



# **TIBCO® Reward**

## **User Guide V3**

*Version 22.3.0  
August 2022*



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# TIBCO Reward CRMS Overview

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This chapter gives an overview of TIBCO Reward's Customer Relationship Management Suite (CRMS).

## Topics:

- [Software as a Service](#)
- [Features and Benefits](#)

## Software as a Service (SaaS)

Designed from the ground up as a Software-as-a-Service (SaaS) solution, TIBCO Reward does not license its software for installation on corporate servers. Instead our clients rent the complete solution, including all normally required hardware, storage, application hosting, upgrades, quality assurance, site hosting, and integration. TIBCO Reward provides a SaaS solution, rather than a packaged enterprise software application, therefore you do not need to purchase, deploy, and maintain additional hardware and software. This approach dramatically reduces complexity and costs.

TIBCO Reward's SaaS solution provides your company with a hosted application. This software delivery method provides remote access to the software and its functions as a web-based service. Your company can use and benefit by the TIBCO Reward solution without the outright purchase of a licensed software application.

TIBCO Reward performs the data processing and maintains the database and therefore you do not need extensive knowledge of the software to establish your own TIBCO Reward CRMS and your own customer microsite (the loyalty site that your company's customers use). You can apply strategy and creativity to your data using the TIBCO Reward software.

## Features and Benefits

Clients use TIBCO Reward to build and strengthen customer relationships in several distinct ways, including:

- Loyalty programs
- Targeted customer email
- Campaign management
- Relationship marketing

Each of these avenues is defined as following.

**Loyalty Program:**

- Rewards customers with points and other retention-oriented incentives
- Manages accruals, redemptions, reward catalogs, customer tiers, rules-based promotional offers, and includes support email and a customer service application
- Includes campaign and support email messaging

**Email:**

- A full email service provider platform for developing and delivering targeted, relevant messages to anybody at any time
- Leverages the available customer database for improved targeting and personalization
- Includes deliverability reporting, personalization, WYSIWYG editor, event-based messaging, optimized delivery by ISP, and so on

**Campaign Management:**

- Generates and helps manage highly targeted and automated campaigns based on your transaction, demographic, and preference data
- A dynamic customer profiling system triggers messages as customers change their behavior

**Relationship Marketing:**

- Applies dynamic targeting to promotions and incentives to ensure relevance and avoid fraud
- Includes a collection of smaller applications including site personalization, clubs, refer a friend, hosted account management, questionnaires, and real-time cart integration

# TIBCO Reward Graphical User Interface and Navigation

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TIBCO Reward has a new Graphical User Interface (GUI).

The new user interface is simple and intuitive making it easy to use and navigate.

The new user interface has its own set of elements and navigation techniques. See [TIBCO Reward](#) to understand how to use TIBCO Reward.

## TIBCO Reward User Interface Elements

TIBCO Reward has a new user interface and the new user interface has some new elements. The list of user interface elements in the new TIBCO Reward UI are as follows:

### Sections

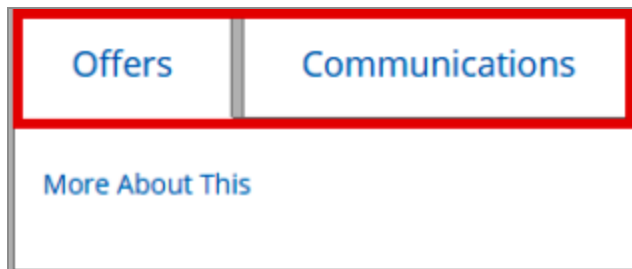
The TIBCO Reward user interface is divided into sections. Each section executes a certain set of tasks. The TIBCO Reward sections are as shown in the following screen shot:



### Tabs

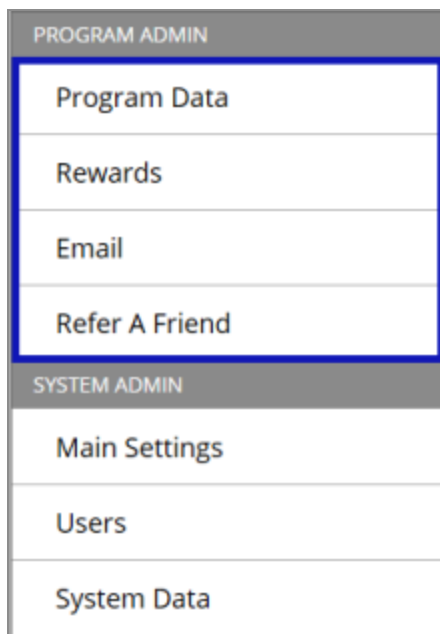
Tabs contain the list of details for the corresponding feature. Tabs are placed within the sections and each tab is for one feature only. An example for tabs is shown in the following screen shot:





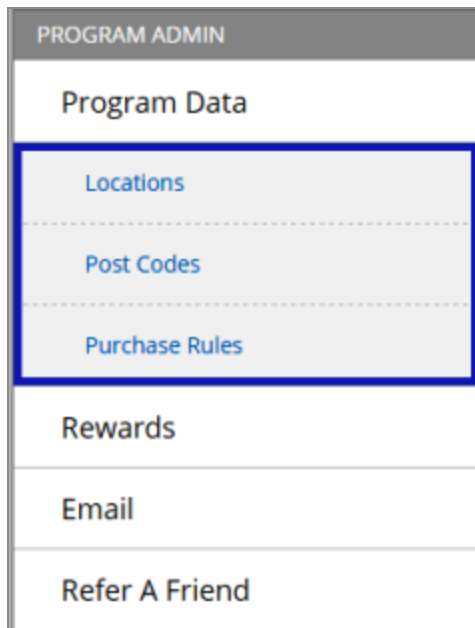
## Menus

Menus contain multiple features. Menus are placed within the sections. An example for menus is shown in the following screen shot:



## Menu Items

Menu items are subsets of a menu. Each menu item corresponds to a feature of TIBCO Reward. An example for menu items is shown in the following screen shot:



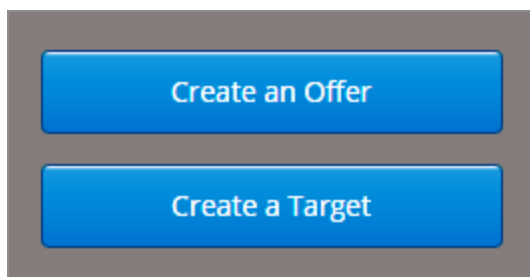
## Search Bar

You can use the search bars to search a specific record. Enter the phrase to be searched and press ENTER. An example of the search bar is as follows:



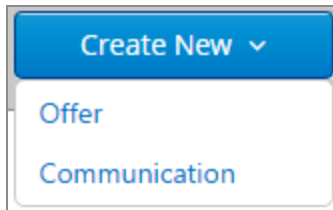
## Buttons

Buttons pass the control or completes the procedure. Click the button to perform the necessary action. An example of buttons are as follows:



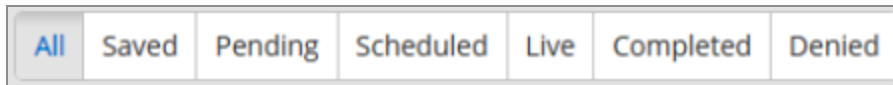
## Drop-Down Buttons

Drop-down button looks similar to a button but you have to click it to display the values in it. Select the values to pass the control to another page. An example of a drop-down button is as follows:



## Filter Buttons

Filter buttons filter the displayed results based on the values mentioned in the button. An example of filter buttons is as follows:



## Action Icons

Action icons perform certain actions when clicked. Some examples for actions performed by these icons are as follows:

- Edit
- Clone
- Delete

An example of action icons is as follows:



## View Icons

You can use the view icons to modify how the records are displayed. These are the two view options:

- List

- Thumbnail

An example of view icons is as follows:



## Navigation Bars

Navigation bars are used to navigate through the pages of records. You can use the navigation bars to do the following tasks:

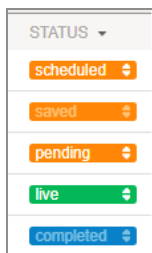
- Move to the next page
- Move to the previous page
- Move to the last page
- Move to the first page
- Move to a specific page number (five page numbers are displayed at a time)

An example of a navigation bar is as follows:



## List Boxes

List boxes are similar to drop-down boxes and contain values, which you select to set the status of an object.

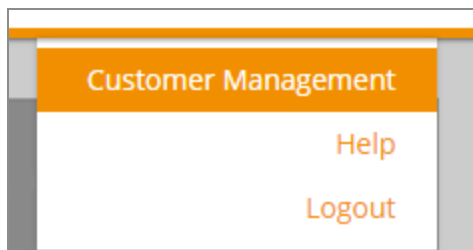


# Accessing the Customer Management or Customer Service Representative (CSR) Tool

If you want to access the Customer Management or CSR tool, perform the following steps:

## Procedure

1. Hover the mouse over the user name. A drop-down menu is displayed.



2. Select the **Customer Management** option.

The CSR tool opens. Log in and access the CSR tool. Details related to the CSR tool are available in the CSR help file integrated with the tool.

# Accessing the TIBCO Reward Help

If you want to access the TIBCO Reward Help, perform the following steps:

## Procedure

1. Hover the mouse over the user name. A drop-down menu is displayed.



2. Select **Help**.

The TIBCO Reward help opens in a new window providing you documentation for TIBCO Reward User's Guide, Integration Guide, API Reference Guide, and CSR User's

Guide.

