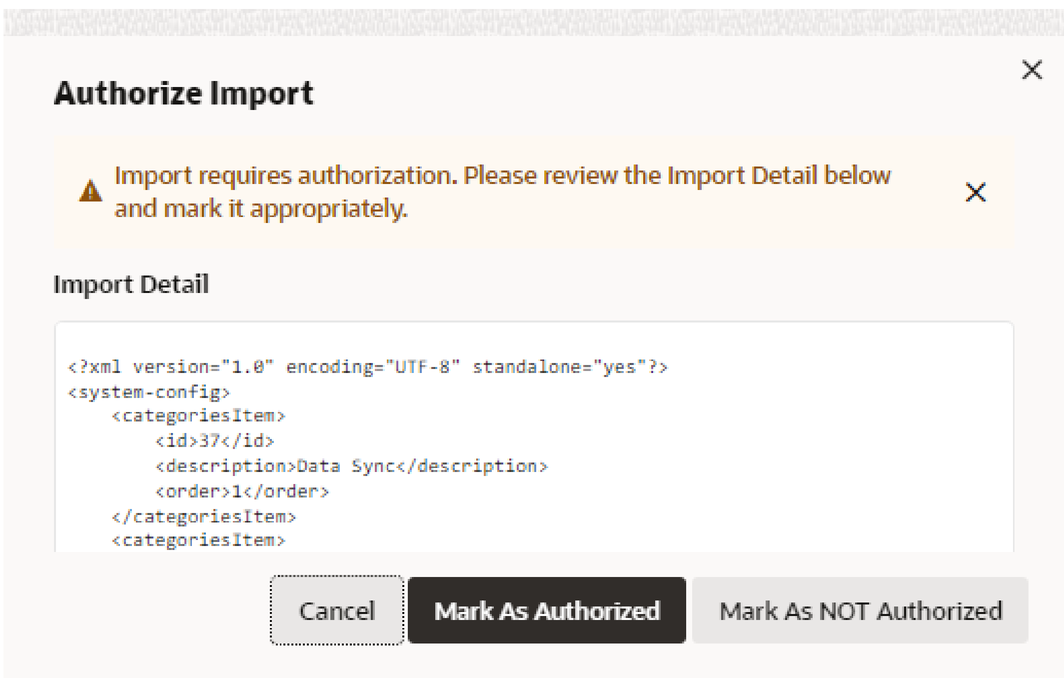
The Import File page displays the following information on uploaded configuration files:

- Update User ID: The user ID of the person who uploaded the file
- Update Date: The date and time when the file was uploaded
- File Name: The name of the configuration file that was uploaded
- Authorized By: The user ID of the person who authorized the import

- Authorized Date: The date and time when the import was authorized
- Status: The current status of the import. Possible statuses are:
  – Waiting Authorization: You can click on the configuration file to import it only if you are not the user who uploaded the file
  – Authorized: You can click on the configuration file to import it
  – Not Authorized: The file cannot be imported
  – Processed: The file has already been imported

2. The Import File list is sorted ascending or descending using the following Sort By options:
   - Authorized By
   - Authorized Date
   - File Name
   - Status
   - Update Date (default)
   - Update User ID
3. Only files with the status of **Waiting Authorization** can be authorized. Click the **Action** menu for the file and click **Authorize**. The Authorize Import window displays.

Figure 14-76 Authorize Import



The Authorize Import window displays the contents of a previously uploaded configuration file, and indicates your options:

- Actions if Status is Waiting Authorization and User Did Not Upload the File - If you are not the user who uploaded the file and the status is Waiting Authorization, you can update the authorization status after examining the contents of the file, or mark the file as not authorized.

- Actions if Status is Waiting Authorization and User Has Uploaded the File - If you are the user who uploaded the file and the status is Waiting Authorization, you cannot update the status of the file.
- Actions if Status is Not Authorized - If the status is Not Authorized, you cannot change the status.
- Actions if Status is Processed - If the status is Processed, you cannot change the status.

4. After reviewing the Import Details, either:
   - Mark As Authorized: The configuration file can be imported. Select this status only after examining the contents of the file and confirmed that the contents are correct. Click **Mark As Authorized** to authorize the file, a notification appears.

     Figure 14-77 Notification

   - Mark as Not Authorized: The configuration file cannot be imported. Select this status if the contents of the file are not correct.. Click **Mark as NOT Authorized** to indicate the file is not authorized for import.
   - Click **Cancel** to exit the window.

   > **Note:**
   >
   > Using the Authorize action on any other file status will open the Import Details for viewing. Click **Cancel** to close the window.

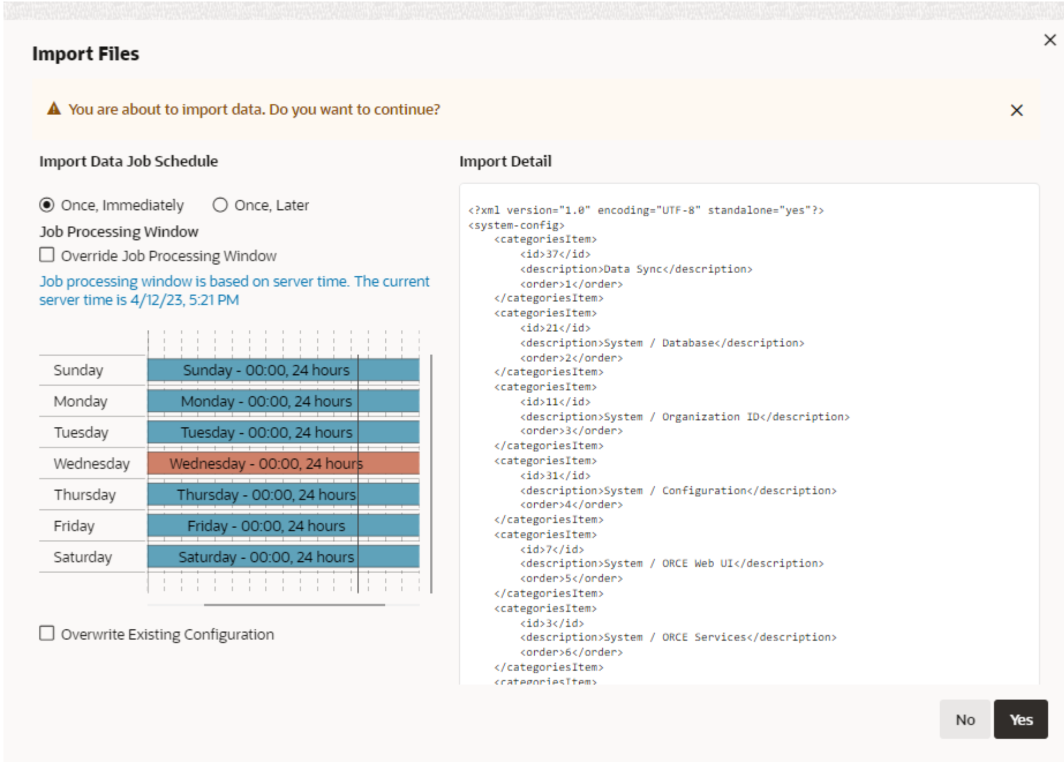
5. At any time you can refresh the results by clicking the System Configurations **Action** menu and then click **Refresh**.
6. Click the **Vertical Ellipse** for any Authorized file.

   > **Note:**
   >
   > The Import Files window displays the contents of a previously uploaded configuration file, and indicates your options for importing the file. You can open this window by clicking an uploaded file at the Import File page only if the current status is Authorized. This window is available regardless of whether you were the user who uploaded or authorized the import.

7. Click **Import**.

   The Import Files window appears.

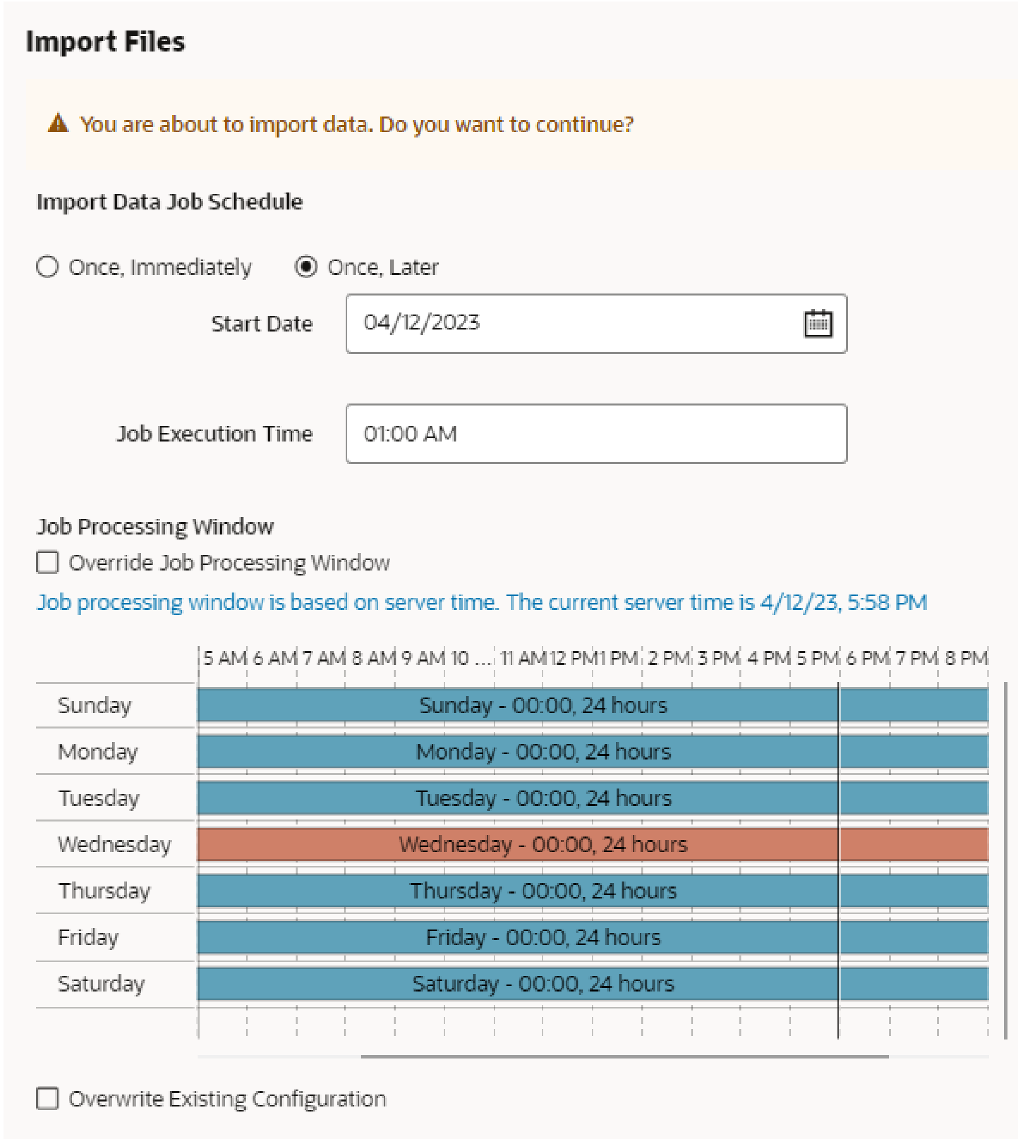
Figure 14-78 Import Files



8. Enter the **Deployment Job Schedule**, options include:
   - Once, Immediately - The deployment runs immediately.
   - Once, Later - The deployment is scheduled for a later time.

   > **Note:**
   >
   > If Once, Later is selected, additional options for Start Date and Job Execution Time are displayed.

Figure 14-79 Once, Later - Import Data Job Schedule Options



9. View the **Job Processing Window** to see when Jobs are processed.
   a. Select the **Override Job Processing Window** check box if the selected date and time is not during the Job Processing Window for the date of the week when the deployment is scheduled. The displayed times are in the server time, which may differ from your local time.
   b. Select the **Start Date**: The date when the deployment should run.
   c. Select the **Job Execution Time**: The hour, minute, and AM or PM.
   d. The Overwrite Existing Configuration is used when there is existing data in the database. You must select the **Overwrite Existing Configuration** option to have the import process successfully.
10. Click **Yes** to schedule the Data Job or **No** to close the window without saving. A notification appears indicating a successful Data Job is scheduled.

> **Note:**
>
> If an import is scheduled, the Status Indicator changes to indicate the progress of the import. You can use the Job Scheduling option to edit the scheduled import. If an additional import is scheduled for a later date and time, it overwrites the first scheduled import.

Figure 14-80 Notification

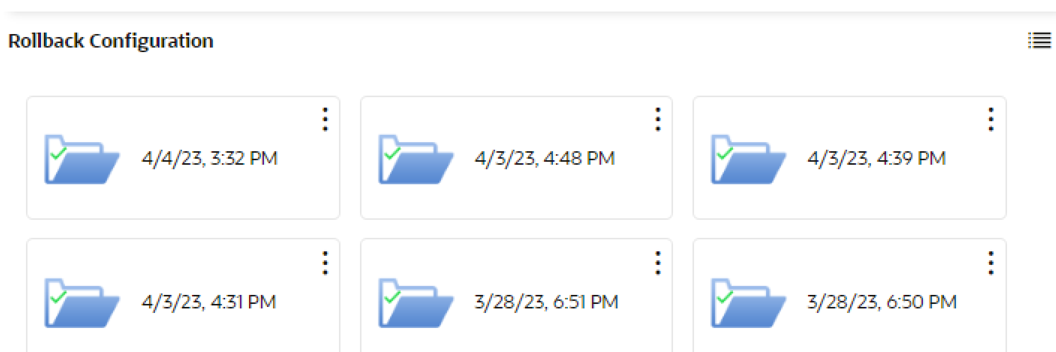
11. To close Import File click the System Configurations **Action** menu and then click **Return to Categories**.

Rollback

To Rollback a configuration do the following:

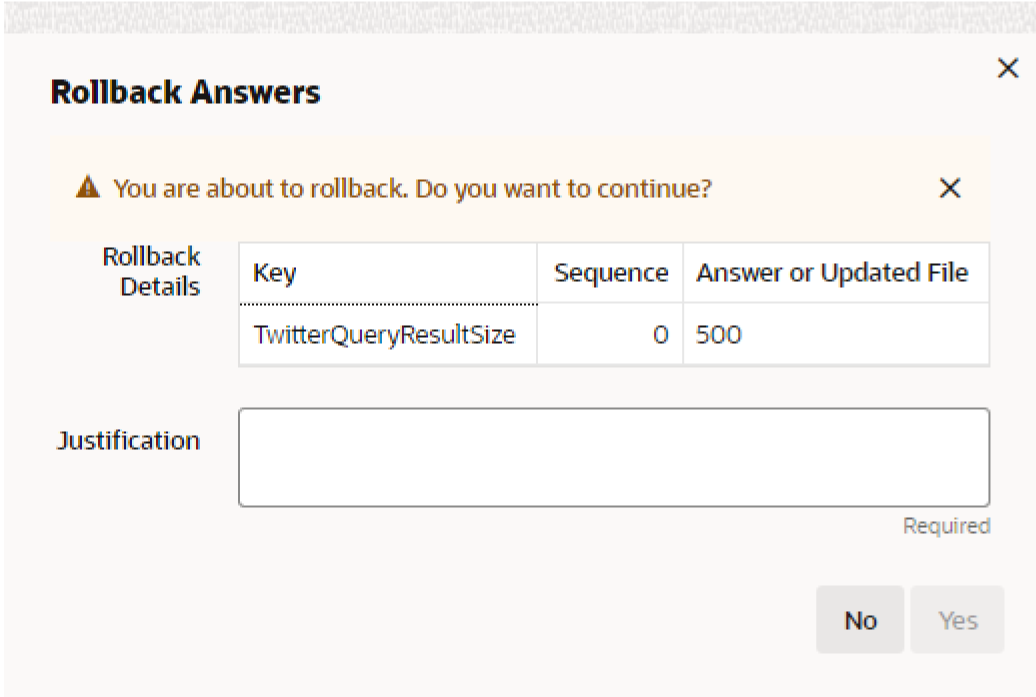
1. Click the System Configurations **Action** menu and then click **Rollback**. The Rollback Configuration displays. This screen displays each deployment of configuration changes in reverse chronological order (newest to oldest), indicating the date and time of the deployment.

Figure 14-81 Rollback Configuration



2. To rollback to the settings before a deployment, click a **Deployment Record**.. The Rollback Answers window displays.

Figure 14-82 Rollback Answers



3. Enter a **Justification**.
4. Click **Yes** to Rollback, or **No** to close the window without saving.

> **Note:**
>
> If you click **Yes**, you will need to complete the Enter Reason for Change window. This reason is displayed in the Comment column of the Audit Log screen.

Figure 14-83 Notification

5. At any time you can refresh the results by clicking the System Configurations **Action** menu and then click **Refresh**.
6. To close the Rollback Configuration click the System Configurations **Action** menu and then click **Return to Categories**.

Upload File

You can upload configuration files for subsequent import.

The settings of the Allowable Answer Files for Export /Import and the Allowable Configuration Files for Export / Import, Allowable Query Core Configuration Files for Export / Import, Allowable Query Core Translation Files for Export / Import, Allowable Customer Validation Files for Export / Import, Beanshell Files and Template Files, control the allowable files.

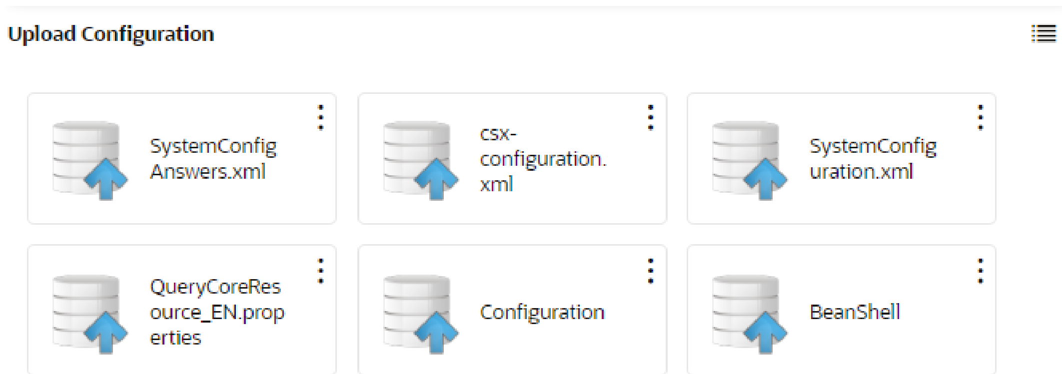
See Oracle Customer Engagement Implementation Guide, "System/Configuration Properties" for more information on these properties.

The upload process verifies that the selected file matches the name specified in the related property, and that the contents of the file appear to be valid. For example, the organization ID must match the ID of the environment where the upload is taking place.

To upload a file configuration do the following:

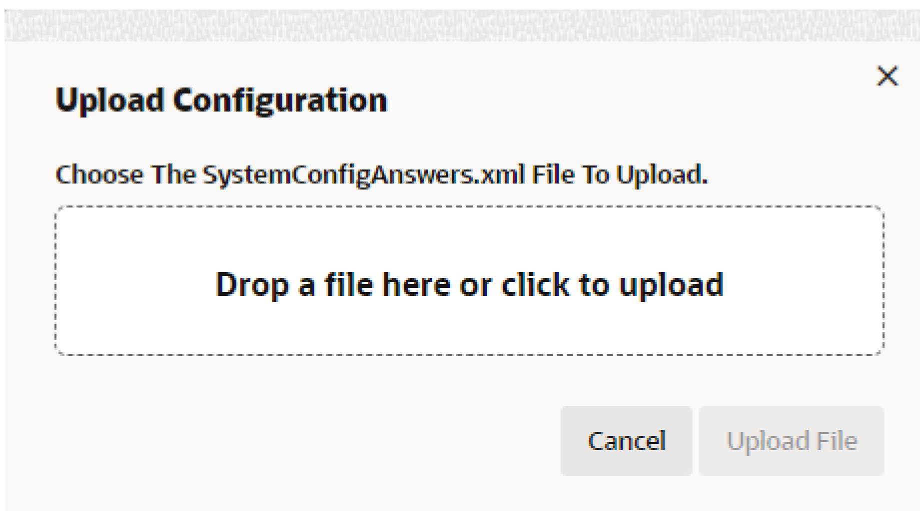
1. Click the System Configurations **Action** menu and then click **Upload File**. The Upload Configurations display.

Figure 14-84 Upload Configuration



2. Click the tile to **Upload**, or use the **Action** menu for that tile and click **Upload**. The Upload Configuration window displays.