# TIBCO Reward Login and Logout

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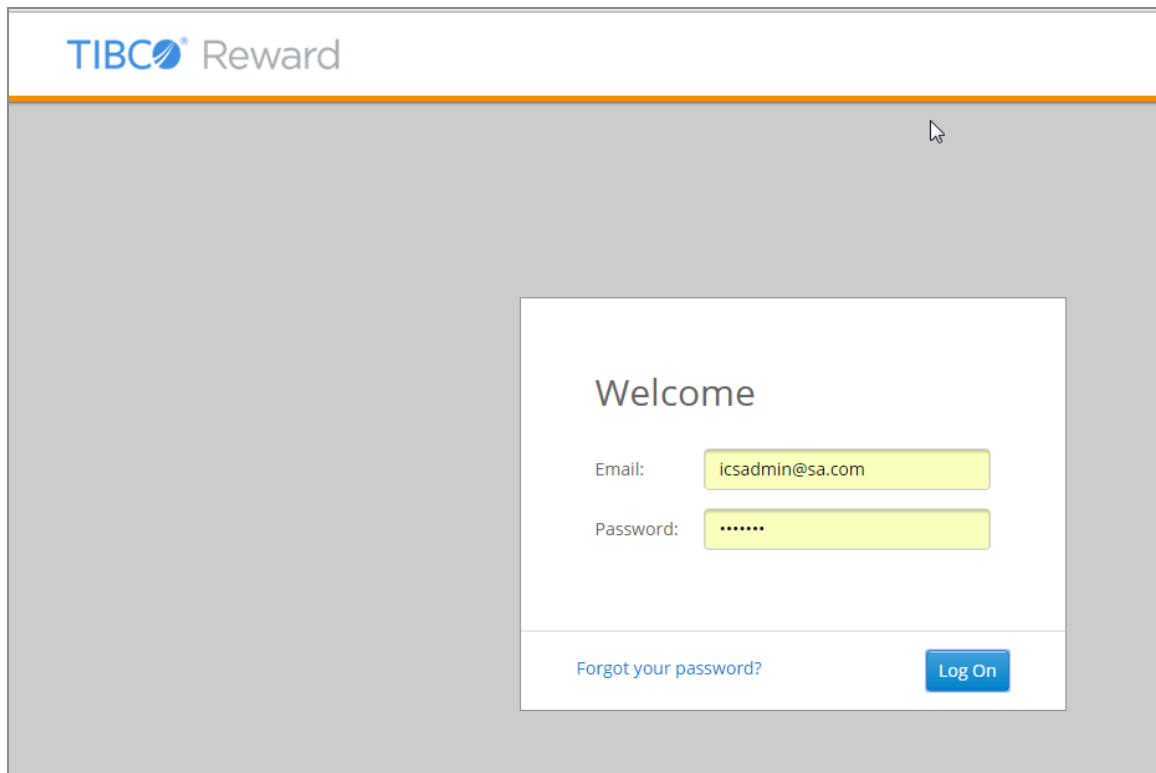
You have to log in to access the TIBCO Reward application. Upon login you can access the dashboard of the TIBCO Reward application.

## Logging in to TIBCO Reward

If you want to log in to the TIBCO Reward application, perform the following steps:

### Procedure

1. Enter the email address in the **Email** field.
2. Enter the password in the **Password** field.
3. Press the Enter key or click **Log on**.



TIBCO® Reward

Welcome

Email: icsadmin@sa.com

Password: .....

[Forgot your password?](#) [Log On](#)

**Result**

If you have entered the correct credentials, you are logged in and are redirected to the dashboard of the TIBCO Reward software. If you have entered incorrect credentials, you receive an error message. Re-enter the correct email address and password to access TIBCO Reward.

## Logging out of TIBCO Reward

If you want to log out of the TIBCO Reward application, perform the following steps:

**Procedure**

1. Hover the mouse over the user name. A drop-down menu is displayed.



2. Click **Logout**.  
You are logged out of the TIBCO Reward application.



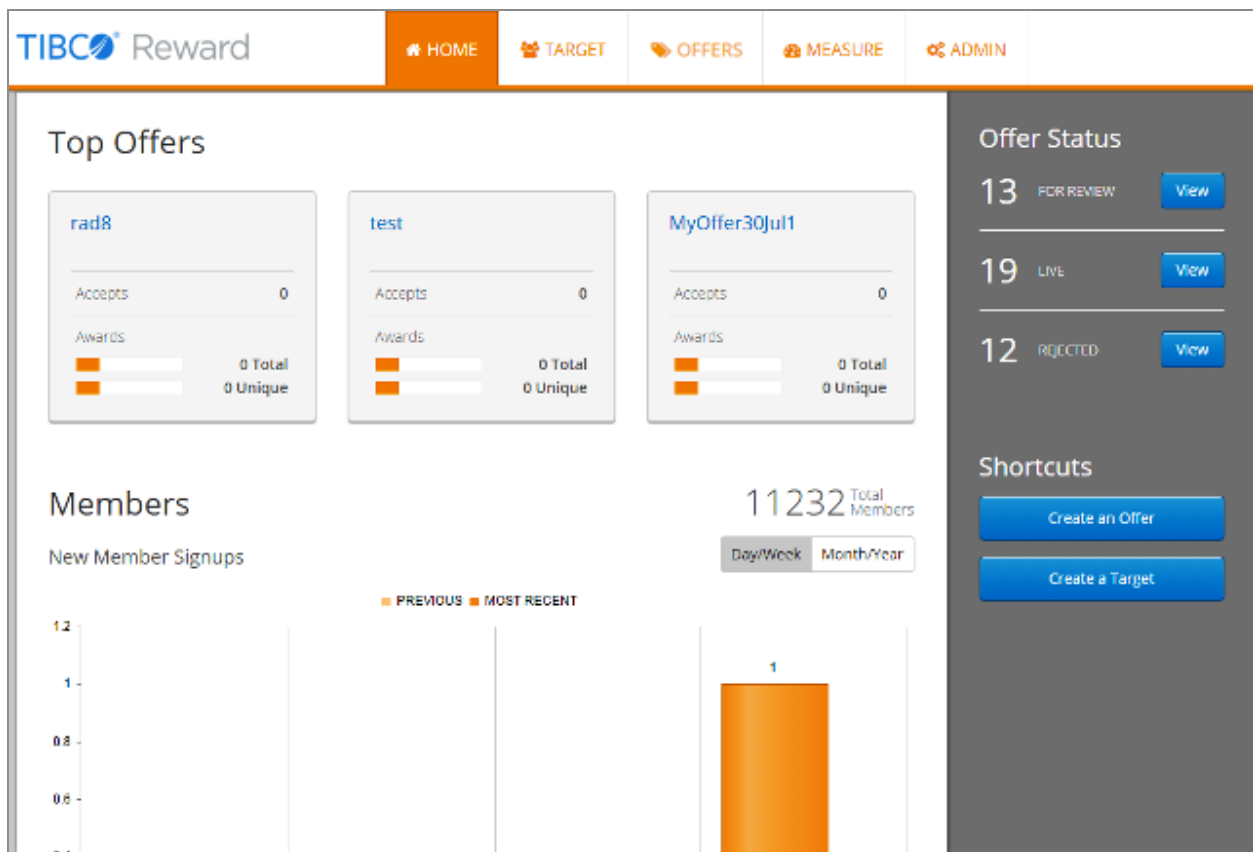
# Home Section

The **HOME** section provides access to the TIBCO Reward dashboard.

## TIBCO Reward Dashboard

The TIBCO Reward dashboard acts as the quick reference page and quick access page for the regularly used or important features of TIBCO Reward.

The screen shot of the TIBCO Reward dashboard is as follows:



The dashboard displays the following for quick reference:

- **Top Offers**

- **Members**
- **Offer Status**

The dashboard also provides shortcuts to the following tasks:

- **Create an Offer**
- **Create a Target**

# Target Section

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This section explains how targeted customer profiles are created with the use of profile filters and customer lists.

## Customer Profiles

### About Customer Profiles

A customer profile defines a segment of the customer population, and each profile is composed of one or more dimensions specified with the CRMS targeting features. Customer profiles are used to target offers and emails to the appropriate customers.

A customer profile applies logical filtering criteria to the customer population. These criteria are based on demographics, purchasing records, customer surveys, email behavior, and other sources.

 **Note:** Each CRMS customer profile yields a dynamically defined list of customers. The logical conditions associated with any given customer profile are applied to customer data that is updated nightly. This means that customer profiles always represent up-to-date results. It also means that using the same profile on two different days can yield two different target lists.

### Customer Profile: Filters

A customer profile is defined by a set of filters. For each customer profile, you can select the filters to use, and then set the parameters for each filter.

Customer profiles are often composed of multiple filter that are used together. You can use multiple filters to define a profile that includes more conditions and represents a more specific segment.

To understand exactly how any given profile targets customers, you must understand which filter it uses and how these filters are defined for that profile.

## Customer Profiles: Page Features

Select **Target** to open the **Customer Profiles** page. The **Customer Profiles** page provides access to all customer profiles, and helps you create and edit each customer profile.

The screenshot shows the TIBCO Reward Customer Profiles page. The navigation bar includes links for HOME, TARGET, OFFERS, MEASURE, and ADMIN. The main content area has tabs for CustomerProfiles and Customer Lists, along with a 'Create New' button. A search bar is located above the table. The table lists customer profiles with the following columns: ID #, CUSTOMER PROFILE NAME, INTERNAL NOTE, UPDATED, and ACTIONS. The table contains 15 rows of data. At the bottom, there is a pagination bar showing 'Showing 1 to 15 of 790' and a set of navigation arrows.

| ID # | CUSTOMER PROFILE NAME              | INTERNAL NOTE        | UPDATED               | ACTIONS                                     |
|------|------------------------------------|----------------------|-----------------------|---|
| 4335 | vprofile2                          | dsfa                 | 10/22/2015 5:33:40 PM | <a href="#">Edit</a> <a href="#">Delete</a> |
| 4379 | Acme Industries                    | For testing purposes | 10/22/2015 4:23:12 PM | <a href="#">Edit</a> <a href="#">Delete</a> |
| 4340 | dfsafdaf                           | dfsafdsf             | 10/20/2015 5:09:07 PM | <a href="#">Edit</a> <a href="#">Delete</a> |
| 4323 | MyProfile09Oct4                    | MyProfile09Oct4      | 10/13/2015 9:16:59 AM | <a href="#">Edit</a> <a href="#">Delete</a> |
| 4330 | test                               |                      | 10/13/2015 1:17:20 AM | <a href="#">Edit</a> <a href="#">Delete</a> |
| 4322 | MyProfile09Oct1                    | MyProfile09Oct1      | 10/9/2015 5:10:51 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| 4321 | MyProfile09Oct2                    | MyProfile09Oct2      | 10/9/2015 4:52:07 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| 4320 | MyProfile09Oct1                    | MyProfile            | 10/9/2015 4:12:25 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| 4292 | Automation Profile                 |                      | 10/9/2015 4:09:56 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| 4317 | rad1                               |                      | 10/8/2015 3:11:50 PM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| 4313 | Copy of Copy of Automation Profile |                      | 10/8/2015 2:47:31 PM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| 4306 | Copy of Automation Profile         |                      | 10/5/2015 5:42:59 PM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| 4299 | fdf                                | dsfsd                | 9/29/2015 7:11:43 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| 4298 | dfs                                | sdfs                 | 9/29/2015 7:11:19 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| 4294 | test                               |                      | 9/28/2015 12:00:40 AM | <a href="#">Edit</a> <a href="#">Delete</a> |

Showing 1 to 15 of 790

Navigation: << < 1 2 3 4 5 ... > >>

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Each row in the list represents a customer profile record, and displays a few key fields in that record. Click a column heading to sort all of the profiles in the listing by that field.

The following fields are displayed:

### **ID # (the unique profile ID number)**

CRMS assigns a unique ID number to every customer profile record. If two or more profiles names (which are defined by CRMS users) are similar or identical, this number is the unique identifier.

### **CUSTOMER PROFILE NAME**

The name of the customer profile as defined in CRMS. Click **Customer Profile Name** to open the record, either to see or edit its details.

### **INTERNAL NOTE**

This summarizes the crucial dimensions of the customer profile. Through this, users can determine the purpose of a profile without opening each customer profile dimension to see how it is set up.

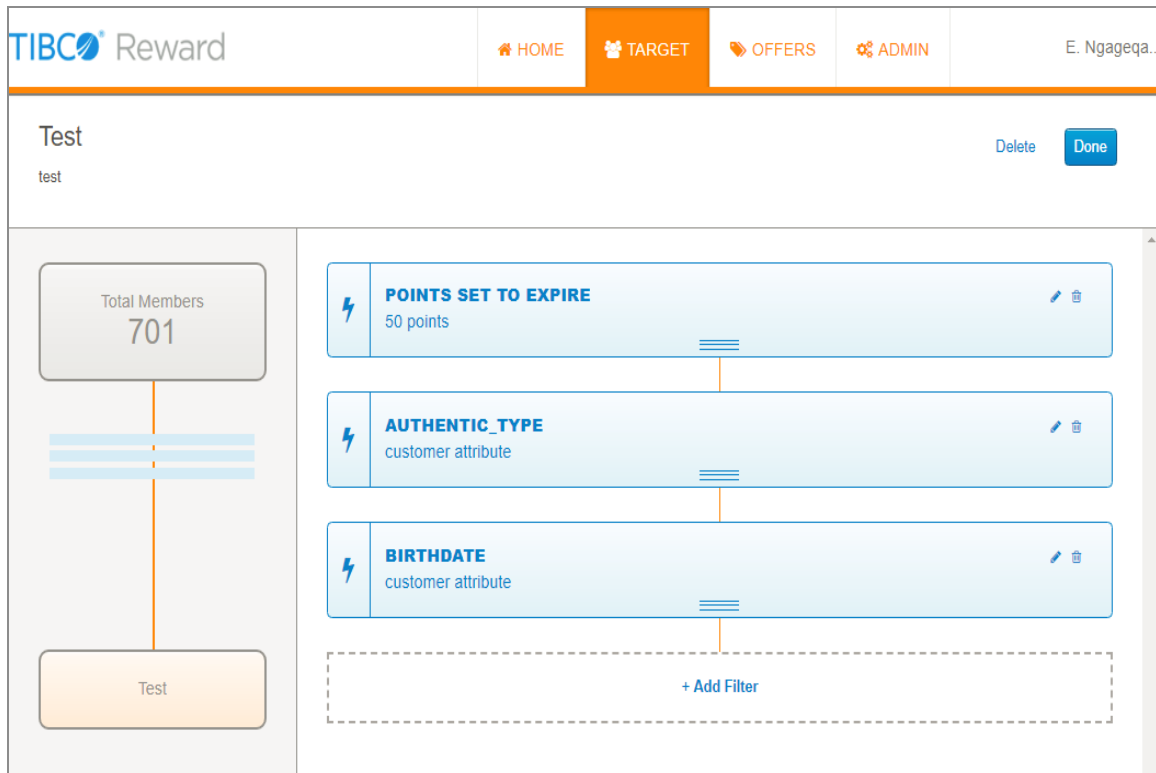
### **Updated**

The date when the customer profile was created or most recently changed. This is the field used by default to sort the profile records. When you open the **Customer Profiles** page, the most recently updated customer profile records are displayed first.

The following functions are supported:

- **Edit** : you can edit the associated customer profile record.
- **Clone** : you can clone the associated customer profile record.
- **Delete** : you can delete the associated customer profile record.

# Customer Profile Left Panel



The left-panel of the customer profile create page displays the following behaviors:

- When a user first visits the customer profile page the left panel displays the total number of program members in the upper section, preceded by the text “**Total Members**”. This value is calculated from the number of non-deleted shopper records that are marked either as enrolled or registered, regardless of whether or not they are marked as active.
- Customer profile name once entered is displayed in another section at the bottom of the panel. And, eventually the filtered profile count is displayed there.
- The profile name can contain up to 100 characters. When a profile name is long, it is displayed followed by "....".
- An orange vertical line connects the top and bottom sections.
- For each saved filter included in a profile, a horizontal blue bar is displayed on the orange line. A maximum of 10 blue bars can be displayed representing 10 filters associated with the particular profile.

# Creating Customer Profile

## Procedure

1. Click **Target > Create New > Customer Profile**.

When the new page opens, a new customer profile record has been created, and the Profile configuration panel is open.

2. Specify the name and provide description for the new customer profile record.
  - a. In the **Customer Profile Name** field, enter a name that is unique and succinct.
  - b. In the **Internal Notes** field, provide internal description.

3. Click **Add Filter**.

4. Click the name of a profile filter that you wish to apply with the current customer profile, and define the details of that filter.

When you click the name of a filter, the corresponding filter configuration panel opens. This panel provides the tools you can use to define the details of the filter (also known as the "conditions" of the filter). Each filter configuration panel provides different tools. For details about the different filters, their configuration tools, and how to apply them, refer to [Profile Filters](#).

5. After you define a filter, click **Save**.

The filter is added to the profile and is displayed in a horizontal bar in the right panel. You can edit or delete the filter using the edit and delete icons provided.

6. Repeat steps 4 and 5 for each filter you want to define for the profile.
7. After you define all the filters for the profile, click **Done** to save and close the profile.

**i Note:** Do not click **Done** unless you want to save and close the current profile with all filters in their current state.

## Existing Customer Profile

To open an existing customer profile record for editing, start from the **Target > Customer Profiles** page, and click the **Customer Profile Name** associated with the record. The Profile editor is displayed with the following information.

- The **Customer Profile Name**. This is the unique name for this profile that is displayed on the **Target > Customer Profiles** page.
- The **Internal Notes** for the profile. This summarizes the crucial filters of the profile so that potential users can quickly determine its purpose without opening each currently defined profile filter to see how it is set up.
- Total members enrolled for the profile.
- The filters defined for the current profile are shown in the horizontal blue bars in the right panel. You can also add filters by clicking **Add filter**. See [Profile: Filters](#) for detailed information about each listed filter and how to work with it.

## Editing Customer Profile

### Procedure

1. In the **Target > Customer Profiles** page, click the customer profile name of the profile record you want to edit. You can also click the edit hyperlink of the corresponding profile record.  
The profile configuration panel is open.
2. Change the name or description or both, as appropriate, to reflect the purpose of the customer profile record.
  - a. In the **Customer Profile Name** field, enter a name that is unique and succinct.
  - b. In the **Internal Notes** field, provide internal description.
3. Click **Add Filter** to add new filters to the customer profile record.  
A panel listing the available filters is displayed.
4. Click the name of a filter you wish to define for the current profile, and specify the details of that filter.  
When you click the name of a filter, the corresponding filter configuration panel is displayed. This panel provides the tools you can use to define the details of the filter (also known as the "conditions" of the filter). Each filter configuration panel provides different tools. For details about the different filters, their configuration panels and tools, and how to apply them, see [Profile Filter: Definitions](#).
5. After you define a filter, click **Save**.



**i Note:** Do not click **Done** unless you want to save and close the current profile with all filters in their current state.

A filter gets added to the profile and is displayed in a horizontal bar in the right panel. You can edit or delete the filter using the edit and delete icons provided.

6. Repeat steps 4 and 5 for each filter you want to define for the profile.

## Cloning Customer Profile

### Procedure

1. Find the profile record in the **Target > Customer Profiles** page.
2. Click **Clone** in the row of the desired profile record.

This creates a copy of the original profile. The cloned copy of a profile record includes all of the data in the original with the following exceptions:

- The clone is assigned a new, unique numerical ID. This is a system requirement.
- The clone of a record named "XXX" is automatically renamed "Copy of XXX".
- The Profile Updated date is, by default, reset to the date when you create the clone.

The following are some tips for using a cloned customer profile record to create a new customer profile:

- Start by assigning the cloned copy its own new, unique, descriptive **Customer Profile Name** and **Internal Notes**.
- As you edit a clone, make sure the **Internal Notes** accurately reflect the filters and parameters you have defined.

## Deleting Customer Profile

Deleting a Customer profile removes a profile record from the listing in the **Target > Customer Profiles** page.

## Procedure

1. Find the profile record in the **Target > Customer Profiles** page.
2. Click **Delete** in the row of the profile record.

A dialog box is displayed with a prompt, "Are you sure you want to delete this customer profile?".

3. Click **OK** to delete the selected record or **Cancel** to cancel the action.

The customer profile record is no longer displayed in the list on the **Target > Customer Profiles** page.

**Warning!** You can not recover a customer profile that has been deleted.

# Profile Filters

## About Profile Filters

A profile filter is a set of logical conditions that is used to filter a customer population for targeting. Filters are used to define a customer profile.