Figure 14-85 Upload Configuration



3. To add a file to upload, either:
   - Drag and Drop a file as shown in Figure 14-85.
   - Click anywhere in the Drop a file here or click to upload box.
4. Click **Upload File** to upload the file, or **Cancel** to close the window without saving.
5. At any time you can refresh the results by clicking the System Configurations **Action** menu and then click **Refresh**.

6. To close the Upload Configuration click the System Configurations **Action** menu and then click **Return to Categories**.

Upload Default File

You can upload the default configuration/beanshell/template files and then import them to revert to the default/base configurations.

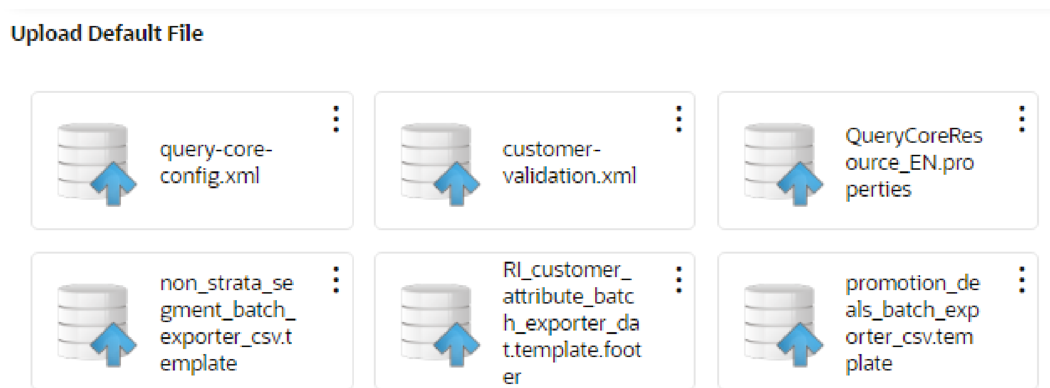
The settings of the Allowable Query Core Configuration Files for Export / Import, Allowable Query Core Translation Files for Export / Import, Allowable Customer Validation Files for Export / Import, Beanshell Files and Template Files control the allowable files.

See Oracle Customer Engagement Implementation Guide, "System/Configuration Properties" for more information on these properties.

To upload default configuration/beanshell/template files that revert to the default/base configurations do the following:

1. Click the System Configurations **Action** menu and then click **Upload Default File**. The Upload Default Files display.

Figure 14-86 Upload Default File



2. Click the tile to **Upload**, or use the **Action** menu for that tile and click **Upload Default File**. A notification appears.

Figure 14-87

3. At any time you can refresh the results by clicking the System Configurations **Action** menu and then click **Refresh**.
4. To close the Upload Default Files click the System Configurations **Action** menu and then click **Return to Categories**.

System Logs

Users who have the System admin role can view the log events. Log events include:

- Access
- Data Privacy Audit

- Duplicate Customer Merge
- File Reader
- File Transfer
- Loyalty Points
- Promote
- Promotions
- Quartz
- Services
- User Roles
- Web Services

Viewing System Logs

To access the System Logs do the following:

1. Click **Menu**.
2. Click the **Admin** task.
3. Click the **System Logs** task. The System Logs window displays.

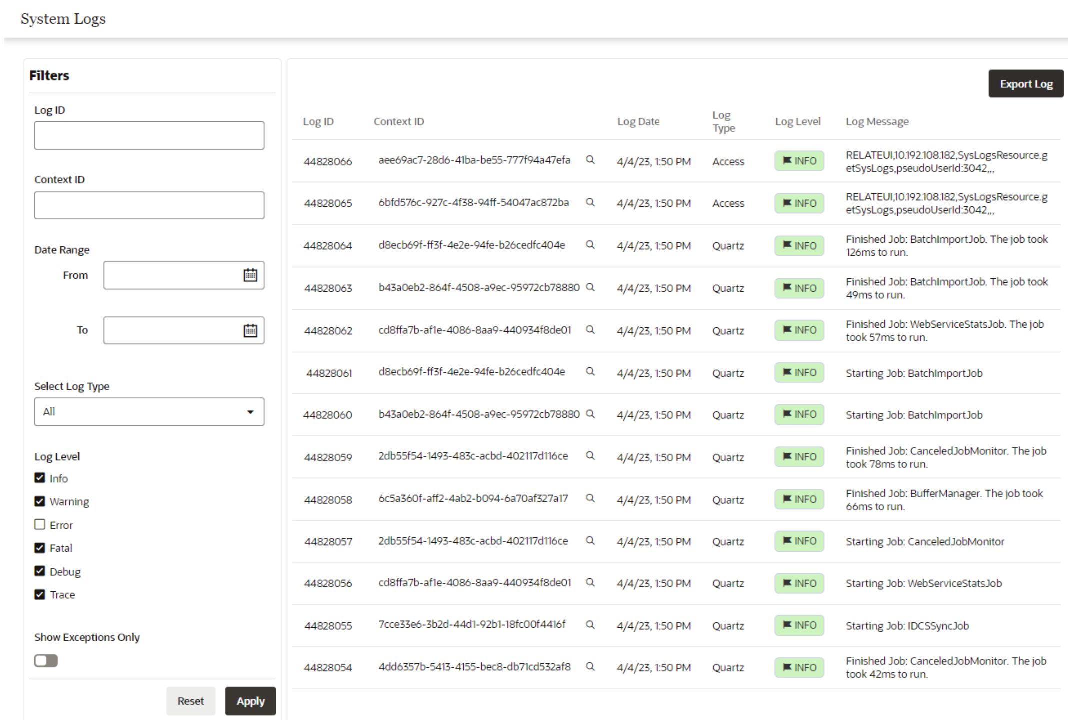
   The following fields are displayed:

   - **Log ID** – ID of the log.
   - **Context ID** – Diagnostic context information to correlate messages coming from a specific request or application.
   - **Log Date** – The date and time the log event was generated.
   - **Log Type** – The particular log containing the log event.
   - **Log Level** – The level of the log event recorded.

     Colors as well as text are used to indicate the severity. They include:

     – **Info** - Pale Green
     – **Warning** - Pale Yellow
     – **Error** - Pale Red
     – **Fatal** - Red
     – **Debug** - Cyan
     – **Trace** - Grey
   - **Log Message** – The error message and first line of the recorded log event.

Figure 14-88 System Logs



4. The Filters panel enables you to enter criteria to filter for a specific system log. Enter the desired filter criteria which includes the following fields:
   - **Log ID** – The log event sequence number.
   - **Context ID** – Diagnostic context information to correlate messages coming from a specific request or application.
   - **Date Range From and To** – The date range covering the log event.
   - **Select Log Type** – The particular log containing the log event. Default is All.
     - Access
     - Data Privacy Audit
     - Duplicate Customer Merge
     - File Reader
     - File Transfer
     - Loyalty Points
     - Promote
     - Promotions
     - Quartz
     - Services
     - User Roles
     - Web Services
   - **Log Level** – The level of the log event recorded. Default is to show all.

     Log levels include:

  - INFO
  - WARNING
  - ERROR
  - FATAL
  - DEBUG
  - TRACE
- **Show Exceptions Only** – Whether to show log events where an exception has been recorded or to show all log events. Default is Exception Only.

5. Click **Apply** to apply the filter criteria or, click **Reset** to clear any criteria changes back to the default filter criteria settings.

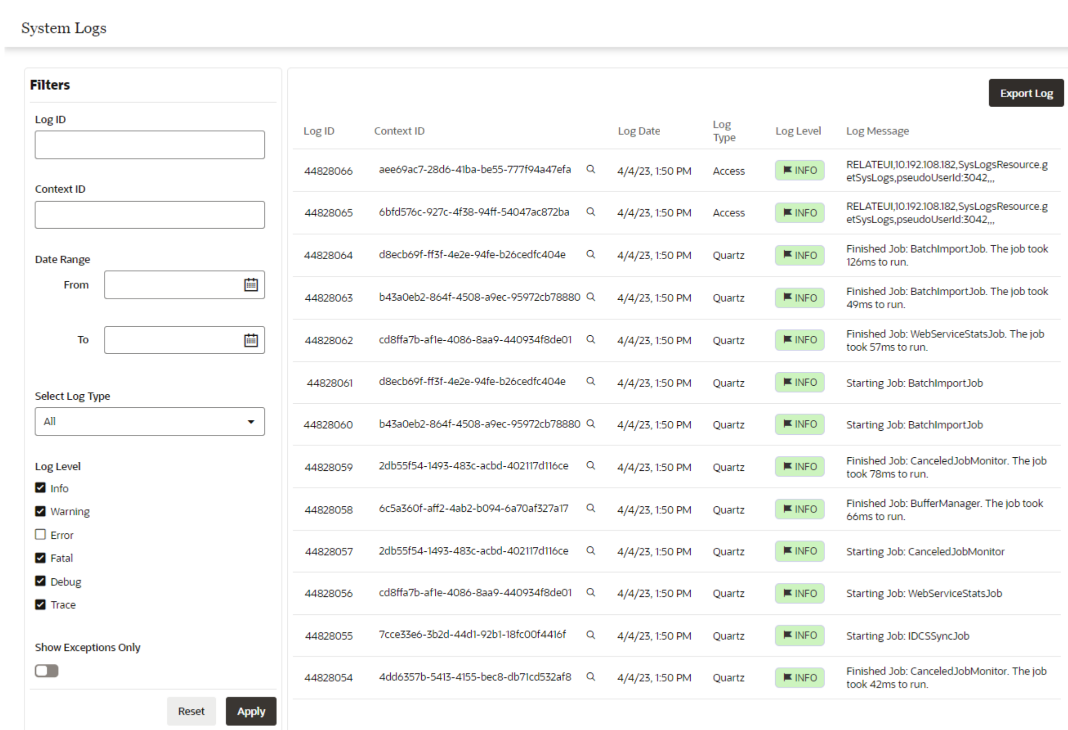
Exporting System Logs

Using the Export Log button creates an immediate job to export the log events to a downloadable file based on the filter criteria.

To export a system log perform the following actions:

1. Navigate to the **System Logs** window.
2. Enter the desired **filter criteria** for a specific system log or logs.
3. Click **Apply** to apply the filter criteria or, click **Reset** to clear any criteria changes back to the default filter criteria settings.
4. Click **Export Log**.

Figure 14-89 Exporting Logs



> **Note:**
>
> A message appears indicating success or failure.

Figure 14-90 Success Notification

The download link will be attached to the “Export System Logs" job in the task information panel found in the Job Management process queue.

The exported file will contain a file header:

```
>>>> Report Based On Criteria - , Log ID: Not specified From Date: Not specified,
To Date: Not specified, Log Levels: [INFO, WARN, ERROR, FATAL, DEBUG, TRACE], Log
Type: ALL, Context ID: Not specified <<<<
```

The header details the selection criteria used to generate the report.

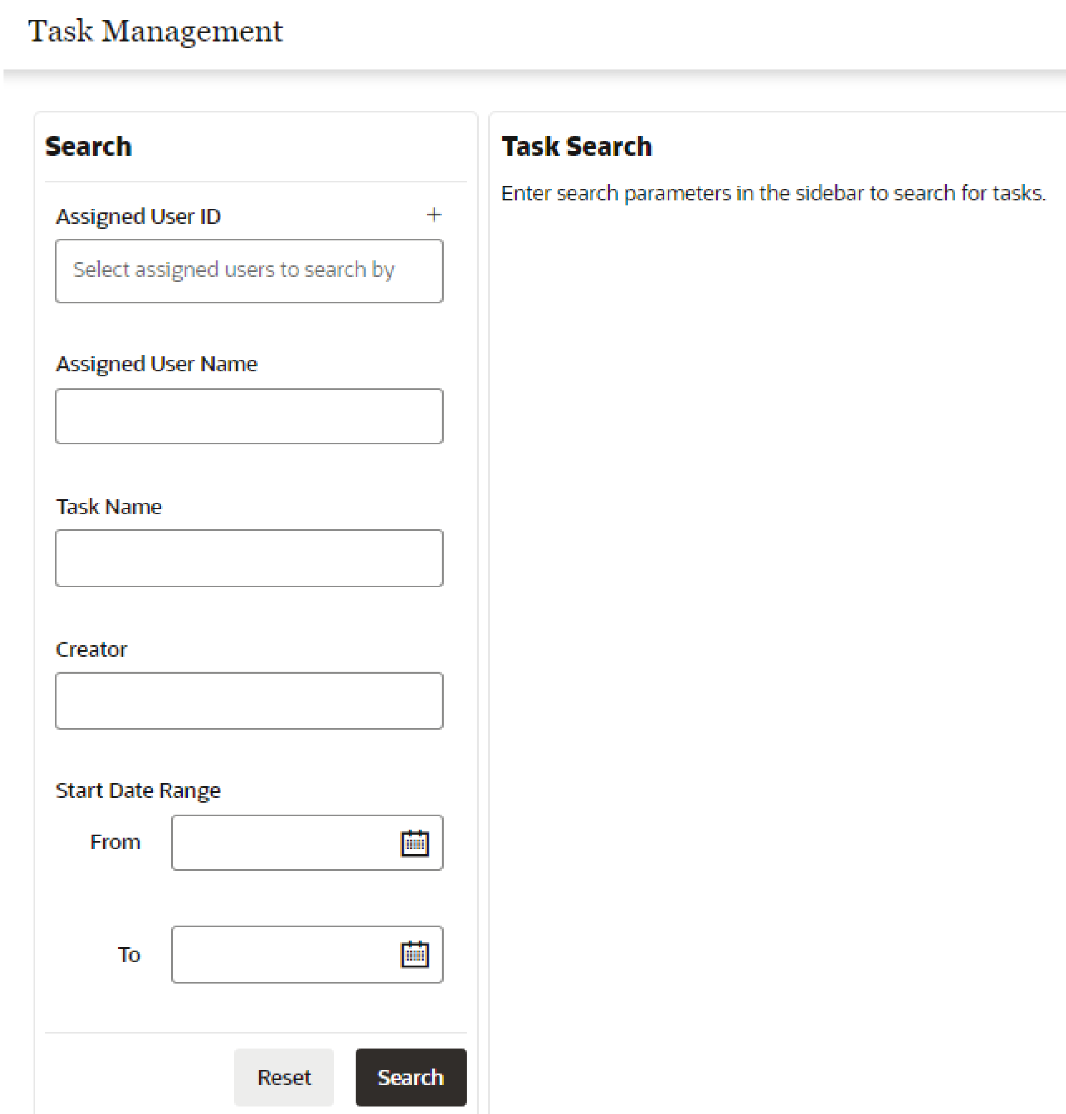
The report detail contains the same information as displayed in the UI.

Task Management

Use the Task Management window to search for tasks, as well as to add, edit, and assign tasks. To access the Task Management window:

1. Click **Menu**.
2. Click the **Admin** task.
3. Click the **Task Management** task. The Task Management window displays.

Figure 14-91 Search Panel Options



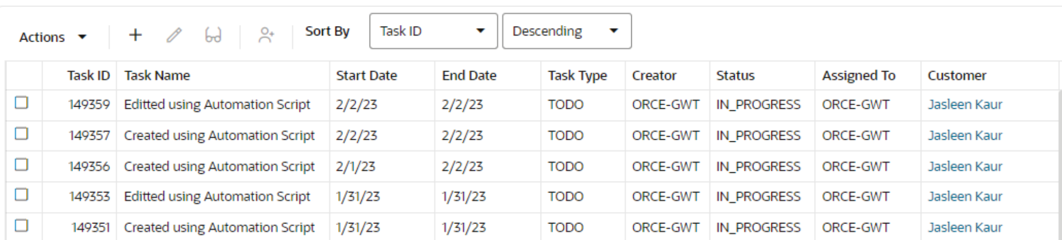
4. The Search panel enables you to enter criteria to search for a specific task. Enter the desired search criteria which includes the following fields:
   - **Assigned User ID** – ID of the assigned user
   - **Assigned User Name** – Name of the assigned user
   - **Task Name** – Name of the Task
   - **Creator** – ID of the user who created the Task
   - **Start Date Range From and To** – Dates on which the Range starts
   - **End Date Range From and To** – Dates on which the Range ends
   - **Task ID** – ID of the Task
   - **Task Type** – Type of Task
   - **Status** – Status of the task
   - **Priority** – The priority assigned to the task

- **Location** – Location of the task
- **Event** – The promotion assigned to the task
- **Assigned Customer ID** – ID of the assigned customer
- **First Name** – First name of the customer
- **Last Name** – Last name of the customer

5. Click **Search** to see the results.

> **Note:**
>
> The results will remain the same if the **Reset** button is clicked. The Reset button only clears the previously entered search criteria. The results will only refresh when another search is completed.

Figure 14-92 Results Pane



	Task ID	Task Name	Start Date	End Date	Task Type	Creator	Status	Assigned To	Customer
☐	149359	Editted using Automation Script	2/2/23	2/2/23	TODO	ORCE-GWT	IN_PROGRESS	ORCE-GWT	Jasleen Kaur
☐	149357	Created using Automation Script	2/2/23	2/2/23	TODO	ORCE-GWT	IN_PROGRESS	ORCE-GWT	Jasleen Kaur
☐	149356	Created using Automation Script	2/1/23	2/2/23	TODO	ORCE-GWT	IN_PROGRESS	ORCE-GWT	Jasleen Kaur
☐	149353	Editted using Automation Script	1/31/23	1/31/23	TODO	ORCE-GWT	IN_PROGRESS	ORCE-GWT	Jasleen Kaur
☐	149351	Created using Automation Script	1/31/23	1/31/23	TODO	ORCE-GWT	IN_PROGRESS	ORCE-GWT	Jasleen Kaur

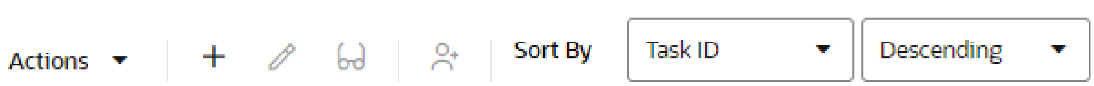
The following information is displayed for each task:

- **Task ID** – The ID of the task.
- **Task Name** – The name of the task.
- **Start Date** – The date the task starts.
- **End Date** – The date the task ends.
- **Task Type** – The type of task.
- **Creator** – User who created the task.
- **Status** – The status of the task.
- **Assigned To** – The associate to whom the task is assigned.
- **Customer** – Name of the customer.

Sorting Results

Once the results appear the user can sort the list to refine the results. The following sorting options include:

Figure 14-93 Sort By Options



The following fields are sorted Ascending or Descending:

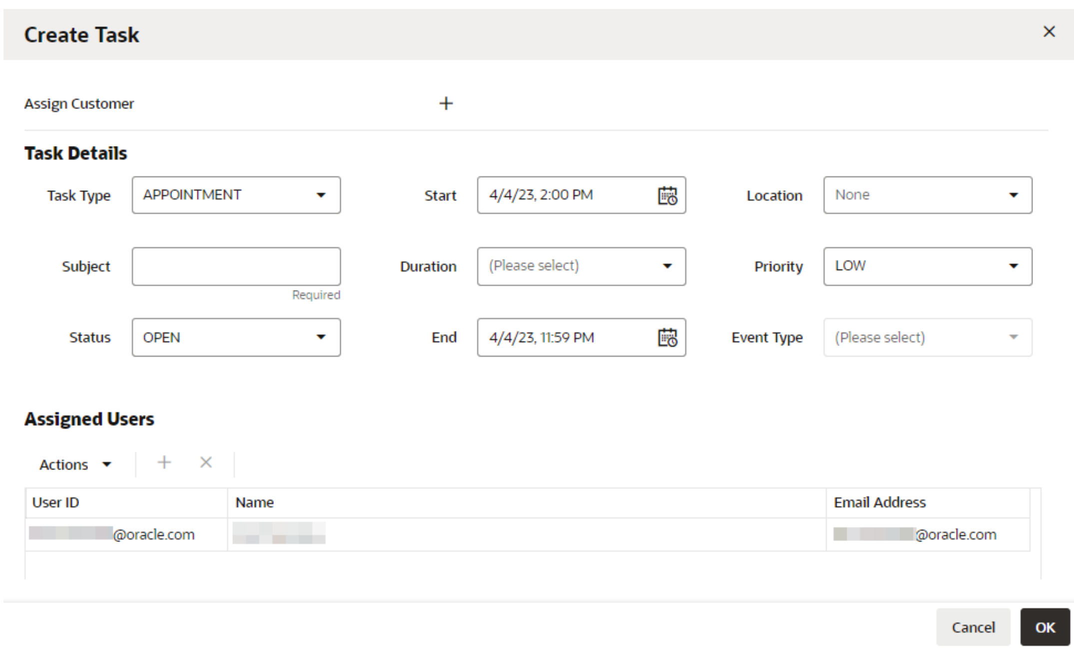
- **Assigned To** – The associate to whom the task is assigned.
- **Creator** – User who created the task.
- **Customer** – Name of the customer.
- **End Date** – The date the task ends.
- **Start Date** – The date the task starts.
- **Status** – The status of the task.
- **Task ID** – The ID of the task.
- **Task Name** – The name of the task.
- **Task Type** – The type of task.