In CRMS, you can use different types of filters, including: Attributes, Entities, Events, Location, Loyalty, Points, Purchases & RFM, Fixed.

When defined and activated, a filter tests the customer-related data made available by transaction files, customer profiles, and customer email behavior records. Because this data changes over time, the list of customers selected by any given filter also changes over time. The targeted segment is defined dynamically.

**i Note:** When you define a filter in CRMS, it serves as a dynamic customer segmentation tool. When defined and applied as part of a target profile, a defined filter can be applied repeatedly to an evolving current customer population base. Each time the filter defined in a profile is applied, it automatically selects customers based on the most recent customer data currently available in the Reward database.

## The Changing Set of Selected Customers

Ultimately, the defined filter represents a set of related logical conditions used to select sets of customers. Because Reward performs data updates every night, applying the same profile on two different days can yield two different sets of results.

## Profile Filters

Profiles are composed of one to many filters, and they are often composed of multiple filters that are used in concert with each other. A multi-filter profile includes more conditions and has the potential to represent a more specific segment.

When you create a new profile or edit an existing target profile, you must select and define the filter that this profile might use. When setting up a filter, click **+Add Filter** and the list of all the available filters is displayed. Each filter has several subfilters detailed in the following section.

## Attributes Filter

You can use the Attributes filter to specify conditions based on the custom attribute values.

After selecting a custom attribute, you can specify a set or range of values that the filter uses as logical matching criteria. If the value stored in the custom attribute field associated with a customer matches the values or logical test that you define, the customer meets a logical condition defined for the filter.

These custom attributes are special fields made available for use within CRMS, although they are not normally defined in the standard version of the CRMS database.

You can target customers whose custom attributes match the values that you designate. Custom attributes can be created within the **Admin > System Data > Attributes** tab. You can target as many of your custom attributes as you like, but you can only target each once within a given profile. The relationship between each attribute is an AND, which means that customers must match all attributes, and their criteria, to be selected.

## Adding Custom Attributes

### Procedure

1. Click **+Add Filter**.

A menu of available filters is displayed.

2. From the **Attributes** menu, choose the attribute you want to use for the current profile.

All the attributes that you have defined are displayed in this menu. Also, because you can target each one attribute only once within any given profile, after you add an attribute to target to, it is grayed out in the menu. You cannot select this attribute for the second time for this particular profile record.

The custom attribute is displayed within its own configuration panel.

3. Configure the values associated with the attribute and click **Save**.

The added custom attribute is displayed as the blue horizontal bar in the right hand panel.

4. If you want to define another custom attribute condition, choose another attribute from the **Attributes** menu, and repeat step 3.

## Editing Custom Attribute

### Procedure

1. Click the **Edit** icon associated with the custom attribute in the blue horizontal bar.

Custom attribute configuration panel opens up.

2. Configure the values associated with the attribute and click **Save**.

Refer to Administration: [Custom Attributes](#) for more information about Custom Attributes.

## Deleting Custom Attribute

### Procedure

1. Click the **Delete** icon associated with the custom attribute in the blue horizontal bar.

The attribute gets deleted.

## Entities Filter

You can target customers who match your custom entities by selecting an entity and then choosing from its set of entity attributes and setting their values. Custom entities and their associated attributes are initially created during your data integration and implementation phase.

You can target based on as many of your custom entities as you like, but you can only target each custom entity once within a given profile. When you select a custom entity, you must also pick one or more of the entity attributes for that custom entity and configure their values. Each entity attribute can only be chosen once.

The relationship between each custom entity and between each entity attribute is an AND, which means that customers must match all criteria for the custom entities and their attributes to be selected.

Choose the custom entity you would like to target from the **Entities** menu. Note that because you can target each custom entity only once within any given profile, after you add a custom entity to target to, it is grayed out and becomes non selectable in the **Entities** menu for that particular profile.

## Adding Custom Entities

### Procedure

1. Click **+Add Filter**.

A menu listing the available filters is displayed.

2. Select the custom entity you want to target from the **Entities** menu.

The entity configuration panel opens up.

3. Select an entity attribute from the **Add an Entity Attribute** pull down menu.

4. Click **Add**.

5. Configure values for the particular entity attribute in the expandable section.

6. Click **Update**.

The configured values are saved for this particular entity attribute. You can remove or edit the entity attribute by clicking **Remove** or **Edit**.

7. Click **Save**.

The newly added custom entity is displayed as the blue horizontal bar in the right-hand panel.

## Events Filter

The generic event targeting provides you with flexibility in how you use a generic event to build a customer profile. For each event added to the profile, you can build profiles that segment customers. For example:

- Specify how many times a customer performed or did not perform the event in a certain time frame.
- If the object is a product, you can target customers that performed the action on any one specific product, a group of products, or any product in your product catalog.
- If **Event Value** has been enabled for the event, you must enter a value that can be used to further define the target profile. For example, for a product review, enter a number that describes the number of stars assigned to the reviewed product.

You can add multiple generic actions to a profile. This can be used, for example, to build a profile of customers who took a specific action on a group of products, or who took two related actions (for example, reviewed and invited a friend to join your online store and also reviewed a product).

## Creating a New Event Target Profile

### Procedure

1. Click **Target > Create New > Customer Profile**.

The customer profile configuration panel is displayed.

2. Specify a name and provide description for the new customer profile record.
  - a. In the **Customer Profile Name** field, enter a name that is unique and succinct.
  - b. In the **Internal Notes** field, provide internal description.

3. Click **+Add Filter**.

A menu listing the available filters is displayed.

4. Select the custom event you want to target from the **Events** menu.

5. Select the event occurrence values. (Note that event occurrence values change dynamically based on your selections.)
6. Enter a numerical Event Value, if available.
7. If the object is a product, specify whether the event applies to any product or one specific product.
8. Click **Save**.

The newly added event is displayed as a blue horizontal bar in the right-hand panel.

After you have created a customer generic event profile, you can associate the profile with an offer. With this offer you can award points or other awards to customers who exhibit the behavior captured in the event. You could also include the profile in an email campaign, for example, sending customers "thank you" emails when they take a specific action.

## Location Filters

You can use geolocations to define customer profiles based on proximity to store locations and can issue offers through communication channels that are relevant to the customer profiles. With the implementation of a mobile loyalty application on a GPS-enabled smartphone, program members can receive location-based messages and calls-to-action when they enable location services and opt-in to mobile messaging. For more details, refer to [Geolocations Overview](#).



### Note:

- Beta capabilities enable the configuration of mobile geolocations that can be included in shopper profiles targeting filters. Beta capabilities do not currently support delivery of geolocation targeted offers or messages to a customer's mobile device.
- **Important:** Because geolocation features are not complete (beta), if mobile geolocation targeting filters are included in a shopper profile, no shoppers qualify for offers or messages that use the shopper profile.

## Creating a Location Filter

Using location filters you can define geolocations that can be used to trigger offers and messages based on a customer location. Geolocations are most commonly defined around

your existing retail locations.

## Procedure

1. Click **+Add Filter**.

A menu listing the available filters is displayed.

2. Select the location filter you want to target from the **Location** menu.

The geolocation configuration panel is displayed.

3. Specify the fields **Location Rules** and **time(s)** for **Geolocation-Enter** and **Geolocation-Exit** filters.

For **Geolocation-Hover** filter, specify an additional **Hover Duration** field.

4. Click **Select Geolocations**.

Target: Geolocation window showing the available geolocations is displayed.

5. Drag and drop the required geolocation in the selection box.

6. Click **Save&Close**.

This returns you to the geolocation configuration panel.

7. Click **Save**.

The newly added geolocation filter is displayed as the blue horizontal bar in the right-hand column.

## Loyalty Filter

### Tiers

If you have implemented tiers in your loyalty program, you can use them to target customers who belong to each tier.

Tiers define segments of the loyalty program membership. For example, you can use point accruals as the criteria for tier membership. Then you can target customers to a tier based on the points they have accrued.



You can use the Reward software to evaluate customers for their tier memberships every night. A change in a customer's tier level may not take place until 36 to 48 hours after Reward receives the transaction data file that qualifies the customer for a tier-change.

### Example of Tiers

You can have three tiers: base, silver, and gold. Everyone who signs up is in the base tier. Customers who accrue 200 points qualify for the silver tier. Customers who accrue 400 points qualify for the gold tier. The decision to implement tiers is one of the basic program design decisions that a company typically considers when setting up its loyalty program.

## Awards

You can use the Awards filter to create a targeted profile of customers who have received or not received particular offers within a specified period of time.

## Creating Awards Filter

### Procedure

1. Click **+Add Filter**.

A menu listing the available filters is displayed.

2. Navigate to the **Loyalty > Awards** page.

Awards configuration panel is displayed.

3. Specify the field values appropriately.

4. Click **Select Offers**.

Select Offers window displaying the available offers is displayed.

5. Drag and drop the offer in the selection box.

6. Click **Save&Close**.

This returns you to the Awards configuration panel.

7. Click **Save**.

The newly added Awards filter is displayed as the blue horizontal bar in the right-hand column.

## Points Filter

You can use Points filter to target customers based on points activity during a time frame. Using this profile filter, you can encourage additional purchases by targeting customers who are approaching a reward threshold.

Target customers based on the following filters:

- **Points Accrued:** a defined number of points awarded (accrued) within a selected time frame.
- **Points Redeemed:** a defined number of points redeemed (used) within a selected time frame.
- **Net Points Activity:** a defined number of net points (points accrued, minus point redeemed) within a selected time frame.
- **Point Balance:** a current point balance satisfying the following conditions:
  - Less than or equal to a number
  - Between or equal to two numbers
  - Greater than or equal to a number.
- **Points Expired:** a defined number of points expired within a selected time frame.
- **Points Set To Expire:** a defined number of points scheduled to expire within a selected time frame.

## Current Point Balance Targeting

### Procedure

1. Click the **Enable Point Balance targeting** check box.
2. Select **Balance Type** from the following options:
  - Cumulative balance of all point groups
  - Monetary unit points group only
  - Votes point group only

**i Note:** Balance Type is displayed based on the program configuration.

3. Select the **Balance Evaluation:**
  - If you select **Less than or equal to a number**, you must enter that number.
  - If you select **Greater than or equal to a number**, you must enter that number.
  - If you select **Between or equal to two numbers**, you must enter two numbers to define a range.
4. Click **Save**.
5. The point balance filter is added and displayed as the blue horizontal bar in the right-hand panel.