Creating a Task

Users with the appropriate access level can add a task. To Create a Task:

- Click the **Add (+) icon**, or choose **Add** from the **Actions** menu. This displays a Create Task window.

Figure 14-94 Create Task

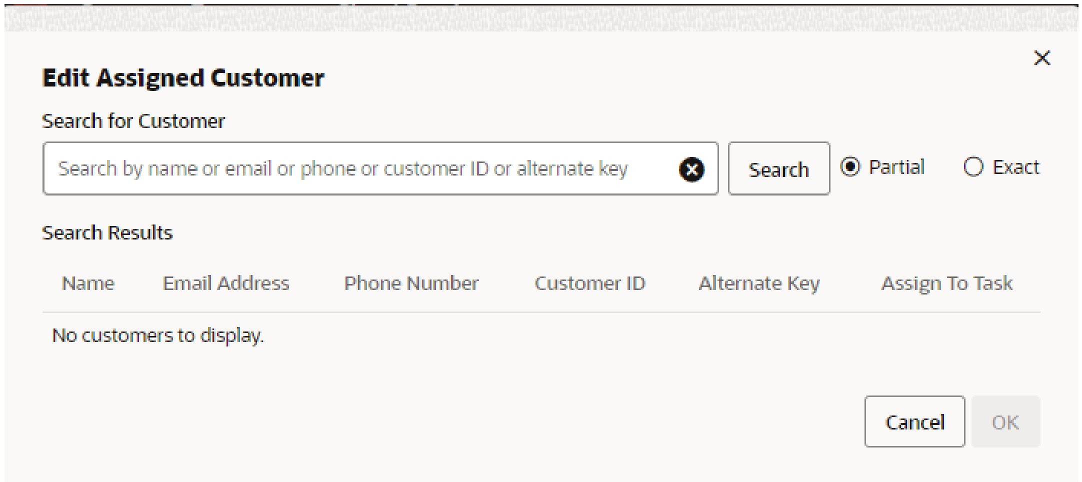


Assigning Customers

To assign Customers, do the following:

1. Click the **Assign Customer +** icon to assign a customer to the Task (optional).

Figure 14-95 Edit Assigned Customer

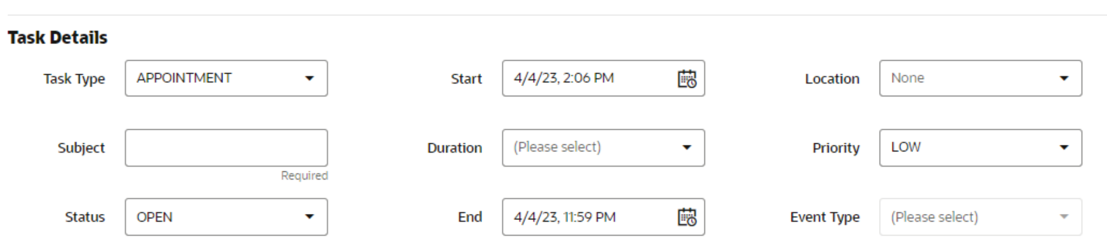


2. Enter some or all of a **customer's name** in the Search for Customer field. The user can search by any of the criteria shown in the search results including:
   - Name
   - Email Address
   - Phone Number
   - Customer ID
   - Alternate Key
3. Select **Partial**, if you want to results that match part of what you enter, or select **Exact** if you only want results that are an exact match.
4. Click **Search**.
5. Click **Assign** to assign the customer to the task.
6. Click **OK** to save the assignment or **Cancel** to return to the Task Details without saving any customer assignments.

Task Details

Enter the Task Details which include the following fields:

Figure 14-96 Task Details



- **Task Type** – Type of task (required field)

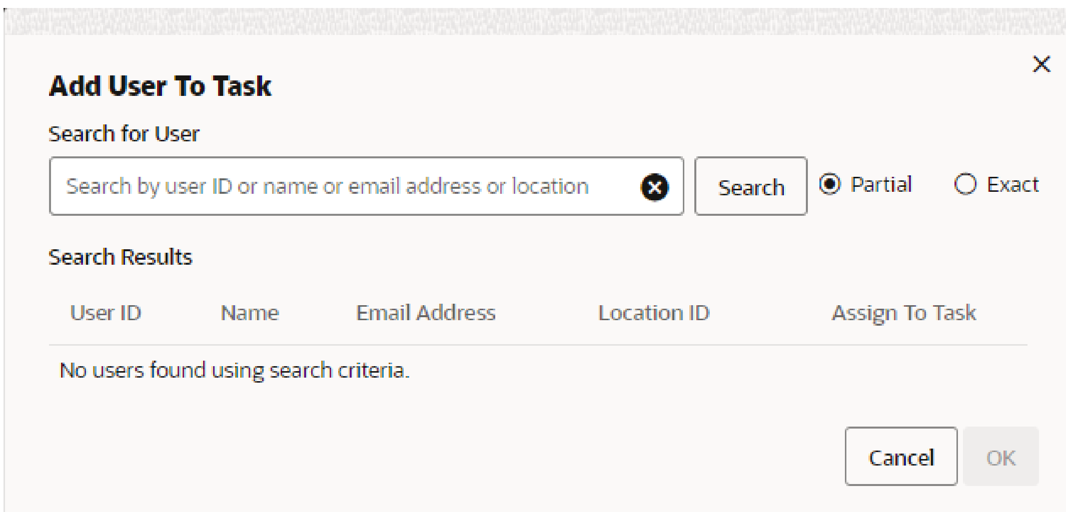
- **Subject** – The subject of the task (required field)
- **Status** – The status of the task (required field)
- **Start** – The date and time the task starts (required field)
- **Duration** – The duration of the task
- **End** – The date and time the task ends (required field)
- **Location** – The location of the task
- **Priority** – The priority assigned to the task (required field)
- **Event Type** – Type of event (only used for Event Type tasks)

Assigning Users

To Assign Users, do the following:

1. Click the **Actions** menu and click **Add** or click the **Add (+)** icon.

Figure 14-97 Add User to Task



2. Enter some or all of a **user's name** in the Search for User field. The user can search by any of the criteria shown in the search results including:
   - User ID
   - Name
   - Email Address
   - Location ID
3. Select **Partial**, if you want to results that match part of what you enter, or select **Exact** if you only want results that are an exact match.
4. Click **Search**.
5. Click **Assign** to assign the user to the task.
6. Click **OK** to save the assignment or **Cancel** to return to the Task Details without saving any user assignments.

Deleting Users

To delete users, do the following:

1. Highlight a **user** from the Assigned Users section.
2. Click **Remove** from the **Actions Menu** or click the **X** icon.

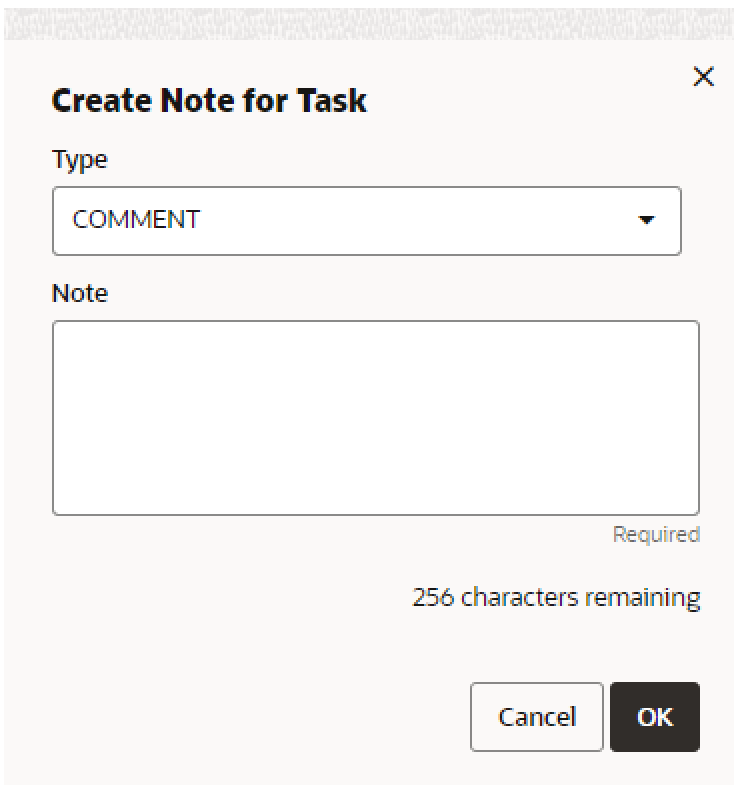
> **Note:**
>
> To immediately remove the user, click **X**.

Task Notes

To add a Task Note, do the following:

1. Click **Add** from the **Actions Menu** or click the **+** icon.

Figure 14-98   Create Note for Task



2. Select a note **Type** (required field).
3. Enter information in the Note field (required field)
4. Click **OK**.
5. To edit a note, highlight a **note** in Task Notes section and click **Edit** from the **Actions Menu** or click the **Edit** icon.

6. **Edit** the note.
7. Click **OK** to accept the changes or **Cancel** to close without saving.
8. To delete a note, highlight a **note** in Tasks Notes section and click **Delete** from the **Actions Menu** or click the **X** icon.

> **Note:**
>
> To immediately remove the user, click **X**.

Task Confirmation

9. Click **OK** to create a task or **Cancel** to close the Create Task window without saving any changes.

Editing a Task

To edit a task use the following steps:

1. Highlight a **Task** row.
2. Click the **Action Menu**, and then click **Edit**, or click the **Edit** icon.
3. **Edit** the Task.
4. Click **OK** to accept the changes or **Cancel** to close the task without saving.

Viewing a Task

To view a task use the following steps:

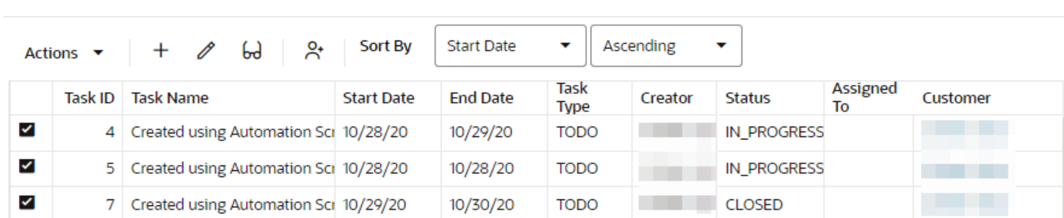
1. Highlight a **Task** row.
2. Click the **Action Menu**, and then click **View**, or click the **Eyeglasses** icon.
3. Click **Done** to close the window.

Reassigning a Task

Users with the appropriate permissions can reassign a task. To reassign a task:

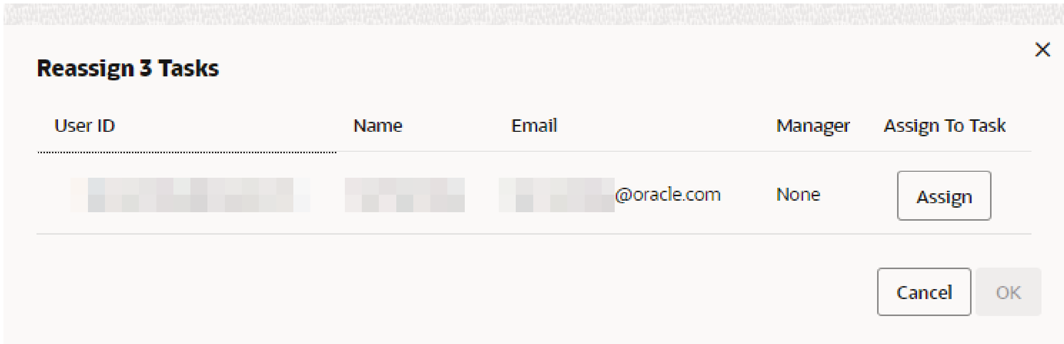
1. Click **Menu**.
2. Click the **Admin Task**.
3. Click the **Task Management** task. The Task Management window displays.

Figure 14-99 Task Management Window



4. Highlight a task you wish to reassign. To re-assign more than one task select the check box for each task.
5. Click the **Actions** menu and choose **Reassign**, or select the **Person** icon from the menu row tool bar. This opens the Reassign Task dialog window.

Figure 14-100 Reassign Task Window



6. Expand the list of users and from the list of available users, and click **Assign** to reassign the task.
7. Click **OK** to assign the task. A Warning window displays notifying that a different user is assigned the task.
8. Click **OK** to accept ownership of the task. The task is reassigned to another user.

Web Service Tracking

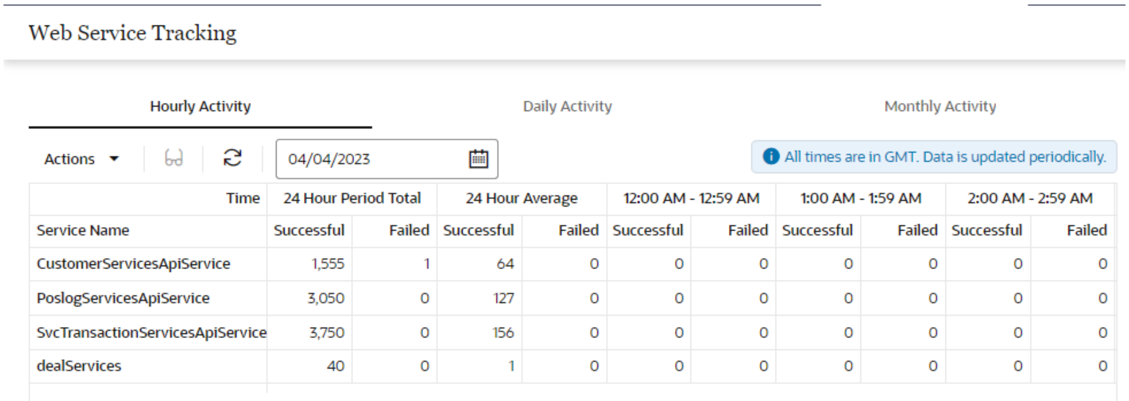
You have the ability to view web service call activity statistics hourly, daily and monthly, so that you can monitor successful and failed messages. Additional operation details for the service will also be available to allow the Associate to troubleshoot problems.

1. Click the **Tasks** icon.
2. Click **Admin**.
3. Click **Web Services Tracking**.

Activity Views

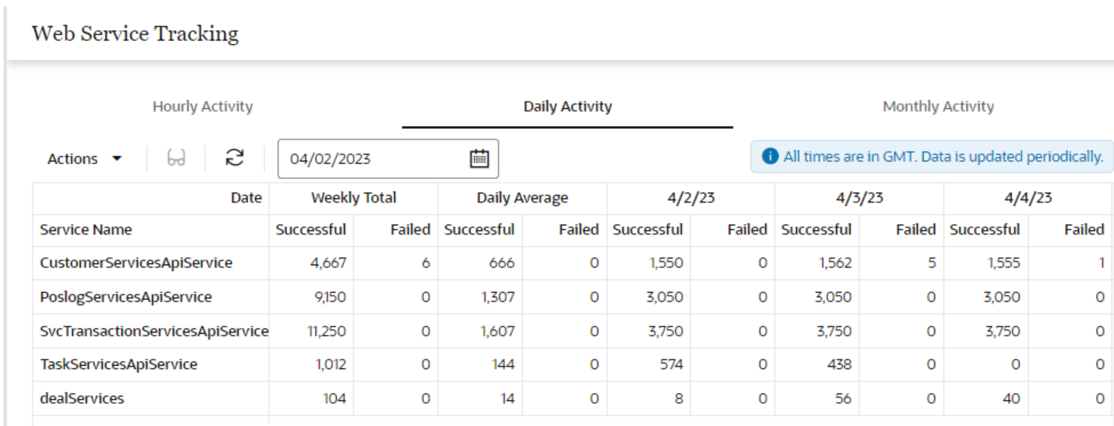
You can view the activities by Hourly, Daily, or Monthly. Select the header for each view to view by that time period.

Figure 14-101 Hourly Activity



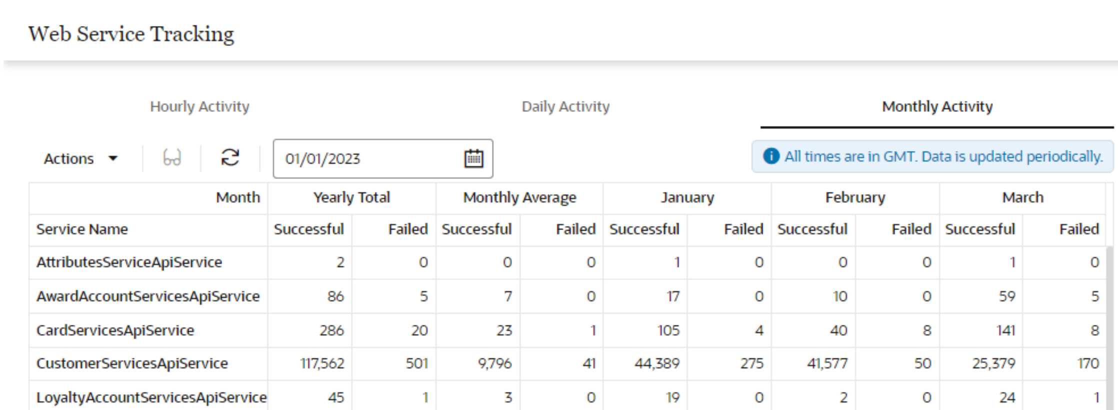
Time	24 Hour Period Total		24 Hour Average		12:00 AM - 12:59 AM		1:00 AM - 1:59 AM		2:00 AM - 2:59 AM	
Service Name	Successful	Failed	Successful	Failed	Successful	Failed	Successful	Failed	Successful	Failed
CustomerServicesApiService	1,555	1	64	0	0	0	0	0	0	0
PoslogServicesApiService	3,050	0	127	0	0	0	0	0	0	0
SvcTransactionServicesApiService	3,750	0	156	0	0	0	0	0	0	0
dealServices	40	0	1	0	0	0	0	0	0	0

Figure 14-102 Daily Activity



Date	Weekly Total		Daily Average		4/2/23		4/3/23		4/4/23	
Service Name	Successful	Failed	Successful	Failed	Successful	Failed	Successful	Failed	Successful	Failed
CustomerServicesApiService	4,667	6	666	0	1,550	0	1,562	5	1,555	1
PoslogServicesApiService	9,150	0	1,307	0	3,050	0	3,050	0	3,050	0
SvcTransactionServicesApiService	11,250	0	1,607	0	3,750	0	3,750	0	3,750	0
TaskServicesApiService	1,012	0	144	0	574	0	438	0	0	0
dealServices	104	0	14	0	8	0	56	0	40	0

Figure 14-103 Monthly Activity



Month	Yearly Total		Monthly Average		January		February		March	
Service Name	Successful	Failed	Successful	Failed	Successful	Failed	Successful	Failed	Successful	Failed
AttributesServiceApiService	2	0	0	0	1	0	0	0	1	0
AwardAccountServicesApiService	86	5	7	0	17	0	10	0	59	5
CardServicesApiService	286	20	23	1	105	4	40	8	141	8
CustomerServicesApiService	117,562	501	9,796	41	44,389	275	41,577	50	25,379	170
LoyaltyAccountServicesApiService	45	1	3	0	19	0	2	0	24	1

Viewing Operation Details

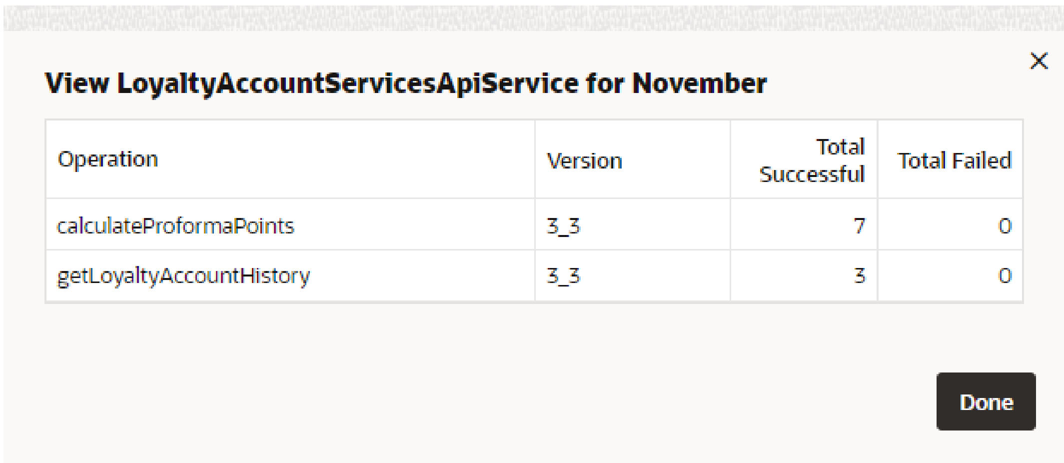
You have the ability to view operation details for a service to allow you to troubleshoot problems. To view operational details:

1. Use the **Date Picker** to enter a date.
2. Select a **specific time period** with a value **greater than zero** within one of the Activity Views.

> **Note:**
>
> The View Action Menu item is only available for specific time periods. The Total and Average section details of each view are unable to be viewed at that level.

3. Click the **Actions** menu **View** option, or the **Eyeglasses icon**. The service details displays.

Figure 14-104 Service Details



4. After viewing the details click **Done** to close the window.
5. You can refresh the list by clicking the **Refresh** icon or picking the **Refresh** option from the **Actions menu**.

Users

You have the ability to view, search and edit a list of users, so that you can update user details.

> **Note:**
>
> When a new user is created, the default organization 1000 will be assigned by default.

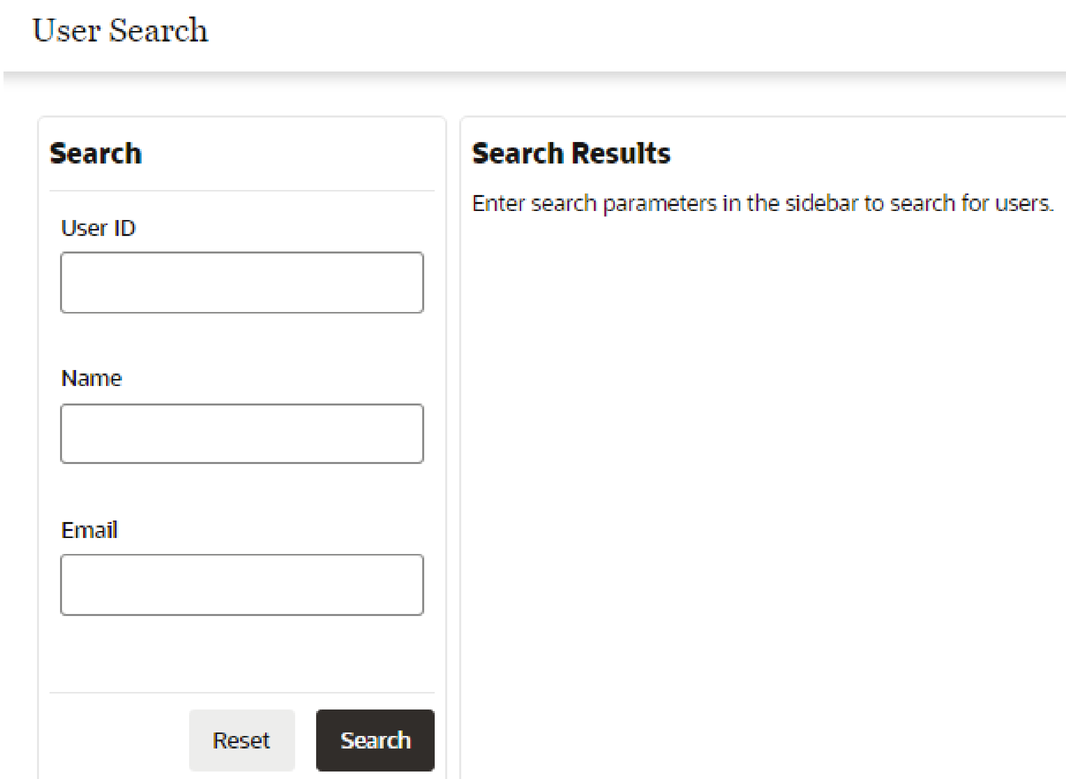
Searching for Users

To search for a user do the following:

1. Click Tasks.
2. Click Admin

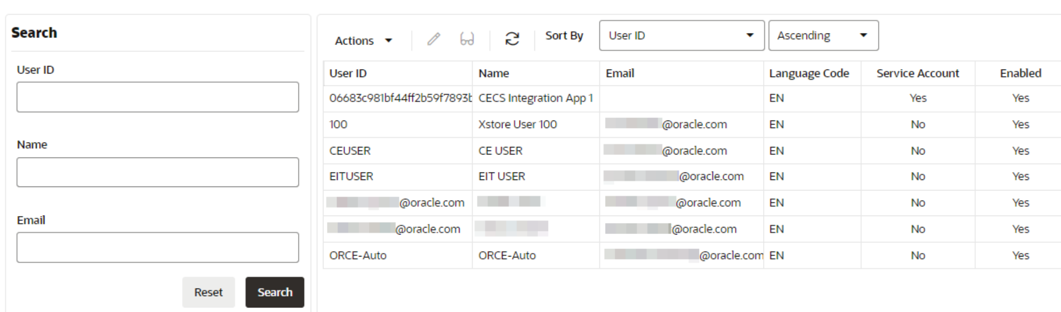
3. Click Users. The User Search window displays.

Figure 14-105 User Search



4. Enter the **USER ID**, **Name**, or **Email** of the user.
5. Click **Search**. The list of users matching the search criteria displays.

Figure 14-106 Search Results

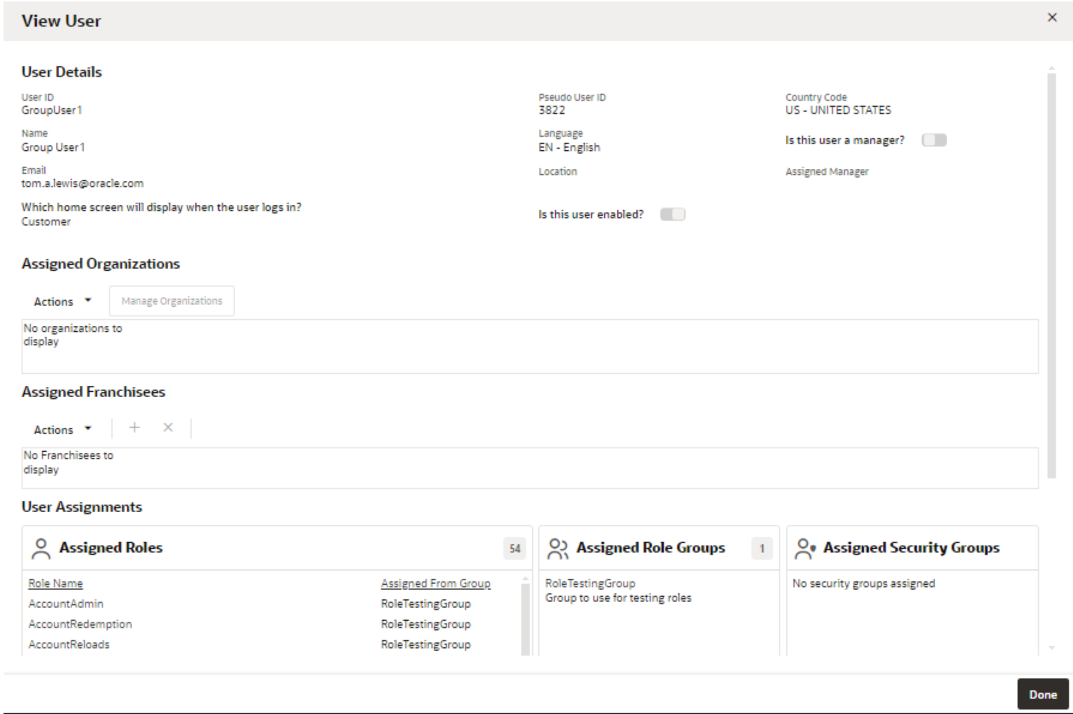


Viewing a User

To view a User, do the following:

1. Highlight the **row** of the User you want to view.
2. Click the **Actions** menu and click, **View** or click the **View icon** to open the View User window.

Figure 14-107 View User



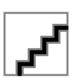
3. View the details of the User and click **Done** to close the window.

Editing Users

To edit a User do the following:

1. Highlight the **row** of the User.
2. Click the **Actions** menu and select **Edit**, or click the **Edit (Pencil)** icon. The Edit User window displays.

Figure 14-108 Edit User

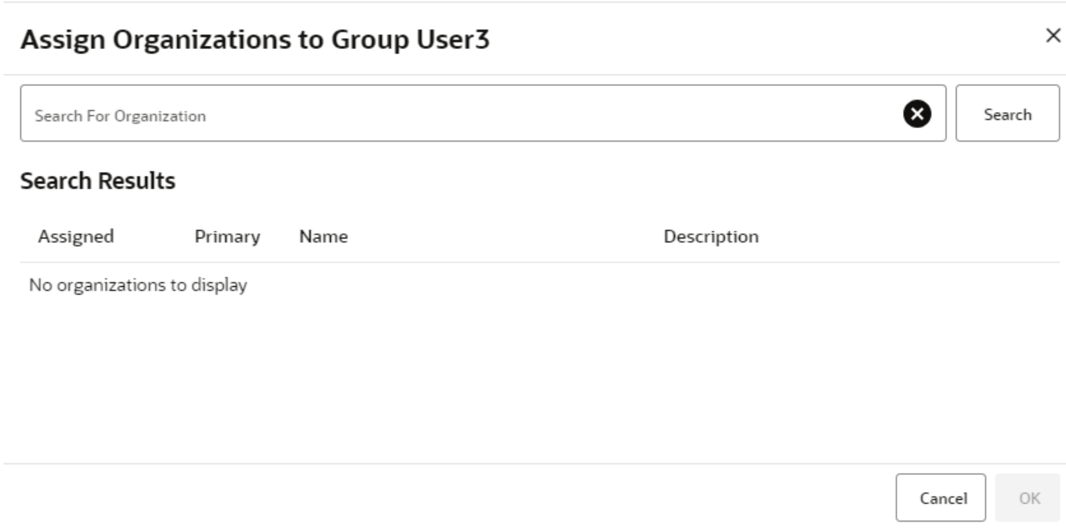


3. The User Details editable regions for each user will vary based on privileges. Typically you can edit the **Language**, **Country Code**, **Assigned Manager**, and **Default Home Page**.

   Assign an Organization

4. Click the **Actions** menu and then click **Manage Organizations**, or click the **Manage Organizations** button. The Assign Organization drawer appears.

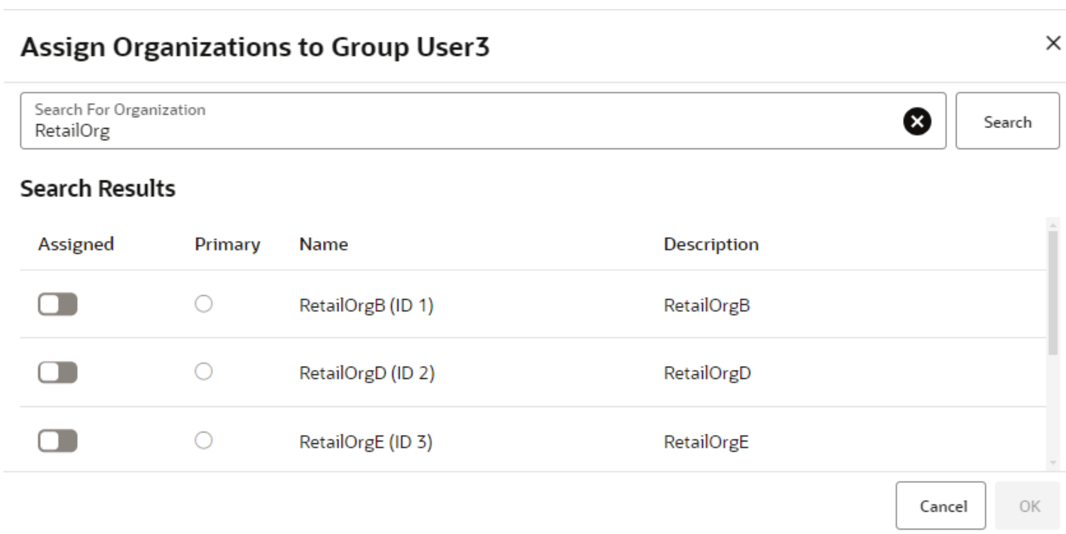
Figure 14-109   Assign Organization



In the Search for Organization field, enter all or part of the **Organization ID**, **Name**, or **Description** of the Organization you want to search for.

5. Click **Search**. A list of Organizations matching the search text is displayed in the Search Results grid.

Figure 14-110   Search Results: Assign Organizations

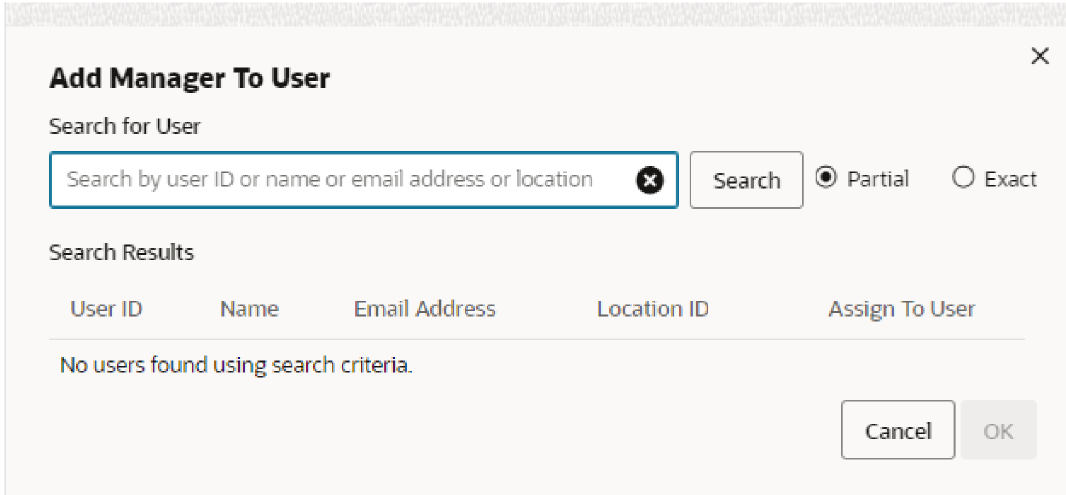


6. For each Organization you wish to assign to the user, toggle the **Assigned** switch to **ON**.
7. Click the **Primary** radio button to make an Organization the default when logging into the system.
8. For each Organization you wish to unassign, toggle the **Assigned** switch to **OFF**.
9. Click **OK** to accept the changes, or **Cancel** to close the window without saving.

Assign a Manager

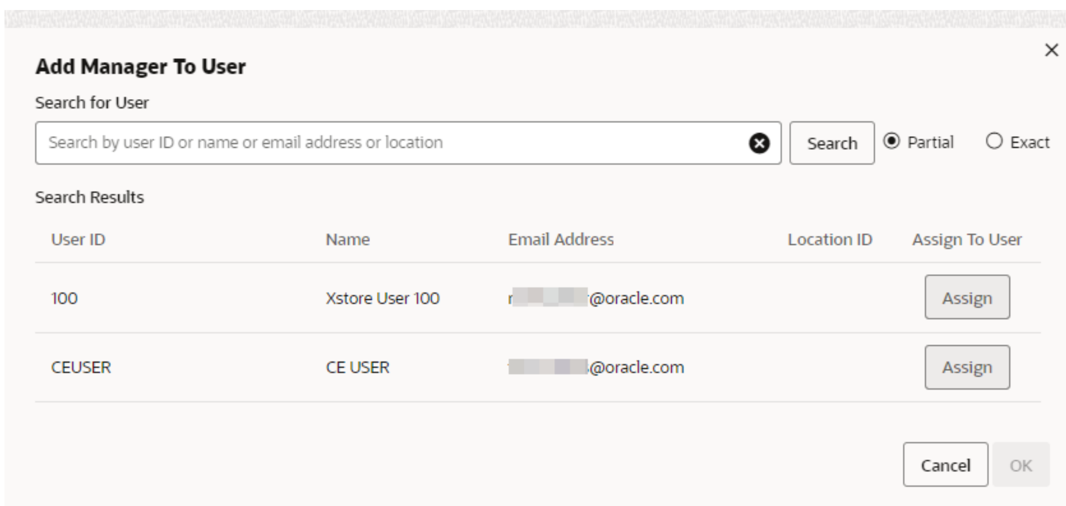
10. Click the **Assigned Manager Pencil** icon. The Add Manager to User window displays.

Figure 14-111 Add Manager To User



11. In the Search for User field, enter the **User ID**, **Name**, or **Email Address** of the user you want to search for.
12. Select **Partial**, if you want to results that match part of what you enter, or select **Exact** if you only want results that are an exact match.
13. Click **Search**. A list of users matching the search text is displayed in the Search Results grid.

Figure 14-112 Search Results Grid



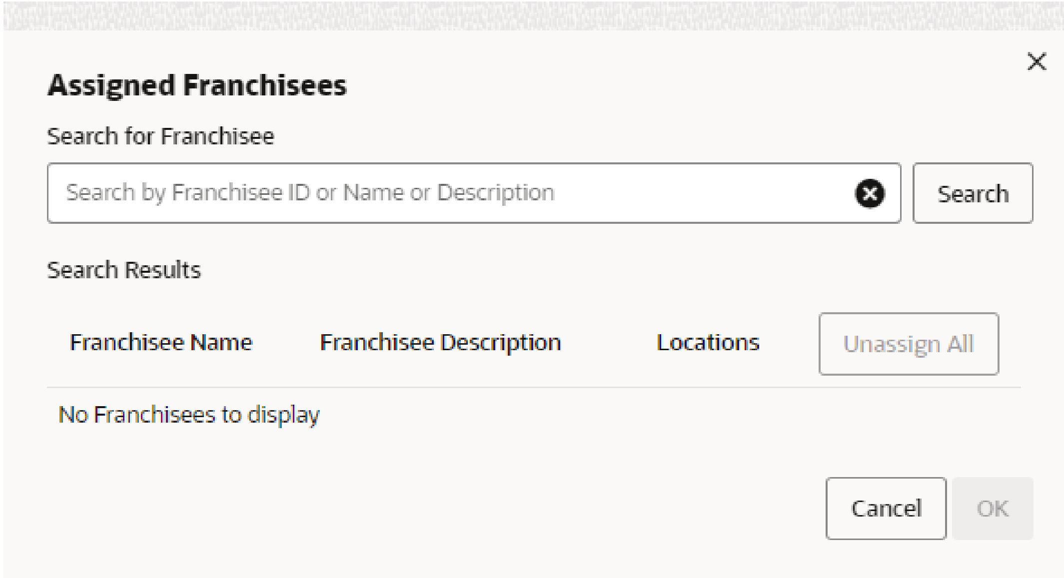
14. For each user you wish to assign, click **Assign**.
15. For each user you wish to unassign, click **Unassign**.
16. Click **OK** to accept the changes, or **Cancel** to close the window without saving.