## Fixed Filter

You can use lists filter to target customers who are members of one or more lists. With this filter you can target customers who are included in lists already existing in the database or lists imported from external sources. (Refer to [Lists](#) for information about creating and importing lists.)

**i Note:** The lists filter is only available to clients who are implemented on the real-time-enabled platform. For more information, contact your account manager. When targeting multiple lists, customers who are in one or more lists are targeted.

### Customer target list vs. Profile filter list

- When setting customer targeting for an offer, you have the ability to include any number of customer profiles and lists. Members who are included in the customer profiles or lists become eligible for such targeted offers. This is because the relationship between the lists and/or profiles is an OR statement.
- While targeting using the list filter of a customer profile, you can also use the lists combined with other targeting filters of the profile. The intended target has to be a member of the list and must meet the other profile criteria such as past purchase, and so on. This is because the relationship between customer profile filters is an AND statement.

## Customer Profile: Adding List

### Procedure

1. Navigate to **Target > Create New > Customer Profile**.

When the new page opens, a new customer profile record has been created, and the profile configuration panel is open.

2. Specify the name and provide description for the new customer profile record.
  - a. In the **Customer Profile Name** field, enter a name that is unique and succinct.
  - b. In the **Internal Notes** field, provide internal description.

3. Click **+Add Filter**.

A menu listing the available filters is displayed.

4. Click **Fixed > Lists**.

The lists configuration panel is displayed.

5. Click **Select Lists**.

This opens the List Picker window, which includes lists that have been created or imported.

6. Drag and drop the appropriate list into the selection box and click **Done Selecting**.

This returns you to the list configuration panel.

7. Click **Save**.

The list gets added and is displayed as the blue horizontal bar in the right-hand panel.

## Lists

### About Lists

A target list is a flat file containing a specific set of customers used for targeting email communications. Such lists are composed of customer email addresses that are stored in

your Reward customer database. These lists are managed by CRMS, and are listed in the **Target > Customer Lists** page. A valid target list consists of a list of valid email addresses, and must contain at least one such address.

**Note:** Import lists must be ASCII text files. Other formats may cause imports to fail.

Target lists are used as address lists for emails sent by a CRMS email communication. CRMS target lists are equivalent to the email lists that are used in e-commerce marketing.

Unlike CRMS Profiles, which dynamically define a population segment that can be used to target communications, target lists are static. In CRMS, a Target list is still treated as a flat file containing a specific set of customers, but after the target list is assigned a unique ID in CRMS, that CRMS list of customers cannot be edited. It can only be deleted. To change the content of a list, you must use it to create a new list and give it a new name.

## Customer Lists Page

Use the **Target > Customer Lists** page to create and work with lists. The **Target > Customer Lists** page provides a table including all currently defined target lists in CRMS.

**TIBCO® Reward**

HOME TARGET OFFERS MEASURE ADMIN

CustomerProfiles Customer Lists Create New

More About This

Search...

Ready In Progress Failed

| ID # | CUSTOMER LIST NAME | DESCRIPTION         | STATUS | COUNT | CREATED              | ACTIONS                                     |
|------|--------------------|---------------------|--------|-------|----------------------|---|
| 1064 | test-file-import   | testing description | Ready  | 7     | 9/28/2015 5:03:42 AM | <a href="#">Edit</a> <a href="#">Delete</a> |
| 1063 | vsc13              | dsadsada            | Ready  | 1     | 9/22/2015 1:13:45 AM | <a href="#">Edit</a> <a href="#">Delete</a> |
| 1062 | viru23             |                     | Ready  | 996   | 9/11/2015 2:06:54 AM | <a href="#">Edit</a> <a href="#">Delete</a> |
| 1061 | viren list 2       | dfs                 | Ready  | 1     | 9/11/2015 1:41:29 AM | <a href="#">Edit</a> <a href="#">Delete</a> |
| 1060 | virenlist          | dfsdfsdfs           | Ready  | 1     | 9/11/2015 1:18:26 AM | <a href="#">Edit</a> <a href="#">Delete</a> |
| 1059 | virenlist          | dfsdfsdfs           | Ready  | 1     | 9/11/2015 1:17:29 AM | <a href="#">Edit</a> <a href="#">Delete</a> |
| 1056 | testList1001       | test description    | Ready  | 7     | 9/8/2015 5:55:08 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| 1053 | dff                | dsfs                | Ready  | 1     | 9/7/2015 9:07:03 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| 1052 | sdewfew            | ewrwerwerwer        | Ready  | 995   | 9/7/2015 7:28:45 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| 1051 | vlist1             | dfdfs               | Ready  | 1     | 9/7/2015 7:15:47 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| 1050 | test555list        | testfdssfdsf        | Ready  | 7     | 9/7/2015 4:38:53 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| 1032 | Test78 edited      | MyTest7Sep1         | Ready  | 1     | 9/1/2015 3:51:19 PM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| 1031 | MyTest7Sep1        | MyTest7Sep2gff      | Ready  | 1     | 9/1/2015 5:37:10 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| 1030 | vtestb             | sdfsdfs             | Ready  | 1     | 9/1/2015 5:36:14 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| 1029 | vlist              | dfdsdfs             | Ready  | 1     | 9/1/2015 3:13:16 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |

Showing 1 to 15 of 97

1 2 3 4 5 ...

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You can create a new list using one of the following methods:

- **List From File Import** : create a list by importing into CRMS a customer list file (For example, a list produced by a third party) so that it can be used and managed as an existing CRMS list.
- **List From Profile** : create a list by applying a profile to a customer population to generate a new list. This list includes the customers whose data matched the profile definition.

Each row in the customer lists table represents a target list, and displays a few key fields of data about that list. These fields are lined up in columns. Click a column heading to sort all of the lists in the table by that field.

The following list data fields are displayed:

#### **ID (the unique list ID number)**

CRMS assigns a unique ID number to every list. If two or more list names (which are defined by CRMS users) are similar or identical, this number is the unique identifier.

#### **CUSTOMER LIST NAME**

The name of the list as defined in CRMS. This is set up as a hyperlink to the list properties data: the list's **Name**, **Source**, and **Description** fields. Click the list name to open the list properties data, either to see or edit its details.

#### **Description**

Any additional information about this list that might help you distinguish it from others, or recall its purpose, at a later date. Store notes about who created it, its purpose, the profiles or sources and how they were used, its unique content, and so on.

#### **Status**

The status of each list can be either Ready, In Progress, or Failed. Only lists whose status is Ready are currently available to use. The In Progress indicator should be displayed only for the period when a list is being processed. A list marked as Failed represents a failed attempt at creating a list. Failed lists should be deleted.

#### **Count**

The total number of customer records in the list.

## Created

The date when the list was originally assigned an ID. This date may be different from the date when the customer data was last updated.

The following functions are supported:

- **Edit** : you can edit the list.
- **Export** : you can generate a comma separated value (CSV) file containing the existing Reward customer data for the customers included in the list. The Export function delivers this file to the FTP location that your company uses to exchange files with Reward. The default name of the file is "ListExport"<ListName>\_<Date when list file was generated/exported>\_<UserName>.
- **Delete** - you can delete the associated list.

## Creating a List from File Import

To create a new list from file import, browse to **Target** tab and click **Create New > List From File Import**. Following fields are displayed.

### File Properties Section

- **Enter Name** : the list name displayed in the **CUSTOMER LIST NAME** column in the **Customer Lists** page
- **Enter Description** : any additional information about this list that might help you distinguish it from others, or recall its purpose, at a later date. Store notes about who created it, its purpose, the profiles or sources and how they were used, its unique content, and so on.
- **Enter Source** : this is used to specify the path and filename of the customer file to be imported.

File Requirement:

- Lists must be uploaded from a file on your computer.
- Lists must be in ASCII text format.
- **Accept terms and conditions** check box : this requires you to verify that the customers in the list to be imported meet the "opt-in" requirement.

### Settings Section

If your list is imported successfully, each email address is added to your customer database according to the following rules:

- **Import As**
- **Email Opt-In**
- **Updates**

You may wish to check these rules and change them if necessary, if they do not suit your purpose. As a rule, you must check these rules, and change them if necessary, before you start creating a new list by importing.

### Notifications Section

If you import a file, you can choose to receive notifications when the import has started and when it completes. The only requirement is your email address.

During an import, CRMS also checks for matches between imported email addresses and existing email addresses within your current Reward customer database. If a match is found, the complete existing record is used, which might make additional customer data available. Existing data is not changed.

## About List Imports

To work with a list of customers generated by a source outside CRMS, you must import the list into CRMS. Importing a target list (that is, uploading a customer list file from your desktop) is one method of creating a CRMS Target List. Importing a list file (typically a list that was created outside CRMS) makes that list available for use within CRMS.

**i Note:** Import lists must be ASCII text files. Other formats may cause imports to fail.

### How CRMS Processes an Imported List

When you import a new target list, CRMS performs standard tests to ensure the quality of the data and that it meets the rules established in your settings. During an import, CRMS also checks for matches between imported email addresses and existing email addresses within your current Reward customer database. If a match is found, the complete existing record is used, which might make additional customer data available. Existing data is not changed.



**i Note:** During import, all email addresses are checked for validity. If the number of badly formed addresses exceeds the allowed threshold, your import fails.

## Creating Target List from File Import

### Procedure

1. From the **Target > Customer Lists** page, select **Create New > List From File Import**.

The **Create List from Import** wizard is displayed.