Assigned Franchisees

17. You can assign Franchisees to the User.

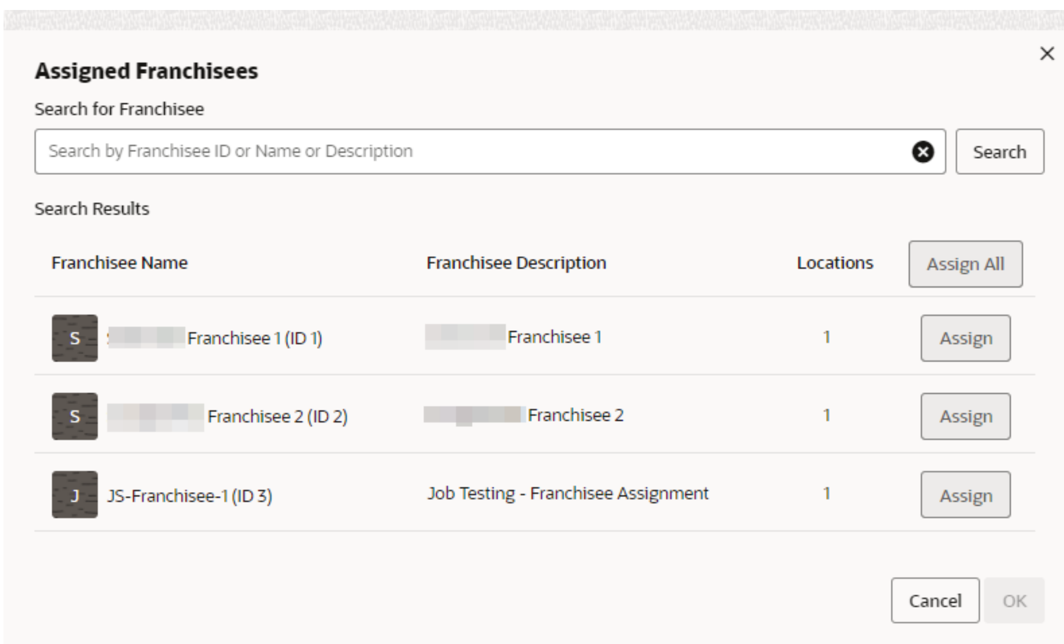
Click the **Add (+) icon**, or choose **Add** from the **Actions** menu. The Assigned Franchisees window displays.

Figure 14-113 Assigned Franchisees



18. Enter any or part of a **Franchisee ID**, **Name**, or **Description**.
19. Click **Search**. The Search Results list appears.

Figure 14-114 Search Results



20. For each Franchisee you wish to assign, click **Assign**.
21. For each user you wish to unassign, click **Unassign**.
22. Click **Assign All** to assign all of the Franchisees that appear in the search results.
23. Click **OK** to accept the changes, or **Cancel** to close the window without saving.
24. To delete a previously assigned Franchisee, highlight the row of the **Franchisee** and click the **X icon**, or click the **Action** menu and click **Delete**.

25. After all edits are finished click **OK** save the changes, or click **Cancel** to close the window without saving.

15 Segment Queries

When creating an Unstratified or a Stratified Segment, it is important to know what you need to enter/select in each field, whether there is a particular format for the data entered, and what the query is going to return. If you are not sure what Customer Engagement is doing, you may get an error on the query or the results may not be what you expect.

This appendix explains what is required for each query template.

The following conventions apply to data entry when creating a segment:

- Dates must be in the MM/DD/YYYY format.
- When entering numbers, do not use commas, dollar signs, or decimal places unless specifically instructed to do so.
- When entering text, do not use any punctuation unless instructed otherwise.

Overview

This chapter addresses the following;

- Overview
- Segment Query Categories
- Segment Queries
- Strata Queries

Segment Query Categories

The following is a list of the Segment Query categories:

- Customer Demographics
- Customer Contact
- Customer Attributes
- Purchase Activity
- Basic Programs
- Segment Elements
- Promotion Activity
- Strategic Segments
- Loyalty Segments

These categories are available at the Segment Query step of the Create Segment wizard, and control the customers selected for the Stratified or Unstratified Segment.

The following is a list of the Stratified Query categories:

- Loyalty Summary

- Transaction Criteria
- Line Item Detail

These categories control how the customers are broken out into strata for a Stratified Segment, and are available at the Strata Query step of the Create Segment Wizard if a Strata Type of Loyalty or Transaction was selected at the Strata Field step.

The Strata Query step is not available when a Strata Type of Customer was selected at the Strata Field step. Also, this step is not available for an Unstratified Segment.

Segment Queries

The following categories are available at the Segment Query step of the Create Segment wizard, and control the customers to select for the Stratified or Unstratified Segment.

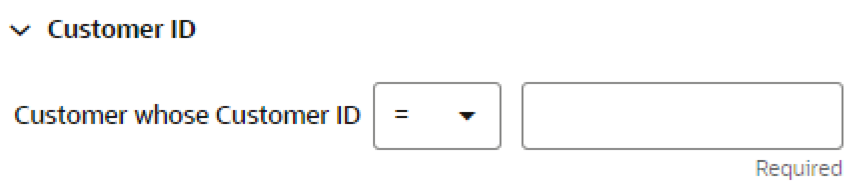
Customer Demographics

This category is available at the Segment Query step of the Create Segment wizard, and controls the customers to select for the Stratified or Unstratified Segment

Customer ID

This query returns active and valid Customers whose Customer ID matches your input.

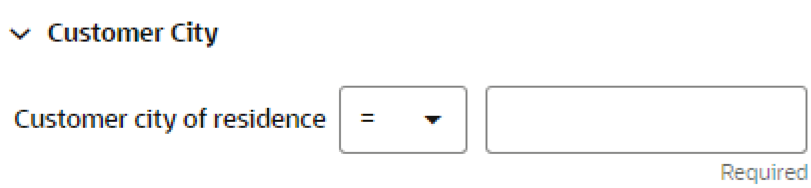
Figure 15-1 Customer ID



Customer City

This query returns active and valid Customers whose primary and active address is in the city you have specified.

Figure 15-2 Customer City



Customer State

This query returns active and valid Customers whose primary and active address is in the state you have specified.

Figure 15-3 Customer State

Postal Code

This query returns active and valid Customers whose primary and active address is in the postal code (zip code) you have specified. Use only five digits for US zip codes.

Figure 15-4 Postal Code

Postal Code Vicinity

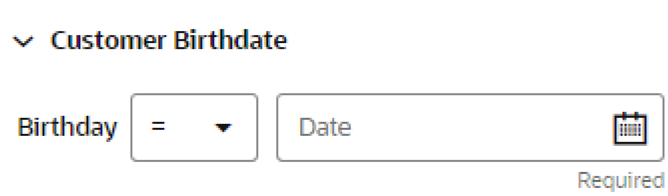
This query returns active and valid Customers whose addresses are within a radius of a specified number of miles of a specified location.

Figure 15-5 Postal Code Vicinity

Customer Birthdate

This query returns Customers whose birthday matches the parameters you input. The date you input must be a valid date ([default] = current date).

Figure 15-6 Customer Birthdate



Customer Birth Month

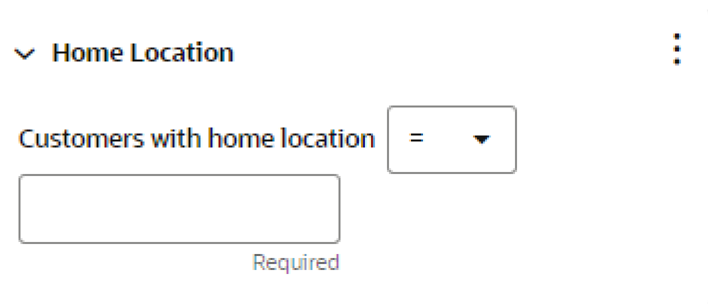
This query returns active and valid Customers whose birth month matches your selection ([default] = ,ÄúJanuary,Äù).

Figure 15-7   Customer Birth Month

Home Location

This query returns active and valid Customers whose Home Location matches your entry. The Home Location you enter must be a valid location for your organization.

Figure 15-8   Home Location



Signup Location

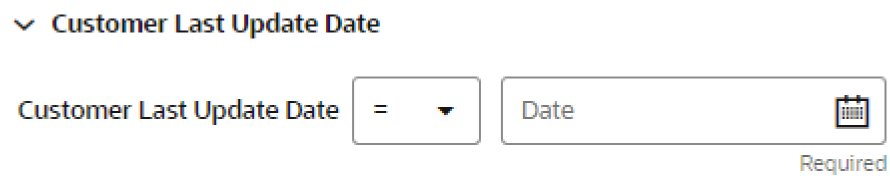
This query returns all Customers whose signup location matches the one you specify. The location you enter must be a valid location for your organization.

Figure 15-9   Signup Location

Customer Last Update Date

This query returns active and valid Customers whose last update date matches what you have entered. The date must be a valid date.

Figure 15-10 Customer Last Update Date



Signup Date

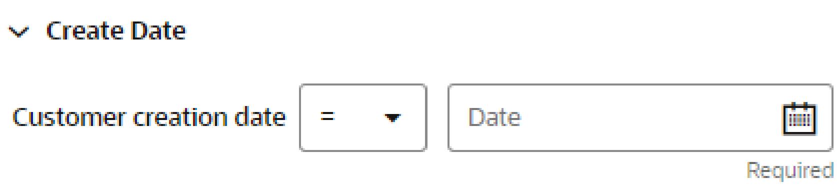
This query returns active and valid Customers whose signup date matches what you have entered. The date must be a valid date.

Figure 15-11 Signup Date

Create Date

This query returns active and valid Customers whose create date matches what you have entered. The date must be a valid date.

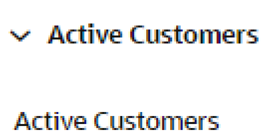
Figure 15-12 Create Date



Active Customers

This query returns all active and valid Customers. This query has no parameters to configure

Figure 15-13 Active Customers



Customer Contact

This section

Mail Contact Permission

This query returns all Customers who have given permission to be contacted by mail.

Figure 15-14 Mail Contact Permission

Address Type Code

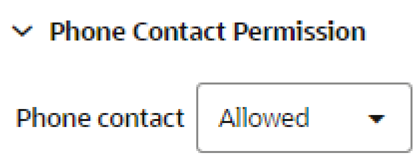
This query returns all Customers whose address type matches what you entered.

Figure 15-15 Address Type Code

Phone Contact Permission

This query returns all Customers who have given permission to be contacted by telephone.

Figure 15-16 Phone Contact Permission



Phone Type

This query returns all Customers whose phone type matches your selection.

Figure 15-17 Phone Type

Email Contact Permission

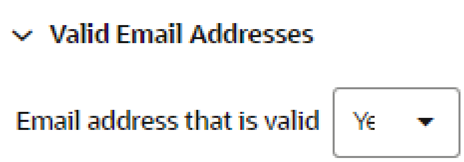
This query returns all Customers who have given permission to be contacted by email.

Figure 15-18 Email Contact Permission

Valid Email Addresses

This query returns all Customers whose email address has been validated or not validated.

Figure 15-19 Valid Email Addresses



Email Address Type

This query returns all Customers whose email type matches your selection.

Figure 15-20 Email Address Type

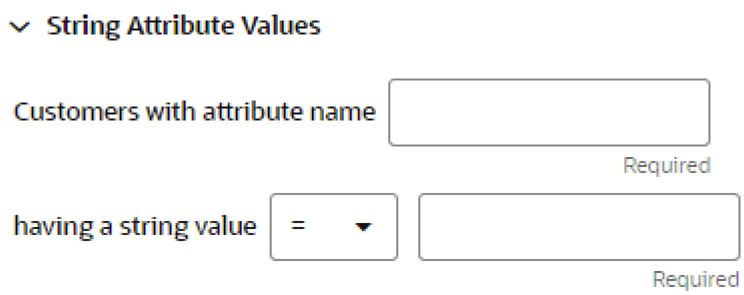
Customer Attributes

This category is available at the Segment Query step of the Create Segment wizard, and controls the customers to select for the Stratified or Unstratified Segment.

String Attribute Values

This query returns all Customers with a string attribute whose value matches your entry.

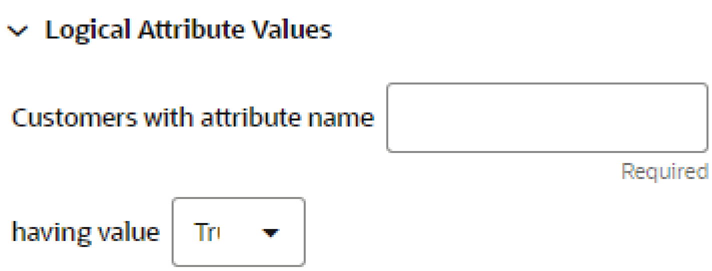
Figure 15-21 String Attribute Values



Logical Attribute Values

This query returns all Customers with a logical attribute that has been assigned the selected value.

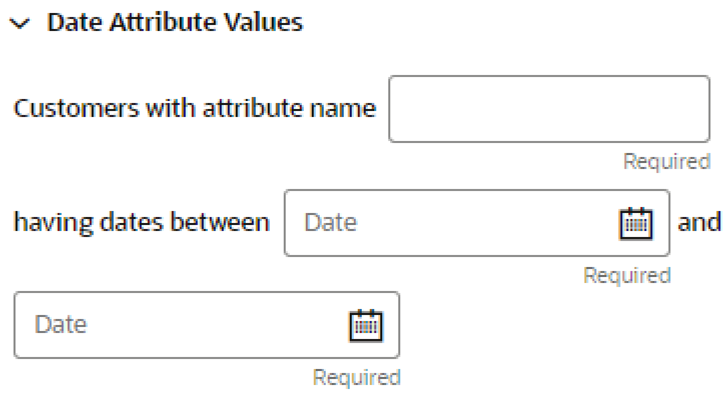
Figure 15-22 Logical Attribute Values



Date Attribute Values

This query returns all Customers with a date attribute that has been assigned a date between the entered values.

Figure 15-23   Date Attribute Values



Purchase Activity

This category is available at the Segment Query step of the Create Segment wizard, and controls the customers to select for the Stratified or Unstratified Segment.

Lifetime Sales

This query returns all Customers whose lifetime sales amount matches what you have entered.

Figure 15-24   Lifetime Sales

Lifetime Returns

This query returns all Customers whose lifetime returns amount matches what you have entered.

Figure 15-25   Lifetime Returns

Year-To-Date Sales

This query returns all Customers whose year-to-date sales amount matches what you have entered.

Figure 15-26 Year-to-Date Sales

Year-To-Date Returns

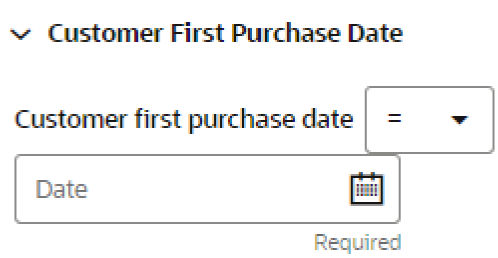
This query returns all Customers whose year-to-date returns amount matches what you have entered.

Figure 15-27 Year-to-Date Returns

Customer First Purchase Date

This query returns active and valid Customers whose first use date matches the date criteria entered. The date must be a valid date.

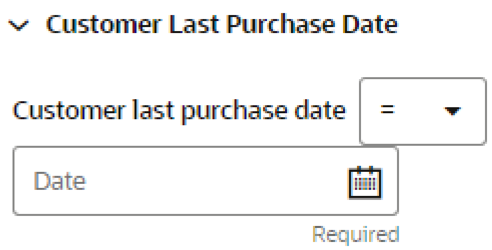
Figure 15-28 Customer first Purchase Date



Customer Last Purchase Date

This query returns active and valid Customers whose last use date matches the date criteria entered. The date must be a valid date.

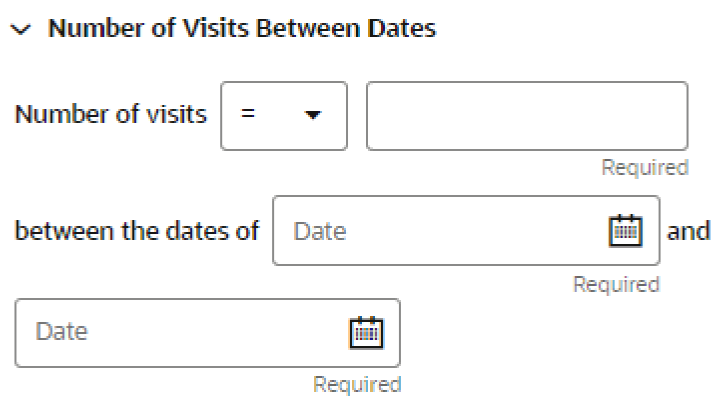
Figure 15-29 Customer Last Purchase Date



Number of Visits Between Dates

This query returns all active Customers who made x visits between the dates specified. Both dates must be filled in and valid.

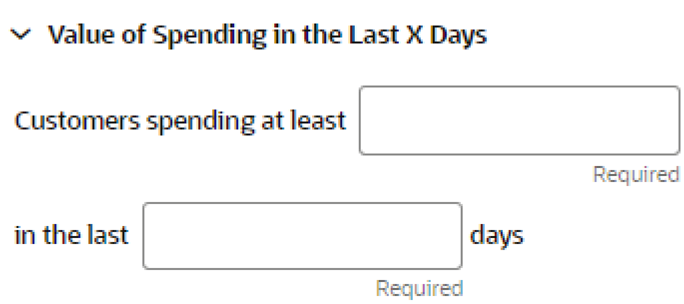
Figure 15-30 Number of Visits Between Dates



Value of Spending in the Last X Days

This query returns all the Customers who have spent a designated amount or more within the last X number of days.

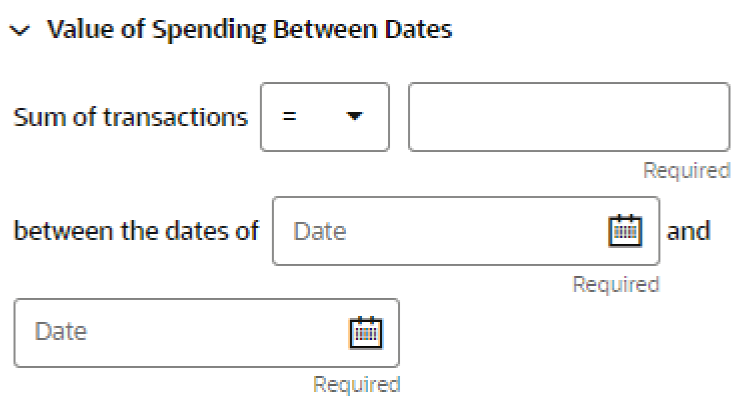
Figure 15-31 Value of Spending in last X Days



Value of Spending Between Dates

This query returns all the Customers who have spent a designated amount or more within a designated range of dates.

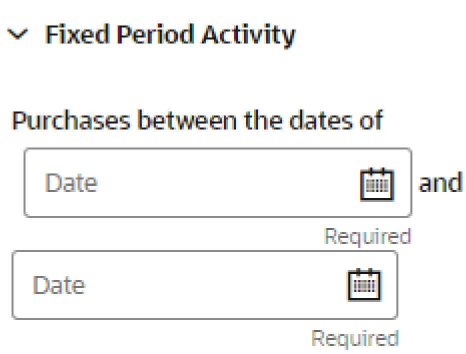
Figure 15-32 Value of Spending Between Dates



Fixed Period Activity

This query returns active and valid Customers who have completed transactions between the business dates you have specified. Both dates must be filled in and valid.

Figure 15-33 Fixed Period Activity



Purchase in the Last X Months

This query returns all Customers who have made a purchase within the number of months you specify.

Figure 15-34 Purchase in the Last X Months

Purchase Within X Days

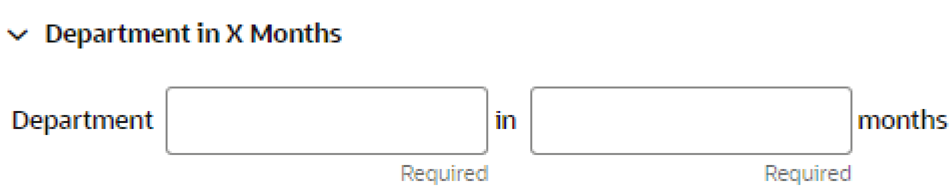
This query returns all Customers who have made a purchase within the number of days you specify.

Figure 15-35 Purchase Within X Days

Department in X Months

This query returns all Customers who have made a purchase from Department X within Y months.

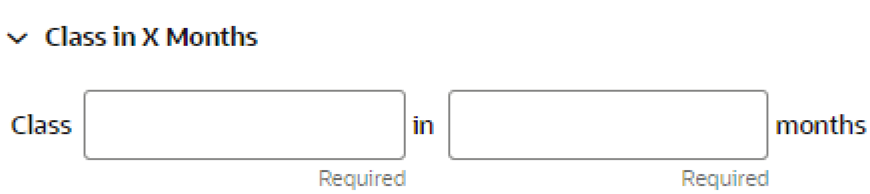
Figure 15-36 Department in X Months



Class in X Months

This query returns all Customers who have purchased an item in the class you specified in the last X months.

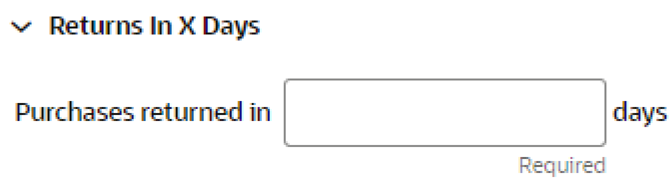
Figure 15-37 Class in X Months



Returns in X Days

This query returns active and valid Customers who have made one or more returns in the number of days you have specified.