The screenshot shows the 'Create List From Import' wizard in the TIBCO Reward application. The interface is divided into several sections:

- File Properties:** Contains three input fields: 'Enter Name...', 'Enter Description...', and 'Enter Source...'. Below these is a large area for file upload with the text 'Drag and drop file here or [Browse](#)'. At the bottom of this section is a checkbox labeled 'Accept terms and conditions' and a paragraph of legal disclaimer text.
- Information:** Provides a warning: 'Only .txt files with properly formatted emails separated by line breaks are accepted. During import, all email addresses are checked for validity. If the number of badly formed addresses exceeds the allowed threshold, your import will fail and will be terminated.' It includes a link to 'View Sample File'.
- Settings:** Contains three rows of settings:
  - 'Import As:' with 'New records are imported as' set to 'Registered customers'.
  - 'Email Opt-In:' with 'New records are added as' set to 'Email opt-in'.
  - 'Updates:' with 'Existing records will' set to 'Be updated via import'.
 A warning message follows: 'WARNING: This setting will allow customer data to be overwritten when an imported record's email address matches one already in the Loyalty Lab system. Once changed, the old data cannot be recovered. IT IS STRONGLY RECOMMENDED THAT YOU DO NOT USE THIS SETTING. Please contact Client Services for more information.'
- Notifications:** Includes a checkbox 'Receive an email when your list is ready' which is checked, and an email address input field containing 'icsadmin@sa.com'.

At the bottom right, there are 'Cancel' and 'Create' buttons. The footer of the page includes 'COPYRIGHT 2004 - 2015 TIBCO SOFTWARE INC.', 'Privacy Policy | Notices', and the 'TIBCO Reward' logo.


2. Define the List Properties: Enter text in the three fields: **Enter Name**, **Enter Description**, and **Enter Source**.

3. Select the source file.


a. Click **Browse**.

A standard dialog box, titled "Choose file", is displayed; you can navigate to the location of the list file you want to import.

b. Double-click one list, in .txt file format, from your computer. The dialog box closes.

 **Note:** Your list must contain one or more properly formed email addresses, separated by line breaks.

4. Read the text following the **Accept terms and conditions** check box. Verify whether the list you are uploading meets the criteria. If it does, select the check box.

 **Note:** If the list includes email addresses from customers who have not provided permission for emails to be sent to them, do not select the check box. Make the necessary changes outside of the CRMS platform.

5. Select **Settings (Import As, Email Opt-In, Updates)** for your purpose according to options available in the respective drop-down list.

6. To receive an email notification when your import is complete, enter an email address.

7. Click **Create** to complete the process.

A pop-up window is displayed with the message "Your list is being created and will be available shortly. You can return to the Lists page without affecting this process by clicking "OK"."

8. Click **OK**.

This returns you to the **Target > Customer Lists** page, and displays a new row of information for this list in the table. The Status field for a newly created list is very important, because it indicates whether the list was successfully created. The **Ready**, **In Progress** and **Failed** lists can be viewed through the respective tabs in the **Customer Lists** page.

- If the list creation process succeeds, the list is displayed in the **Ready** tab. This list is ready to use.

- If the list creation process fails, the list is displayed in the **Failed** tab. The list creation process failed and the list is not available.
- Depending on the complexity of the list creation task processing, the list may be displayed in "**In Progress**" tab for a few minutes until the processing is completed.

## Creating Target List from Profile

### Procedure

1. From the **Target > Customer Lists** page, select **Create New > List From Profile**.

The **Create List from Profile** wizard is displayed.

**TIBCO® Reward**

HOME TARGET OFFERS MEASURE ADMIN

### Create List From Profile

#### List Properties

Name

Description

Source

Select Profile

#### Information

A list will be created that includes all customers who are in the selected profile. This may include both registered program members and unregistered customers.

Cancel Save & Close

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2. Define **List Properties**:

- **Name** : create a name for this list. The list name is displayed on the table of lists on the **Target > Customer Lists** page.
- **Description** : use this field to record any additional information about this list that might help you distinguish it from others, or recall its purpose, at a later

date. Store notes about who created it, its purpose, the profiles or sources and how they were used, its unique content, and so on.

- **Source** : use this field to identify where the contents of the list came from; for example, you might specify a location and file, the list rental, the database, or a file containing an SQL search.

3. Select the source profile.

- a. Click **Select Profile**. The Select Profile dialog box is displayed.
- b. Find the profile you want to use. You can re-sort the profiles by Profile ID number, name, date of last update, number of registered or unregistered customers size.
- c. Click the corresponding **Select** link. The selected profile is added to the profile box in the **Create List from Profile** wizard.

4. To change your profile selection, click **Select Profile**, then repeat the previous step.

5. Click **Save & Close**.

A pop-up windows displays the message "Your list is being imported".

6. Click **OK**.

This returns you to the **Target > Customer Lists page**, and displays a new row of information for this list in the table. The status field for a newly created list is very important, because it indicates whether the list was successfully created. The **Ready**, **In Progress**, and **Failed** lists can be viewed through the respective tabs in the **Customer Lists** page.

- If the list creation process succeeds, the list is displayed in the **Ready** tab. This list is ready to use.
- If the list creation process fails, the list is displayed in the **Failed** tab. The list creation process failed and the list is not available.
- Depending on the complexity of the list creation task processing, the list may be displayed in the "**In Progress**" tab for a few minutes until the processing is completed.

## List Details

An existing CRMS target list includes a set of unique email addresses with a valid format. These email addresses already exist in the Reward customer database, where they serve as

a key identifier for customer records. Other data may also be associated with a customer record.

**Import List Format:** You can import the simplest form of a target list, that is, a list that is just a .txt file containing one or more properly formed email addresses, separated by line breaks.

For example:

JohnQEMailer001@AohL.com

JohannaQEMailer001@AohL.org

JonathinDohEMailer001@wahooo.com

You can import, manage, and use such lists using the CRMS **Target > Customer Lists** page.

**Export List Format:** When you use the CRMS **Target > Customer Lists** page to export a target list, you are actually exporting CRMS customer records associated with the email addresses.

Here is a row of sample customer data from the exported email list (spaces added)\*:

"99000000000000019", "53542359", "2007-01-30T13:50:17", "Dawn","Cristopher", "412  
Midland Avenue", "Apt 4E", "Emeryville", "CA", "94608", "US",  
"dawnbcristopher@wahoo.com", "5105551234", "9876543210000019"



**Note:** Actual lists include no spaces between values, only commas.

If the database includes any of the identified, customer-record data, this data is included in the export file. Missing data values are indicated by the absence of any character or space between the two commas that indicate the normal location of the data (,,).

If you exported a list that had no other data than the customer email address (which might well be the case if you had just imported the list, for example), only the email address would be included in each record, and commas would indicate that other data was missing.

## Data Validation and Import Settings

During import, all email addresses are checked for validity. If the number of badly formed addresses exceeds the allowed threshold, your import fails. If your list is imported successfully, it is processed according to rules specified in **Admin > Main Settings > List**

**Import Settings** . You may wish to check these rules, and change them if they do not suit your purpose.

# Offers Section

---

You can set offers and customize communications in the **Offers** section.

The **Offers** section provides access to:

- [Offers](#)
- [Communications](#)

## Offers Overview

Offers are central to the success of your customer engagement program.

Before you can create an offer, you must complete the following requirements:

- If you want to configure the offer targeting, you must create a customer profile or create a customer list. (See [Target Section](#) for more details).
- If you want to create an offer that requires a purchase, your company must provide TIBCO Engage with your transactions files. (See *TIBCO Reward Integration Guide* for more details).
- If you want to create an offer that requires the purchase of a specified product or category of product, you must provide TIBCO Reward with your product files and your transaction files. (See *TIBCO Reward Integration Guide* for more details).
- If you want to use the Points Per Event Value award type, you must create Events first.
- If you want to restrict purchase evaluation criteria to certain stores, you must create a list of stores first.
- If you want to use percent off (% off) or monetary unit off (monetary units off) awards, you must have real-time processes implemented with your e-commerce or POS system.
- If you want to use the Unique Reward Code award type, you must upload your inventory of code values before you issue them as rewards. (See [Reward Codes](#) for more details).

# Creating Offers

To create an offer, perform the following steps:

## Procedure

1. [Setting Up an Offer](#)
2. [Defining the Criteria](#)
3. [Selecting the Target](#)
4. [Finalizing the Display](#)
5. [Viewing the Summary](#)

## Setting Up an Offer

To set up an offer, perform the following steps:

### Before you begin

See [Creating Offers](#).

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HOME TARGET OFFERS MEASURE ADMIN

1. Setup Offer

Offer Name Enter Offer Name...

Award Type Select Award Type...

☐ Enable Custom Award Text

Exit Next: Define Criteria

1. Setup Offer

2. Define Criteria

3. Select Target

4. Finalize Display

5. Summary

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## Procedure



1. Enter the **Offer Name**.
2. Select the **Award Type**:

| Option                 | Description   |
|------------------------|---|
| Bonus                  | you can specify the Bonus Award, such as sending a gift card or a certificate.  |
| Money Off on Purchase  | you can define a specific Monetary Unit amount to be taken off a purchase price.  |
| Percent Off Purchase   | you can take a specific percentage, for example, 10%, off a purchase.   |
| Reward Code            | issues codes that can be redeemed for rewards. If you want use the Reward Code award type, you must create Reward Codes first. (See the Reward Codes section for more information).   |
| Points                 | Use this award type to specify the Points Type and number of points, which are awarded to qualifying members.   |
| Double Points          | If the qualifying customer normally receives 1 point per Monetary Unit according to you current customer engagement program rate, selecting Double Points causes that customer to receive 2 points per Monetary Unit. The Double Points award type may not be present depending on how your program is set up.        |
| Triple Points          | If the qualifying customer normally receives 1 point per Monetary Unit according to your current customer engagement program rate, selecting Triple Points causes that customer to receive 3 points per Monetary Unit. Note: The Triple Points award type may not be present depending on how your program is set up. |
| Points Per Event Value | you can set the number of points that a customer receives for each event value. If you want use the Points Per Event Value award type, you must create events first. (Refer to the Events section for more information.)  |

| Option                         | Description   |
|--------------------------------|---|
| Points Per Monetary Unit Spent | you can define a different point-earning rate based on the amount a customer spends on purchases. |
| Points per Quantity Spent      | you can define a different point-earning rate based on the quantity of items purchased.           |

3. If required, select the **Enable Custom Award Text** check box.
4. Click **Next: Define Criteria**.

### What to do next

See [Defining the Criteria](#).

## Defining the Criteria

To define the criteria, perform the following steps:

### Before you begin

See [Setting Up an Offer](#)

**TIBCO Reward** | HOME | TARGET | OFFERS | ADMIN | E. Ngageqa...

TEST OFFER ID: 16885

### 2. Define Criteria

**Qualifying Action**  
 Make a purchase  
 Qualifying purchase must meet the following rules  
 Purchase Type: Any Product  
 Quantity or Spend: Select Quantity Or Spend...  
 Qualification Level: Select Qualification Level...

**Purchase Restrictions**  
 Store Restrictions:  
☒ No Store Restrictions  
☐ Enable Store Restrictions  
 Transaction Restrictions:  
☒ No Transaction Restrictions  
☐ Enable Transaction Restrictions

**Schedule**  
 Evaluation Start: 4/5/2019 12:00 AM  
 Evaluation End: 7/4/2019 11:00 PM  
 Qualification Period: Until offer end date

**Best Point Offer**  
 When a transaction qualifies for more than one offer, the offer that awards the most points is used  
☒ Disable  
☐ Enable

**Award Limit**  
☐ No Limit  
☒ Maximum number of awards: 2 for offer duration

**Additional Conditions**  
☒ No Additional Conditions  
☐ Enable Additional Conditions

Exit Delete Previous Next: Select Target

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1. Setup Offer  
 Name: Test Offer  
 Award: Get 7 points  
 Quantity - 7  
 Point Type - Base

2. Define Criteria

3. Select Target

4. Finalize Display

5. Summary

## Procedure

- Set the **Qualifying Action**, which defines how a targeted customer qualifies for the offer. Qualifying actions can be:
  - Make a Purchase
  - Complete an Event
  - Don't need to do anything
- If you choose the **Make a Purchase** qualifying action, specify if there should be **Purchase Restrictions**. By enabling **Purchase Restrictions** you can set up conditions (Purchase Rules) that must be met, for a customer's transaction to qualify for an offer. (Refer to the "Administration" section for more information about purchase rules).
- In the schedule section, set the **Evaluation Start & Evaluation End** dates and

**Qualification Period.**

4. You can enable **Best Point Offer**, which gives the award with the highest point if a customer qualifies for more than one offer.
5. In the Award Limit frame, you can enable either **No Limit** or **Maximum number of awards**. If **Maximum number of awards** is enabled, you can enter the number of times a member can earn an award based on selected option: **per day**, **per week**, **per month** and **for offer duration**. By default the redemption limit is 1. We can assign any integer as the redemption limit. If we do not specify any limit, it means that we can redeem the offer n number of times.



**Note:** The option **per month**, in the time-frame drop-down box for the redemption limit, does not work for batch processing. It will work only if RadRacer is installed with TIBCO Reward.

6. Optionally, enter any **Additional Conditions** required to qualify for the offer.
7. Click **Next: Select Target** to proceed or click **Back** to return to the previous step.

**What to do next**

See [Selecting the Target](#).

## Selecting the Target

In this step, specify the customer segment, to which you target the offer. To select a target, perform the following steps:

## Before you begin

See [Defining the Criteria](#).

The screenshot displays the '3. Select Target' interface within the TIBCO Reward system. At the top, a navigation bar includes links for HOME, TARGET, OFFERS, MEASURE, and ADMIN. The main content area is titled '3. Select Target' and features a 'Customer Target' section. This section contains two radio button options: 'Include all registered customers' and 'Include selected customer profiles and lists' (which is selected). To the right of these options, the 'Target Estimates' are shown as '997'. Below the radio buttons are two large text input fields labeled 'Select Profiles' and 'Select Lists'. At the bottom of the main area are 'Exit', 'Delete', 'Back', and 'Next: Finalize Display' buttons. A sidebar on the right provides a overview of the offer setup process, with five steps: 1. Setup Offer, 2. Define Criteria, 3. Select Target (the current step, highlighted in blue), 4. Finalize Display, and 5. Summary. Each step includes a brief description of its content.

**i Note:** Before you can set the offer targeting, you must create a customer profile or create a customer list. (See the targeting section for more information).

## Procedure

1. In the **Select Target** page, select the customer segment to be included in the targeting. The choices are:
  - **Include all registered customers.**
  - **Include selected customer profiles and lists** (You must have created a customer profile or created a customer list for this option).

2. If you select **Include all registered customers**, click the **Next: Finalize Display** button to proceed.
3. If you select **Include selected customer profiles and lists**, you must specify a customer profile or list to be targeted.
  - a. Select profiles to be targeted by clicking **Select Profiles** and performing drag and drop.
  - b. Select lists to be targeted by clicking **Select Lists** and performing drag and drop.
4. Click the **Next: Finalize Display** button to proceed or click the **Back** button to return to the previous step.

### What to do next

See [Finalizing the Display](#).

## Finalizing the Display

In this step, you define the look and feel of how your offer is displayed to program members. You can specify images and text that is displayed in the offers section of your microsite. To finalize the display, perform the following steps:

## Before you begin

See [Selecting the Target](#)

TIBCO® Reward

HOME

TARGET

OFFERS

MEASURE

ADMIN


DSAFDSFA

ID: 11238

4. Finalize Display

Offer Image

optional



Drag and drop files here or  
[Browse for an image from your computer](#)

Image should be .jpg, .gif, .bmp or .png format and no larger than 1 MB in size.

Headline

Enter Headline

Description

Enter Description

Terms & Conditions

Enter Terms & Conditions

Publish Settings

optional

☐ Do not display this offer  
☐ Set offer display order  
☐ Enable advanced offer publish settings

Internal Note

optional

Enter Internal Note

Exit

Delete

Back

Next: View Summary

1. Setup Offer

Name: dsafdsfa

Award: Get bonus

Description - 45

Best Basket Award - 0

2. Define Criteria

Buy 45 of any product

Qualify Dates: Oct 27,2015 - Jan 26,2016

Include: All baskets

Exclude: None

3. Select Target

Customer Target Profile

Include: 1 item(s)

Exclude: 0 item(s)

List

Include: 1 item(s)

Exclude: 0 item(s)

4. Finalize Display

5. Summary

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TIBCO® Reward

## Procedure

1. Select **Offer Image** by dragging and dropping one.
2. Define the **Offer Headline**.
3. Enter the **Offer Description**.

4. Set the **Offer Terms & Conditions**.
5. In the **Publish Settings** section, you can specify what you can do with the offer. You can choose from the following options:
  - Do not display this offer
  - Set offer display order
  - Enable advanced offer publish settings with start and end dates
6. Optionally enter an **Internal Note** that cannot be seen by TIBCO Reward users.
7. Click **Next: View Summary** to proceed or click **Back** to return to the previous step.

- i Note:** You can request TIBCO representative to add new fields in any of the above offer setup screensto get additional information related to offerAdditional fields can be of type:
- Drop down: Pre-loaded list and you can select a single value
  - Multi-select drop down: Pre-loaded list and you can multiple values
  - Text box: Single line free text input (with maximum 255 characters)
  - Text area: Multiple line free text input (with maximum 255 characters)
  - Image: To upload and image
  - Check boxes: To get an input - Yes/No



**Other Details**

**Additional image**  
optional

Image should be .jpg, .gif, .bmp or .png format and no larger than 1 MB in size.

**Offer type**  
-- Select Offer type --

**Addition Line**  
optional

**Additional Information**  
optional

**Conditions**  
optional

**Accept**  
optional

## What to do next

See [Viewing the Summary](#).

# Viewing the Summary

The Summary step provides an at-a-glance review of the specifics of the offer you created. It also summarizes the progress on the development and usage of the offer.

## Before you begin

See [Finalizing the Display](#).

[HOME](#)
[TARGET](#)
[OFFERS](#)
[MEASURE](#)
[ADMIN](#)

Congratulations! You have successfully created an offer

[< View All Offers](#)

dsafdsfa

Offer Details

fdsfdafds  
 Description  
 fdsfsafdsafdsf  
 Terms & Conditions  
 sdfsfdaifd

Status
 

saved

ID
 11238

Schedule

This offer will be live for 91 more days.
 

Start

27 OCT 2015

End

26 JAN 2016

Performance

|  |                    |          |
|--|--------------------|----------|
|  | Customers Accepted | Not Live |
|  | Customers Awarded  | Not Live |
|  | Total Awards       | Not Live |

[Delete](#)

[Back](#)
[Submit for Approval](#)

1. Setup Offer

Name: dsafdsfa  
 Award: Get bonus  
 Description - 45  
 Best Basket Award - 0

2. Define Criteria

Buy 45 of any product  
 Quality Dates: Oct 27,2015 - Jan 26,2016  
 Include: All baskets  
 Exclude: None

3. Select Target

Customer Target Profile  
 Include: 1 item(s)  
 Exclude: 0 item(s)  
 List  
 Include: 1 item(s)  
 Exclude: 0 item(s)

4. Finalize Display

fdsfdafds  
 fdsfsafdsafdsf  
 sdfsfdaifd

5. Summary

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 TIBCO Reward

## Procedure

1. After you have completed the preceding offer creation steps, the **Offer Status** is **Saved**.
2. Click **Submit for Approval**. After this, the offer goes to the Admin for approval.

The Admin can perform either one of the following actions on the offer:

- Approve: When an offer is approved, it enters the scheduled state, from where it can

TIBCO® Reward User Guide V3

be launched to go live.

- **Deny:** When an offer is denied it enters the denied state.

An email is triggered if the admin approves or denies an offer with the reason for its approval or denial.

## What to do next

A successful offer progresses through the following changes in its status:

### Saved

The offer record has been saved, but work on the offer has not been completed.

### Pending

The offer has been submitted for approval.

### Scheduled

The offer has been approved, and is scheduled to go "live".

### Live

The approved offer is now live. Customers are currently allowed to qualify for this offer. TIBCO Engage automatically ends the offer and changes its status to "completed" at the end of the Offer Qualify end date.

### Completed

The offer is no longer live, and the record is maintained for reference and potential cloning. The time period in which customers were allowed to qualify for this offer has ended.