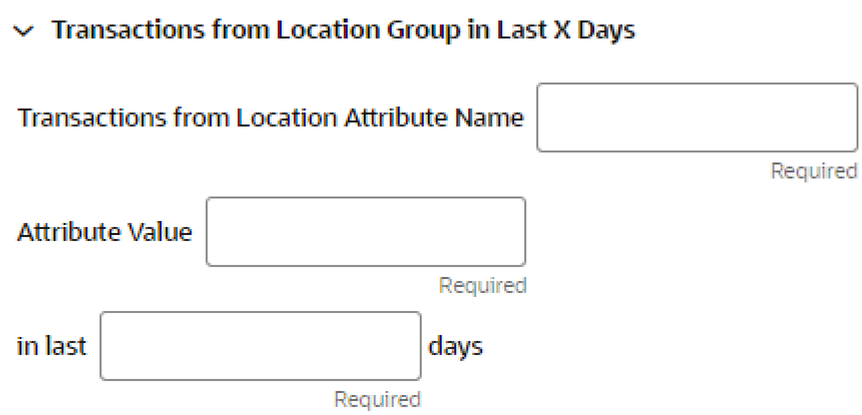
Figure 15-38   Returns in X Days



Transactions from Location Group in Last X Days

This query returns the list of Customers who have performed a transaction at a location within a configured location group in the last X days.

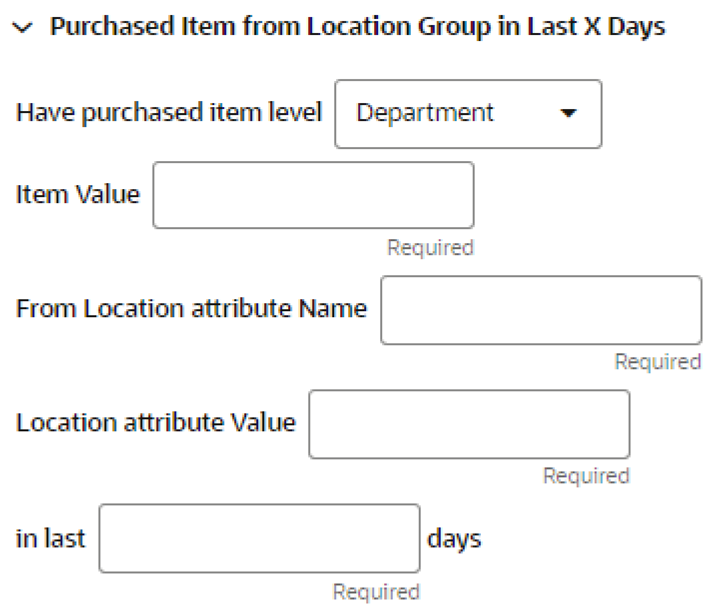
Figure 15-39   Transactions from Location Group in Last X Days



Purchased Item from Location Group in Last X Days

This query returns Customers who have purchased one or more items from a location within a location group in the last X days.

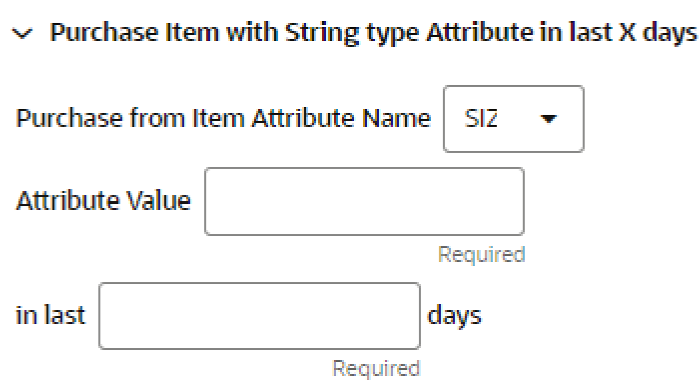
Figure 15-40   Purchase Item from Location Group in Last X Days



Purchased Item with String Type Attribute in Last X Days

This query returns Customers who have purchased, within the last X days, an Item assigned a certain string-type Item Attribute with an indicated value.

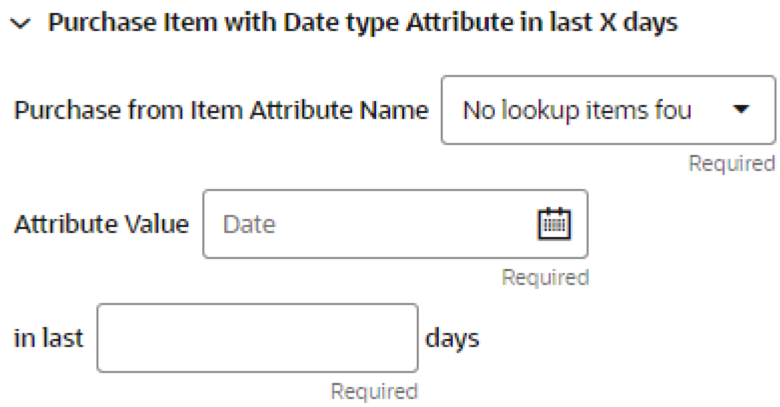
Figure 15-41   Purchase Item with String Type Attribute in Last X Days



Purchased Item with Date Type Attribute in Last X Days

This query returns Customers who have purchased, within the last X days, an Item assigned a certain date-type Item Attribute with an indicated value.

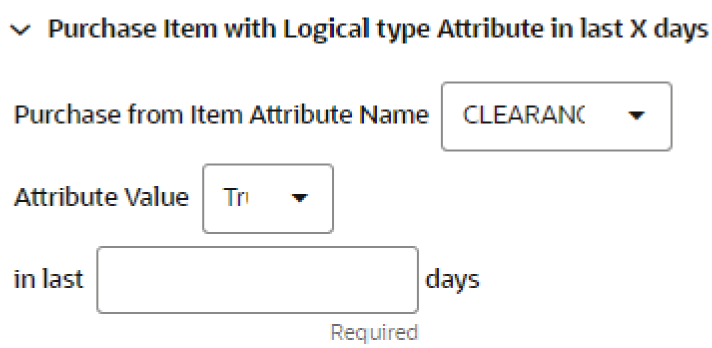
Figure 15-42 Purchased Item with Date Type Attribute in Last X Days



Purchased Item with Logical Type Attribute in Last X Days

This query returns Customers who have purchased, within the last X days, an Item assigned a certain logical-type Item Attribute with an indicated value.

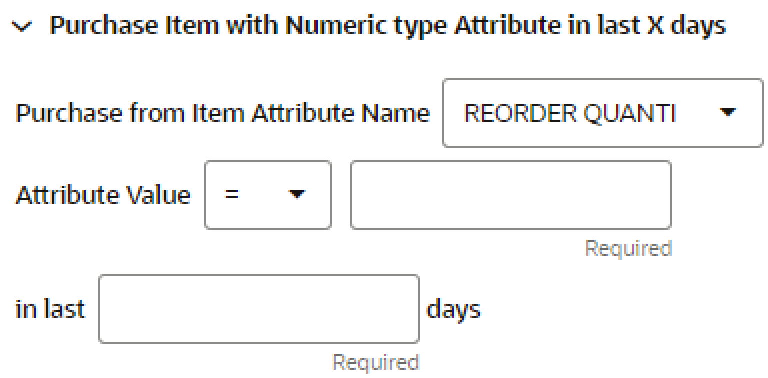
Figure 15-43 Purchased Item with Logical Type Attribute in Last X Days



Purchased Item with Numeric Type Attribute in Last X Days

This query returns Customers who have purchased, within the last X days, an Item assigned a certain numeric-type Item Attribute with an indicated value.

Figure 15-44 Purchased Item with Numeric Type Attribute in Last X Days



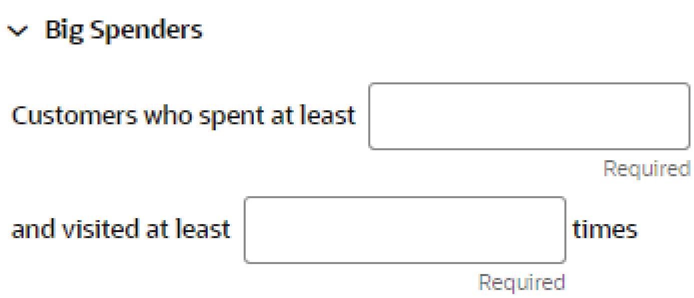
Basic Programs

This category is available at the Segment Query step of the Create Segment wizard, and controls the customers to select for the Stratified or Unstratified Segment.

Big Spenders

This query returns all active Customers who have spent at least X dollars in at least Y visits. The amount spent must be a number between 0 and 1,000,000. The number of visits must be a number between 0 and 999.

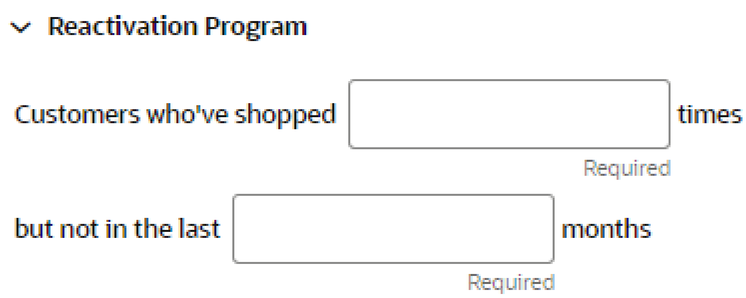
Figure 15-45 Big Spenders



Reactivation Program

This query returns active and valid Customers who have shopped X times but not in the last Y months. The number of times shopped must be a number between 0 and 1000 and the number of months must be a number between 0 and 120

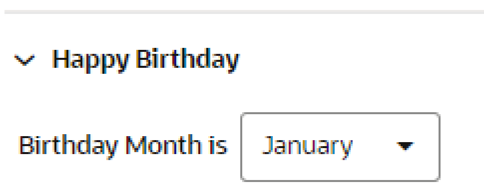
Figure 15-46 Reactivation Program



Happy Birthday

This query returns all active Customers who have a valid address, have given permission to be contacted by mail, and whose birthday is in the month you selected ([default] = January)

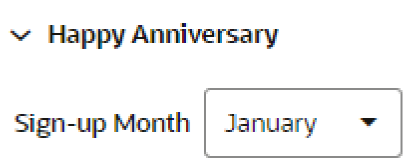
Figure 15-47 Happy Birthday



Happy Anniversary

This query returns all active Customers who have a valid address, have given permission to be contacted by mail, and whose signup date is in the month you selected ([default] = January.

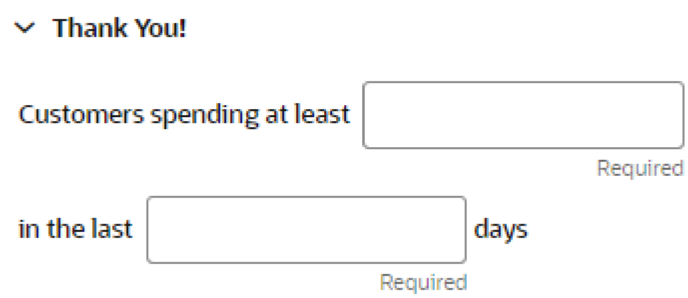
Figure 15-48 Happy Anniversary



Thank You!

This query returns active and valid Customers who have spent at least X dollars in the last Y days. The amount spent must be a number between 1 and 1,000,000 and the number of days must be a number between 1 and 1000 (i.e. 100 dollars in the last 30 days)

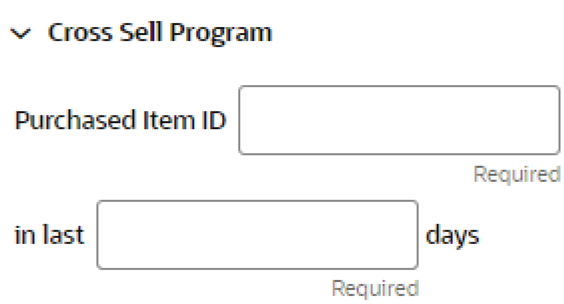
Figure 15-49 Thank You



Cross Sell Program

This query returns active and valid Customers who have purchased item X in the last Y days. The number of days must be a number between 1 and 1000

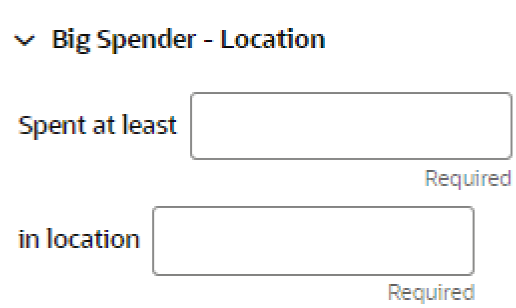
Figure 15-50 Cross Sell Program



Big Spender - Location

This query returns active Customers who have spent at least X dollars in location Y. The amount spent must be a number between 0 and 1,000,000. The location can be any valid location in your organization. You can only specify one (1) location

Figure 15-51 Big Spender Store



Anniversary Program

This query returns active Customers who have purchased item X between Y and Z days ago. The Purchased Item can be any valid item in your organization. The first number of days (Y) must be an integer between 0 and 1000 and the second number of days (Z) must be an integer between 1 and 1000.

Figure 15-52   Anniversary Program

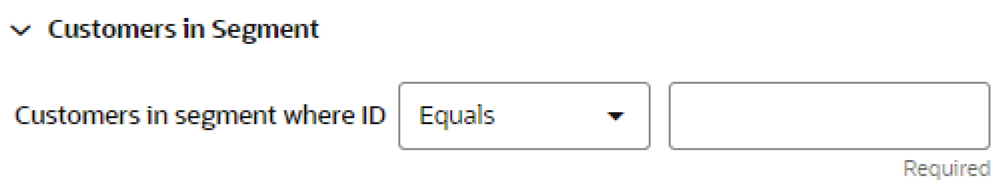
Segment Elements

This section

Customers in Segment

This query returns all Customer who are in the Segment ID specified.

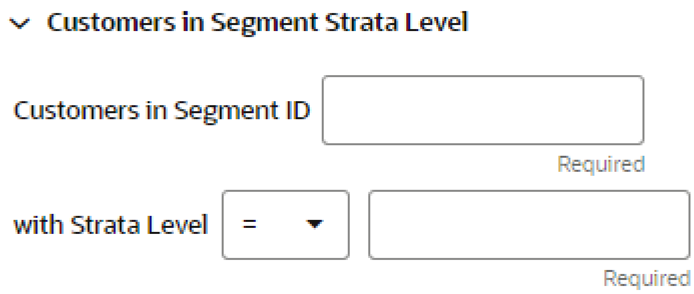
Figure 15-53   Customers in Segment



Customers in Segment Strata Level

This query returns all Customers in a specified strata level within a Segment.

Figure 15-54   Customers in Segment Strata Level



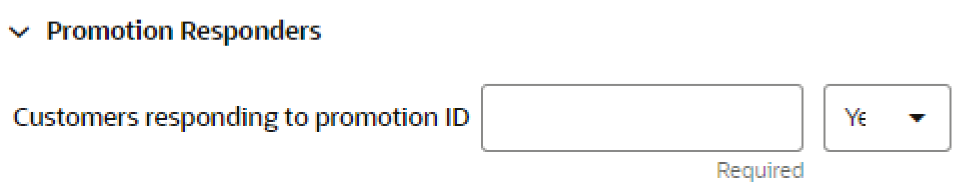
Promotion Activity

This category is available at the Segment Query step of the Create Segment wizard, and controls the customers to select for the Stratified or Unstratified Segment

Promotion Responders

This query returns all active Customers who have responded to the promotion specified (if Yes is selected in the dropdown selection) or not responded to the promotion (if No is selected). The promotion can be any valid promotion in your organization

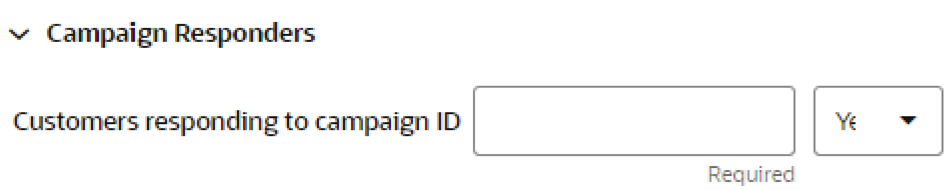
Figure 15-55   Promotion Responders



Campaign Responders

This query returns all active Customers who have responded to the campaign specified (if Yes is selected in the dropdown selection) or not responded to the campaign (if No is selected). The campaign can be any valid campaign in your organization.

Figure 15-56   Campaign Responders



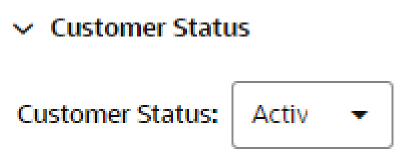
Strategic Segments

This category is available at the Segment Query step of the Create Segment wizard, and controls the customers to select for the Stratified or Unstratified Segment

Customer Status

This query returns valid Customers whose status matches the one you have selected. Your options are ‚ÄúActive‚Äù [default] and ‚ÄúInactive‚Äù.

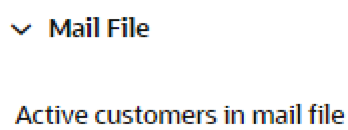
Figure 15-57 Customer Status



Mail File

This query returns all active Customers who have given permission to be contacted by mail and have a valid address.

Figure 15-58 Mail File



Mail File By Home Location

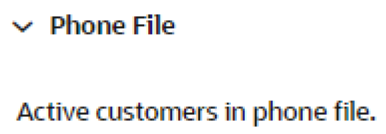
This query returns all active Customers whose home location is or is not the one you have specified, have given permission to be contacted by mail, and have a valid address.

Figure 15-59 Mail File by Home Location

Phone File

This query returns all active Customers who have given permission to be contacted by telephone and have a valid telephone number that is not their Fax number.

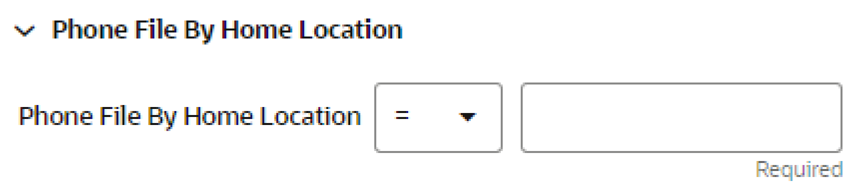
Figure 15-60 Phone File



Phone File By Home Location

This query returns all active Customers whose home location is or is not the one you have specified, have given permission to be contacted by phone, and have a valid telephone number that is not their Fax number.

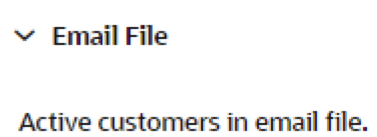
Figure 15-61 Phone File by Home Location



Email File

This query returns all active Customers who have given permission to be contacted by email and have a valid email address

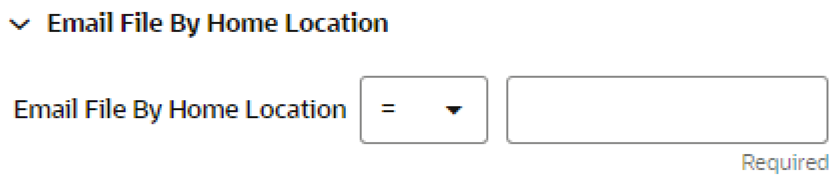
Figure 15-62 Email File



Email File By Home Location

This query returns all active Customers whose home location is or is not the one you have specified, have given permission to be contacted by email, and have a valid email address.

Figure 15-63 Email File by Home Location



Loyalty Segments

In the following queries, you can find the Program IDs by selecting Account -> Card Definition from the Application Menu. The resulting list page will list the Programs. Within the Card Definition, select the Card Prefix associated with the Program; Customer Engagement will then display the associated Programs and Program IDs.

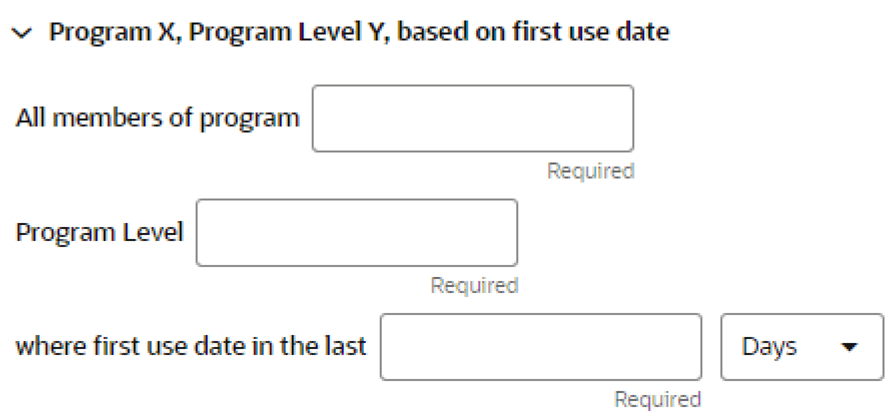
You can find the Level ID by selecting a Loyalty Program from the Program List page (see previous paragraph) and clicking Edit-Level. The resulting page will list the levels along with their Level IDs for the selected program.

This category is available at the Segment Query step of the Create Segment wizard, and controls the customers to select for the Stratified or Unstratified Segment

Program X, Program Level Y, based on First Use Date

This query returns all active Customers who participate in Program X at Level Y and who first used their Loyalty Account within the last Z Days [default], Weeks, or Months

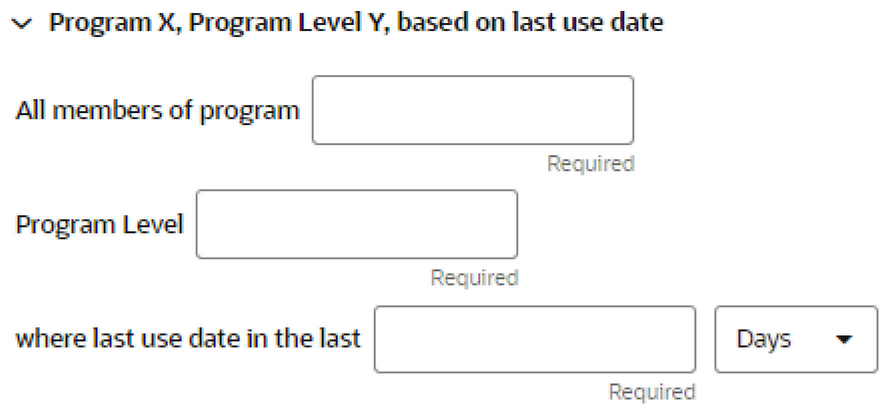
Figure 15-64 Program X, Program Y, Based on First Use Date



Program X, Program Level Y, based on Last Use Date

This query returns all active Customers who participate in Program X at Level Y and who last used their Loyalty Account within the last Z Days [default], Weeks, or Months

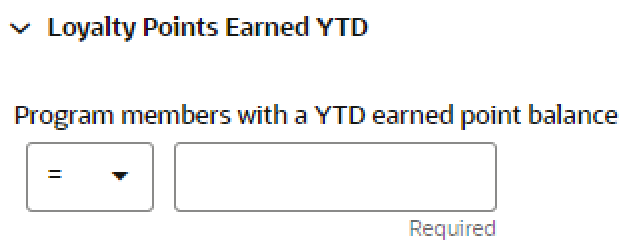
Figure 15-65   Program X, Program Y, Based on Last Date



Loyalty Points Earned YTD

This query returns all Customers whose year-to-date earned points balance matches the entered data.

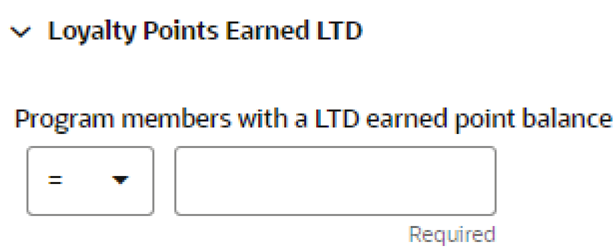
Figure 15-66   Loyalty Points Earned YTD



Loyalty Points Earned LTD

This query returns all Customers whose lifetime-to-date earned points balance matches the entered data.

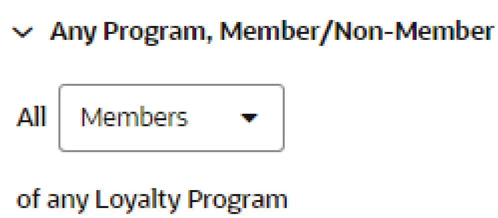
Figure 15-67   Loyalty Points Earned LTD



Any Program, Member/Non-Member

This query returns all Customers who have Cards/accounts that are or are not part of any Loyalty Program.

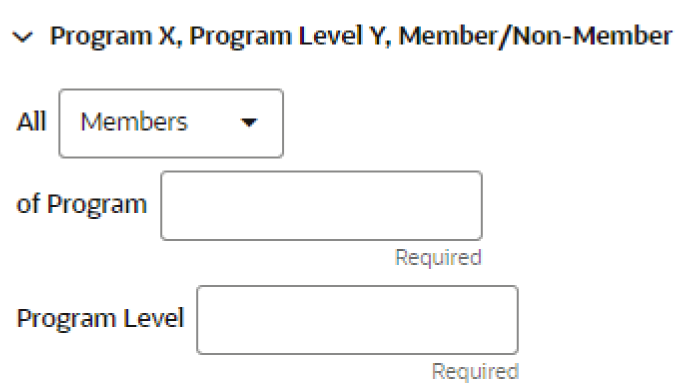
Figure 15-68   Any Program, Member/Non-Member



Program X, Program Level Y, Member/Non-Member

This query returns all Customers who have Cards/accounts that are part of Program X and Program Level Y. Program Level Y must be an integer between 0 and 99999.

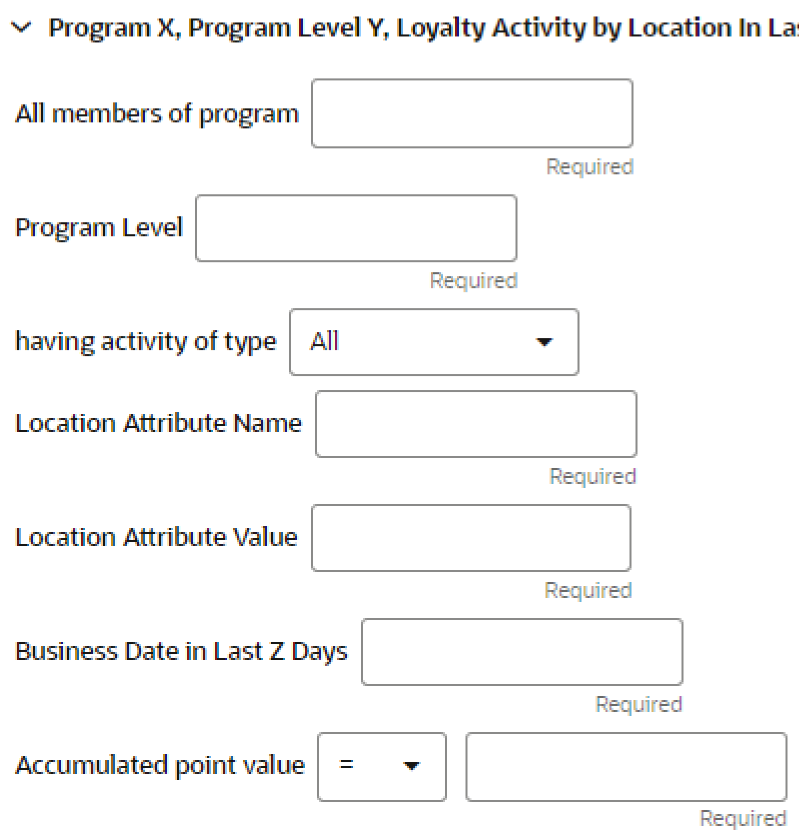
Figure 15-69   Program X, Program Level Y, Member/Non-Member



Program X, Program Level Y, Loyalty Activity by Location in Last Z Days

This query returns all active Customers who have Cards/accounts that are part of Program X and Program Level Y and who have a loyalty transaction of the type indicated from the location indicated (Location Attribute Name and Value) within the last number of days indicated and whose Loyalty Point total matches your selection.

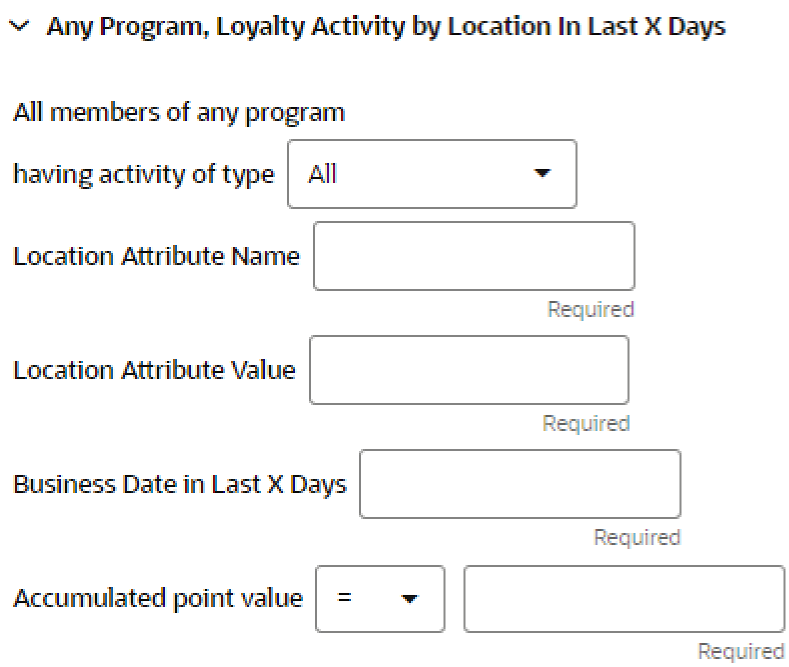
Figure 15-70 Program X, Program Level Y, Loyalty Activity by Location in Last Z Days



Any Program, Loyalty Activity by Location in Last X Days

This query returns all Customers who have Cards/accounts that are part of any Program and who have a loyalty transaction of the type indicated from the location indicated (Location Attribute Name and Value) within the last number of days indicated, and whose Loyalty Point total matches your selection.

Figure 15-71 Any Program, Loyalty Activity by Location in Last X Days



Strata Queries

These categories control how the customers are broken out into strata for a Stratified Segment, and are available at the Strata Query step of the Create Segment Wizard if a Strata Type of Loyalty or Transaction was selected at the Strata Field step.

The Strata Query step is not available when a Strata Type of Customer was selected at the Strata Field step. Also, this step is not available for an Unstratified Segment.

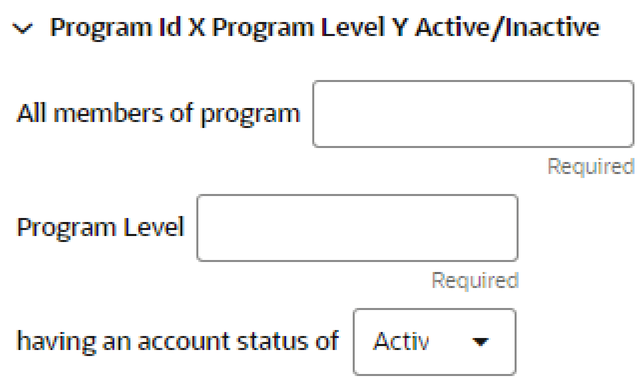
Loyalty Summary

These options are available at the Strata Query step if you select Strata Type = Loyalty at the Strata Field step.

Program Id X Program Level Y Active/Inactive

This query returns all the Customers who are members of a Program at a certain Program Level who are either Active or Inactive.

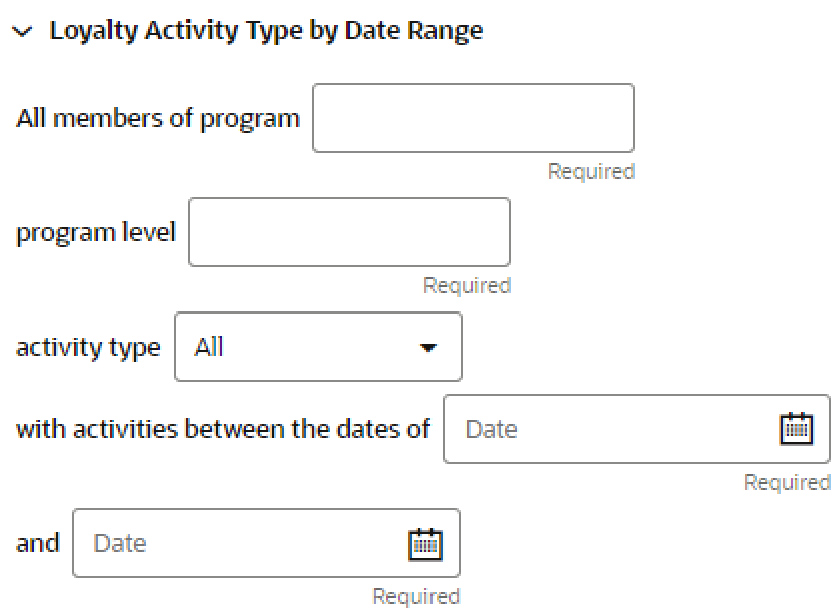
Figure 15-72 Program Id X Program Level Y Active/Inactive



Loyalty Activity Type by Date Range

This query returns all the Customers who are members of a Program at a certain Program Level who have performed a certain account activity within a specified date range.

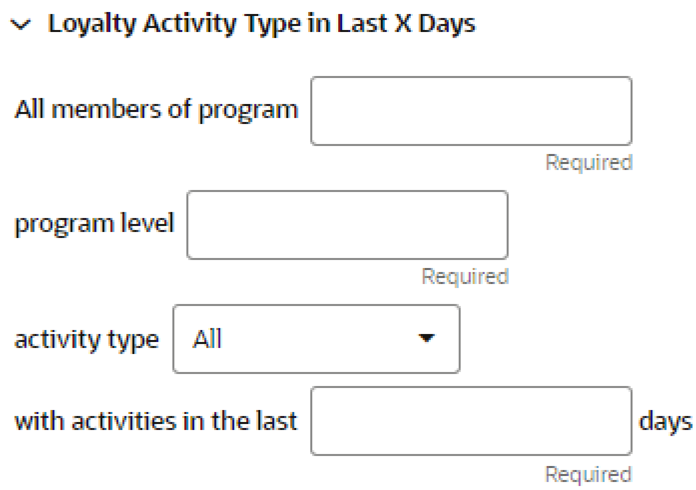
Figure 15-73 Loyalty Activity Type by Date Range



Loyalty Activity Type in Last X Days

This query returns all the Customers who are members of a Program at a certain Program Level who have performed a certain account activity within a certain number of days in the past.

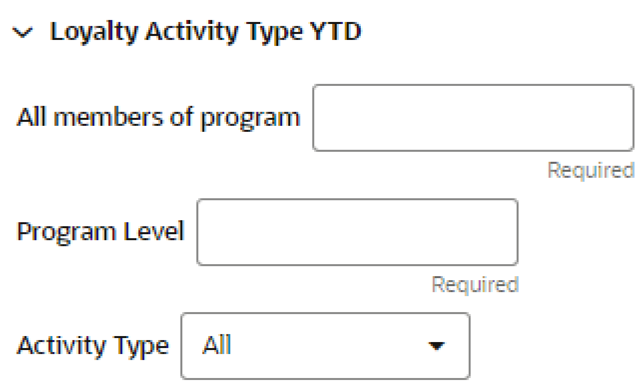
Figure 15-74   Loyalty Activity Type in Last X Days



Loyalty Activity Type YTD

This query returns all the Customers who are members of a Program at a certain Program Level who have performed a certain account activity within the year to date.

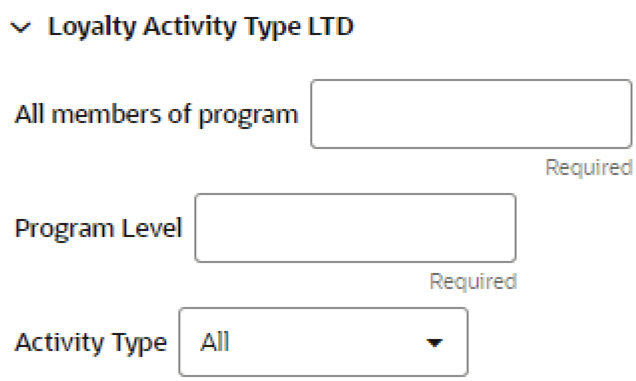
Figure 15-75   Loyalty Activity Type YTD



Loyalty Activity Type LTD

This query returns all the Customers who are members of a Program at a certain Program Level who have performed a certain account activity within the lifetime to date of the account.

Figure 15-76 Loyalty Activity Type LTD



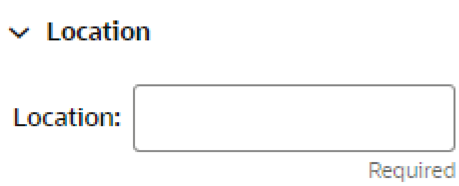
Transaction Criteria

These options are available at the Strata Query step if you select Strata Type = Transaction and Based on = Header at the Strata Field step

Location

This query returns the list of Customers who performed a transaction at a certain location.

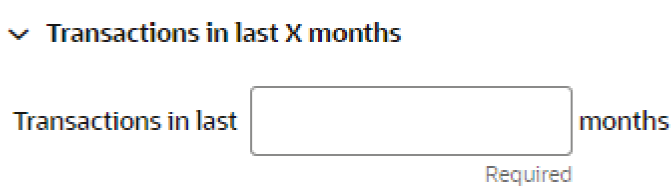
Figure 15-77 Location



Transactions in last X Months

This query returns the list of Customers who performed a transaction within a certain number of days in the past.

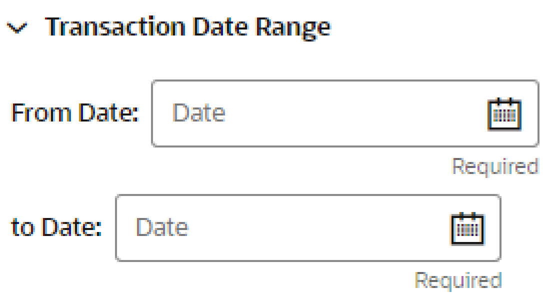
Figure 15-78 Transactions in last X Months



Transaction Date Range

This query returns the list of Customers who performed a transaction within a certain date range.

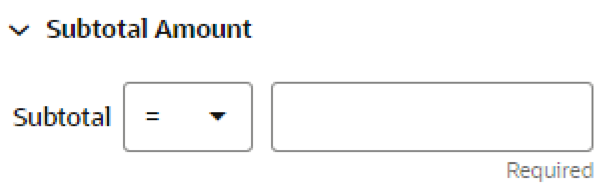
Figure 15-79 Transaction Date Range



Subtotal Amount

This query returns the list of Customers who have had a subtotal of a certain, defined value.

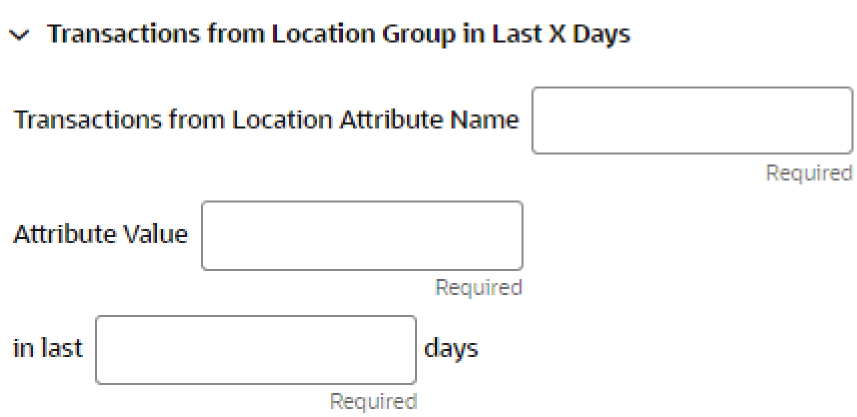
Figure 15-80 Subtotal Amount



Transaction from Location Group in Last X Days

This query returns the list of Customers who have performed a transaction at a location within a configured location group in the last X days.

Figure 15-81 Transaction from Location Group in Last X Days



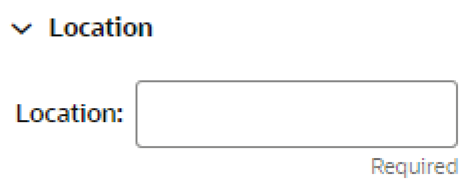
Line Item Detail

These options are available at the Strata Query step if you select Strata Type = Transaction and Based on = Detail at the Strata Field step.

Location

This query returns the list of Customers who performed a transaction at a certain location.

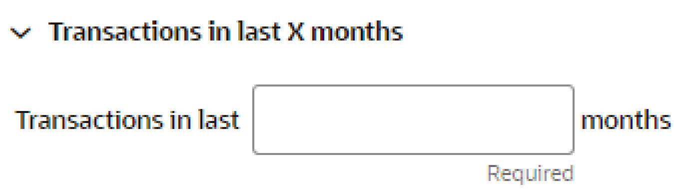
Figure 15-82 Location



Transactions in last X Months

This query returns the list of Customers who performed a transaction within a certain number of days in the past.

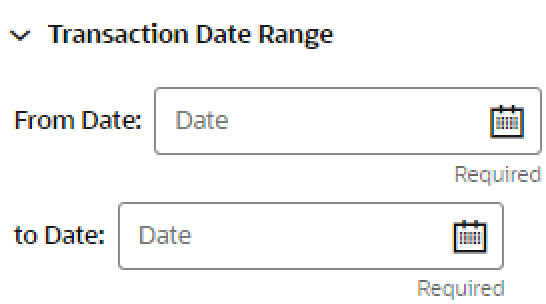
Figure 15-83 Transactions in Last X Months



Transaction Date Range

This query returns the list of Customers who performed a transaction within a certain date range.

Figure 15-84 Transaction Date Range



Item Department

This query returns the list of Customers who performed a transactions containing an item belonging to a certain item department.

Figure 15-85 Item Department

Item Class

This query returns the list of Customers who performed a transaction containing an item belonging to a certain item class.

Figure 15-86 Item Class

Item Style

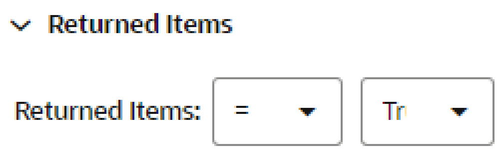
This query returns the list of Customers who performed a transaction containing an item belonging to a certain item style.

Figure 15-87 Item Style

Returned Item

This query returns the list of Customers who have either returned or not returned items in a transaction.

Figure 15-88 Returned Item



Item Price

This query returns the list of Customers with a transaction containing an item of a certain price.

Figure 15-89 Item Price

Item Quantity

This query returns the list of Customers with a transaction containing a certain quantity of any item.

Figure 15-90 Item Quantity

Item ID

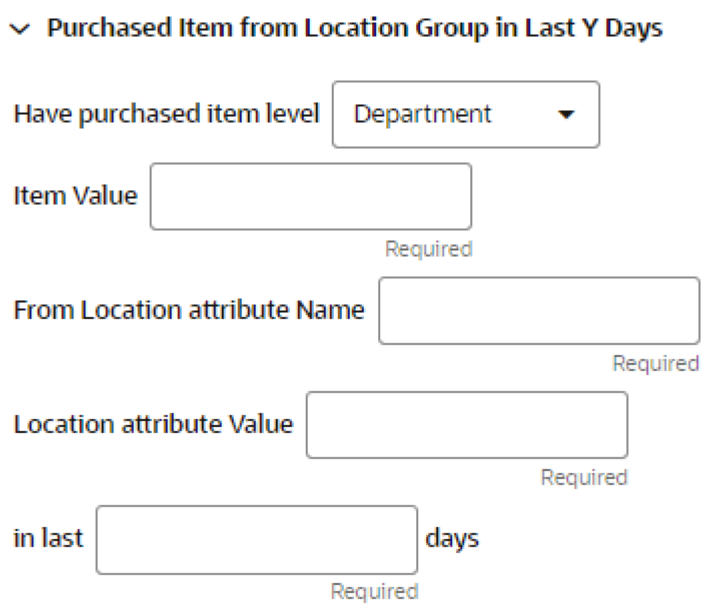
This query returns the list of Customers who performed a transaction containing a certain item.

Figure 15-91 Item ID

Purchased Item from Location Group in Last Y Days

This query returns the list of Customers who purchased an item within a certain set of items, from a certain set of locations, within a certain number of days in the past.

Figure 15-92 Purchased Item from Location Group in Last Y Days



A

Calculations

This appendix provides additional information on a few of the core retail calculations to help aid your understanding. It is important to understand that a particular measure can be calculated in many ways because it is impacted by many different input measures. When a value is changed that impacts the other editable values, the impacted measures that then need to be recalculated are protected so that you cannot also update the values. This prevents deadlock or circular calculation in which you do not know where to start recalculating.

Calculations on Scorecards

The following table lists the calculations used in Scorecards.

ORCE Feature	Location	Tile/Data Field	Calculation
Promotion Scorecard	revenue LY (tile)	promotion performance	SUM(CMP_PROMO_DEAL_RESULT.DIRECT_REVENUE)
	average transaction (tile)		
	average units (tile)		TABLE: CMP_PROMO_TRAN_RESULT
		direct revenue	SUM(TRAN_TOTAL - INDIRECT_REVENUE)
		indirect revenue	SUM(INDIRECT_REVENUE)
		total revenue	SUM(TRAN_TOTAL)
		Cost of goods sold	SUM(COST_OF_GOODS_TOTAL)
		markdowns	SUM(MARKDOWN_TOTAL)
		awards	Number of Award accounts (AWD_AWARD_ACCT.ACCOUNT_ID) multiplied by the award certificate amount (CMP_PROMO_AWARD_CERTIFICATE.AMOUNT)
		gross profit	SUM(TRAN_TOTAL) - SUM(COST_OF_GOODS_TOTAL)
		margin %	gross profit / SUM(TRAN_TOTAL) * 100)
		promotion cost	SUM(CMP_OFFER.FIXED_OFFER_COST) + SUM(COST_PER_THOUSAND) + (Sum of all associated CMP_PROMO_COST.AMOUNT)
		net profits	gross profit - promotion cost
		Promotion Cost per Customer per audience	promotion cost / total number of customers in target audience (CMP_CUST_PROMO_TARGET)

ORCE Feature	Location	Tile/Data Field	Calculation
		Promotion Cost per responded customer	promotion cost / total number of customers in target audience that have responded (CMP_CUST_PROMO_TARGET where CUST_RESPONDED_FLAG = 1) **Note**: If Target name is null or "Unidentified", the response will include a count of the distinct transactions from the CMP_PROMO_TRAN_RESULT table for the promotion.
		Revenue per customer in audience	direct revenue / total number of customers in target audience (CMP_CUST_PROMO_TARGET) (For Points promotions this will be always be 0)
		Revenue per Responded Customer	direct revenue / total number of customers in target audience that have responded (CMP_CUST_PROMO_TARGET where CUST_RESPONDED_FLAG = 1) **Note**: If Target name is null or "Unidentified", the response will include a count of the distinct transactions from the CMP_PROMO_TRAN_RESULT table for the promotion. (For Points promotions the INDIRECT_REVENUE is used in the calculation)
Promotion Scorecard continued	average units (tile) continued	Net Profit per customer in audience	net profits / total number of customers in target audience (CMP_CUST_PROMO_TARGET)
		Net Profit per responded customer	net profits / total number of customers in target audience that have responded (CMP_CUST_PROMO_TARGET where CUST_RESPONDED_FLAG = 1) **Note**: If Target name is null or "Unidentified", the response will include a count of the distinct transactions from the CMP_PROMO_TRAN_RESULT table for the promotion.
	average transaction (tile) coupon promotion	value of discount	SUM(CMP_PROMO_DEAL_RESULT.TOTAL_DISCOUNT) for the coupon code, Promotion and target
		average sales by coupon	SUM(CMP_PROMO_DEAL_RESULT.DIRECT_REVENUE) / Count of distinct RTL_TRAN_ID (Transaction Ids) in CMP_PROMO_DEAL_RESULT for the Coupon Code, Promotion and Offer.
		coupon revenue	SUM(CMP_PROMO_DEAL_RESULT.DIRECT_REVENUE) for the Coupon Code, Promotion and Offer.

ORCE Feature	Location	Tile/Data Field	Calculation
		Estimated distribution	CMP_PROMODEAL_COUPONCODE.ESTIMATED_DISTRIBUTION (If CMP_PROMO.COUPON_SERIALIZED_FLAG is set, then CMP_PROMODEAL_COUPONCODE.COUPON_GEN_COUNT is used instead)
		response %	(Count of distinct customers in CMP_PROMO_DEAL_RESULT for the coupon code, promotion, offer and target / Estimated distribution) * 100
	points for purchase	loyalty points tile	SUM(NUM_PTS) from LYL_LOYALTY_ACCT_ACT for the promotion
		average points per transaction	SUM(CMP_PROMO_DEAL_RESULT.LOYALTY_POINTS) / Count of distinct CMP_PROMO_DEAL_RESULT.RTL_TRAN_ID (Transaction Ids)
	response rate (tile)	total	COUNT of distinct Customer Ids in CMP_CUST_PROMO_TARGET for the promotion and target.
		sent	COUNT of CMP_CUST_PROMO_TARGET records where the EMAIL_DELIVERED_FLAG is set for the promotion and target.
		opened	COUNT of CMP_CUST_PROMO_TARGET records where the EMAIL_OPENED_FLAG is set for the promotion and target.
		clicked	COUNT of CMP_CUST_PROMO_TARGET records where the EMAIL_CLICKED_THROUGH_FLAG is set for the promotion and target.
		undeliverable	COUNT of CMP_CUST_PROMO_TARGET records where the EMAIL_UNDELIVERED_FLAG is set for the promotion and target.
		Net targeted	total - undeliverable
		net delivery	sent - undeliverable
		respondents	COUNT of distinct Customer Ids in CMP_CUST_PROMO_TARGET where the CUST_RESPONDED_FLAG = 1 for the promotion and target.
Promotion Scorecard continued	response rate (tile) continued	non- respondents	total - respondents
		net response rate	respondents / net delivery
		Response rate	respondents / total

ORCE Feature	Location	Tile/Data Field	Calculation
		award value	"For points promotions - Sum of the number of points (NUM_PTS) from Loyalty Account Activity (LYL_LOYALTY_ACCT_ACT) for the promotion and target. For other promotions: Award Certificate amount multiplied by the number of accounts linked to the promotion and target."
		redeemed award value	award value - remaining value (which is the sum of awd_award_coupons.amount for the award accounts linked to the promotion and target)
Offer Scorecard	Revenue LTD (tile	direct revenue	"SUM(CMP_PROMO_DEAL_RESULT.DIRECT_REVENUE) for the offer For Points Promotions, this value is always 0."
		last month revenue	This value is the total direct revenue as calculated above for the duration selected on the scorecard.
		response rate	respondents / Count of distinct customers from CMP_CUST_PROMO_TARGET for the promotion and offer
		respondents	Count of distinct customers from CMP_PROMO_DEAL_RESULT for the offer.
	Average Unit Retail (tile)	Direct Revenue	"SUM(CMP_PROMODEAL.DIRECT_REVENUE) For Points Promotions - Total Points = SUM(CMP_PROMODEAL.LOYALTY_POINTS) "
		total cost of goods sold	SUM(TRN_LINE_ITEM.ITEM_UNIT_COST) where VOID_FLAG=0 AND LINEITM_TYPCODE = Sale AND CMP_PROMO_DEAL_RESULT record exists for the transaction and offer
		total discounts	SUM(CMP_PROMO_DEAL_RESULT.TOTAL_DISCOUNT) for the offer
		average units sold	SUM(TRN_LINE_ITEM.ITEM_QUANTITY) where VOID_FLAG=0 AND LINEITM_TYPCODE = Sale AND CMP_PROMO_DEAL_RESULT record exists for the transaction and offer / Count of distinct RTL_TRAN_ID (Transaction Ids) from the CMP_PROMO_DEAL_RESULT table for the offer.
		margin %	(net profit / direct revenue) * 100
		net profits	direct revenue - total cost of goods sold
Segment Scorecard	stratified, unstratified, personal list	customer in segment	Count of CUST_ID from CST_CUSTOMER joined to QRY_USER_QUERY and QRY_CUSTOMER_SEGMENT tables for the segment

ORCE Feature	Location	Tile/Data Field	Calculation
		average value	AVG(TOTAL_SALES_AMT) from CST_CUSTOMER joined to QRY_USER_QUERY and QRY_CUSTOMER_SEGMENT tables for the segment
		average days since purchase	AVG(Current date - CST_CUSTOMER.LAST_TRANS_DATE) joined to QRY_USER_QUERY and QRY_CUSTOMER_SEGMENT tables for the segment
Segment Scorecard continued	stratified, unstratified, personal list continued	average purchases LTD	AVG(CST_CUSTOMER.TOTAL_TRANS_COUNT) joined to QRY_USER_QUERY and QRY_CUSTOMER_SEGMENT tables for the segment
		LTD Spend	AVG(CST_CUSTOMER.TOTAL_SALES_AMT) joined to QRY_USER_QUERY and QRY_CUSTOMER_SEGMENT tables for the segment
		YTD Spend	AVG(CST_CUSTOMER.YTD_SALES_AMT) joined to QRY_USER_QUERY and QRY_CUSTOMER_SEGMENT tables for the segment
Program Home	all active program		Count of total programs in ACT_PROGRAM where the ACTIVE_FLAG = 1
	active tender outstanding balance		SUM(SVC_TENDER_ACCT.BALANCE * EXCHANGE_RATE obtained from DRV_CURRENCY_EXCHANGE_RATES) for all SVC_TENDER_PROGRAM records
	active award certrificates/value		SUM(AWD_AWARD_COUPONS.AWARD_AMOUNT * EXCHANGE_RATE obtained from DTV_CURRENCY_EXCHANGE_RATES) from AWD_AWARD_ACCT (Award accounts) where the EXPIRATION_DATE is null or greater than/equal to the current date.
	active loyalty oustanding points		SUM(EARNED_PTS_BALANCE) from LYL_LOYALTY_ACCT (Loyalty accounts)
Promotion Home	promotion revenue LTD		SUM(CMP_PROMO_TRAN_RESULT.TRAN_TOTAL) for all promotions that are active on the current date and not terminated.
	offer revenue LTD		SUM(CMP_PROMO_DEAL_RESULT.DIRECT_REVENUE) for all active promotions on the current date.
Segment Home	total active		Count of QRY_USER_QUERY (segment) records where there is a Job associated (job_job_def) that has the enabled_flag set.

ORCE Feature	Location	Tile/Data Field	Calculation	Metric/Graph
Tender Program Scorecard	accounts analysis (toggle)	active account rate	The percentage of currently active accounts out of the total number of cards.	metric

ORCE Feature	Location	Tile/Data Field	Calculation	Metric/Graph
		current active accounts	The total number of accounts currently active for the program.	metric
		total cards	The total number of cards in all of the cards series for the program.	metric
		card series	The number of card series for the program.	metric
		active accounts	The number of active accounts by month.	graph
	activity analysis (toggle)	issued value LTD	The total value issued lifetime to date to all active account holders. This includes the activation amount, recharge amount and any amounts returned to the account.	metric
		issued value MTD	The total value issued month to date to all active account holders. This includes the activation amount, recharge amount and any amounts returned to the account.	metric
		redeemed value LTD	The total value redeemed lifetime to date for all active account holders. This includes the cash out amount, post authorize amount, redeemed amount and service charge amount.	metric
		redeemed value MTD	The total value redeemed month to date for all active account holders. This includes the cash out amount, post authorize amount, redeemed amount and service charge amount.	metric
		outstanding balance	The total value issued that has not yet been redeemed for all active account holders.	metric
		average balance per account	The average balance held on account for all active account holders. This is calculated by dividing the total outstanding balance by the total number of active accounts.	metric
		issued value	The total value issued by month.	graph
		redeemed value	The total value redeemed by month.	graph
		outstanding balance value	The total oustanding balance for all active account holders by month.	graph

ORCE Feature	Location	Tile/Data Field	Calculation	Metric/Graph
Award Program Scorecard	analysis	redemption rate LTD	The percentage of lifetime to date awards redeemed from those that have been issued.	metric
		outstanding e-award value	The total value of e-awards available for redemption.	metric
		customers in program	The percentage of customers that are active members for the program. This includes both primary and secondary account holders.	metric
		current active accounts	The total number of currently active accounts. This includes registered and anonymous accounts.	metric
		registered accounts total	The total number of accounts that are registered to customers and are not anonymous for the program.	metric
		registered accounts percentage	The percentage of active accounts that are registered to customers compared to all accounts (registered plus anonymous) for the program.	metric
		issued awards	The total number of award certificates and e-awards issued by month.	graph
		issued award certificates	The total number of award certificates issued by month.	graph
		issued e-awards	The total number of e-awards issued by month.	graph
		redeemed awards	The total number of award certificates and e-awards redeemed by month.	graph
		redeemed award certificates	The total number of award certificates redeemed by month.	graph
		redeemed e-awards	The total number of e-awards redeemed by month.	graph
		outstanding awards	The total number of award certificates and e-awards issued but not yet redeemed by month.	graph
		outstanding award certificates	The total number of award certificates issued but not yet redeemed by month.	graph
		outstanding e-awards	The total number of e-awards issued but not yet redeemed by month.	graph
		outstanding e-award balance	The total value of e-awards available for redemption by month.	graph

ORCE Feature	Location	Tile/Data Field	Calculation	Metric/Graph
Loyalty Program Scorecard	accounts analysis (toggle)	customers in program	The percentage of customers that are active members for the program. This includes both primary and secondary account holders.	metric
		current active accounts	The total number of accounts currently active for the program.	metric
		registered accounts total	The total number of accounts that are registered to customers and are not anonymous for the program.	metric
		registered accounts percentage	The percentage of active accounts that are registered to customers compared to all accounts (registered plus anonymous) for the program.	metric
		newly registered accounts	The total newly registered accounts by month. The total can be filtered down by loyalty level.	graph
		total registered accounts	The total registered accounts by month. The total can be filtered down by loyalty level.	graph
	accounts analysis (toggle) accounts summary	percent of program	The percentage of all active accounts in the loyalty program level compared to the entire program. This includes both registered and anonymous account holders.	accounts summary
		points issued	The total number of lifetime to date points issued to all active account holders for the loyalty level. This includes both earned and bonus points. Escrow points are excluded.	accounts summary
		points redeemed	The total number of lifetime to date points redeemed by active account holders for the loyalty level.	accounts summary
		members who received points	The total number of unique customer ID's associate with a points issue transaction for the loyalty program level. This includes both primary and secondary account holders.	accounts summary

ORCE Feature	Location	Tile/Data Field	Calculation	Metric/Graph
		average points balance	The average points balance for all active accounts for the loyalty program level. This includes both registered and anonymous account holders. This is calculated by dividing the total earned points balance by the total number of active accounts.	accounts summary
	activity analysis (toggle)	points issued LTD	The total number of lifetime to date points issued to all active account holders for the loyalty level. This includes both earned and bonus points. Escrow points are excluded.	metric
		points issued MTD	The total number of month to date points issued to all active account holders for the loyalty level. This includes both earned and bonus points. Escrow points are excluded.	metric
		points redeemed LTD	The total number of lifetime to date points redeemed by active account holders for the program.	metric
		points redeemed MTD	The total number of month to date points redeemed by active account holders for the program.	metric
		outstanding points	The total number of points issued that have not yet been redeemed. This includes both earned and bonus points. Escrow points are excluded.	metric
		average balance per account	The average points balance for all active accounts for the loyalty program. This includes both registered and anonymous account holders. This is calculated by dividing the total earned points balance by the total number of active accounts.	metric
		issued value	The total points issued by month. The total can be filtered down by loyalty level.	graph
		redeemed value	The total points redeemed by month. The total can be filtered down by loyalty level.	graph
		outstanding balance value	The total points issued but not yet redeemed by month. The total can be filtered down by loyalty level.	graph

ORCE Feature	Location	Tile/Data Field	Calculation	Metric/Graph
	activity analysis (toggle) accounts summary	percent of program	The percentage of all active accounts in the loyalty program level compared to the entire program. This includes both registered and anonymous account holders.	accounts summary
		points issued	The total number of lifetime to date points issued to all active account holders for the loyalty level. This includes both earned and bonus points. Escrow points are excluded.	accounts summary
		points redeemed	The total number of lifetime to date points redeemed by active account holders for the loyalty level.	accounts summary
		members who received points	The total number of unique customer ID's associate with a points issue transaction for the loyalty program level. This includes both primary and secondary account holders.	accounts summary
		average points balance	The average points balance for all active accounts for the loyalty program level. This includes both registered and anonymous account holders. This is calculated by dividing the total earned points balance by the total number of active accounts.	accounts summary