### Denied

The offer has been denied. The offer can be modified and resubmitted to the administrator for approval.



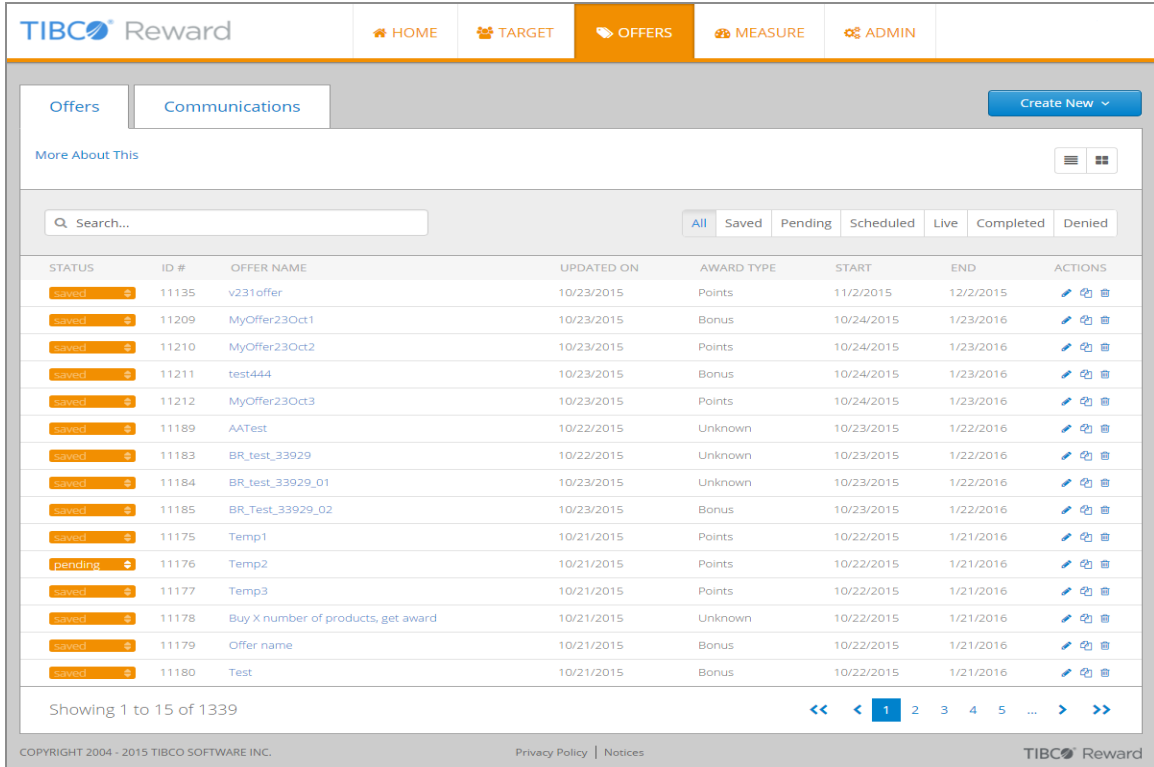
**Note:** If you have administrator permissions, you can update the status of the offer from the summary page, as well as from the list of offers.

## Changing the View of Offer Records

To change the view of offer records, perform the following steps:



### Procedure

1. Click the **Offers** section.
2. Click the **Offers** tab.



The screenshot shows the TIBCO Reward interface. At the top, there's a navigation bar with tabs: HOME, TARGET, OFFERS (selected), MEASURE, and ADMIN. Below this, there's a sub-navigation bar with 'Offers' and 'Communications' tabs, and a 'Create New' button. A search bar is present with the text 'Search...'. Below the search bar, there are filter tabs: All, Saved, Pending, Scheduled, Live, Completed, and Denied. The main content area displays a table of offer records with columns: STATUS, ID #, OFFER NAME, UPDATED ON, AWARD TYPE, START, END, and ACTIONS. The table contains 15 rows of data, including offers like 'v231offer', 'MyOffer23Oct1', 'MyOffer23Oct2', 'test444', 'MyOffer23Oct3', 'AATest', 'BR\_test\_33929', 'BR\_test\_33929\_01', 'BR\_Test\_33929\_02', 'Temp1', 'Temp2', 'Temp3', 'Buy X number of products, get award', 'Offer name', and 'Test'. At the bottom of the table, it says 'Showing 1 to 15 of 1339'. There are also pagination controls and a footer with copyright information and links to Privacy Policy and Notices.

3. Click the following icons:

| Option  | Description                                   |
|---|---|
|  | to view records in list style (default view). |
|  | to view records in thumbnails style.          |

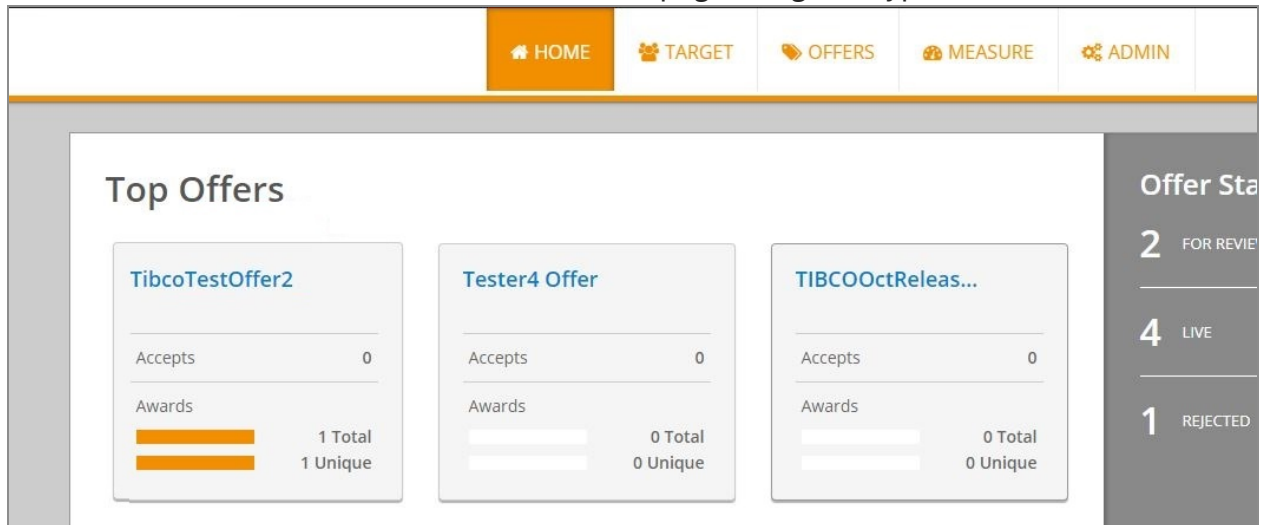
## Searching or Locating Offers

To search or locate offers, perform the following steps:

### Procedure

1. Click the **Offers** section.
2. Click the **Offers** tab.
3. Enter the offer name or ID in the search bar and press the ENTER key.  
If the entered offer name or ID exists, the record is displayed, otherwise the message There are no records to display is displayed.
4. Alternately, use the navigation bars to locate the offers.

**Note:** You can also access the offers from homepage using the hyperlink.



## Filtering Offers

To filter offers, perform the following steps:

### Procedure

1. Click the **Offers** section.
2. Click the **Offers** tab.
3. Click the following options:

| Option    | Description                           |
|-----------|---------------------------------------|
| All       | to view offers of all statuses.       |
| Saved     | to view offers with Saved status.     |
| Pending   | to view offers with Pending status.   |
| Scheduled | to view offers with Scheduled status. |
| Live      | to view offers with Live status.      |
| Completed | to view offers with Completed status. |
| Denied    | to view offers with Denied status.    |

## Editing Offers

To edit offers, perform the following steps:

### Before you begin

See [Creating Offers](#) to know how to create offers.


### Procedure

1. Click the **Offers** section.
2. Click the **Offers** tab.
3. Search or locate the appropriate offer by name or ID and click the offer name to edit the offer. See [Searching or Locating Offers](#) to search and locate offers.
4. Make the necessary modifications to the offer and click **Done**.

## Cloning Offers

To clone offers, perform the following steps:


## Procedure

1. Click the **Offers** section.
2. Click the **Offers** tab.
3. Search or locate the appropriate offer and click the  icon to clone or create a copy of the offer. See [Searching or Locating Offers](#) to search and locate offers.
4. To edit the cloned offer, click the offer name and edit the details. See [Editing Offers](#) to edit the offer.

## Deleting Offers


To delete offers, perform the following steps:

### Procedure

1. Click the **Offers** section.
2. Click the **Offers** tab.
3. Search or locate an appropriate offer and click the  icon to delete the offer. See [Searching or Locating Offers](#) to search and locate offers.

## Importing Offers From a .csv File

Perform the following steps to import offers using a .csv file.

 **Note:** The Import Offer is a configurable feature. Contact the administrator for availing this feature.

### Procedure

1. Select the **Offers** tab on the home screen.

2. Click **Create New**.

The drop down list is visible.

3. Click **Offers from File Import**.

The Import Offers page opens.

4. Drag and drop the .csv file or click **Browse** to add the file to this page.

5. Click **Done**.

This imports the offer(s) from the file to the TIBCO Reward System.

## Communications Overview

A communication is a single email message, including any rich content, and the profiles or lists to which it is addressed.



The purpose of the Communications page is to provide access to all communication records and to help you create and work with communications.

The Communications page lists all communications that have been defined or are in the process of being defined.

## Creating New Communications

To create new communications, perform the following steps:

### Procedure

1. Click the **Offers** section.
2. Click the **Communications** tab.
3. Click the **Create New > Communication** drop-down button.  
The **Edit Communication** page opens.

**TIBCO® Reward** HOME TARGET **OFFERS** MEASURE ADMIN

**Edit Communication** Cancel Done

Enter/Edit communication information below.

**Properties**

Email Internal Name

External ID

Internal Note

**Schedule**

Send email:

☒ Today

☐ On a specific date: 10/23/2015

Time of day to send:

Evaluate and send:

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4. Enter the following values for the Properties panel:
  - **Email Internal Name**
  - **External ID**
  - **Internal Note**
5. Set the following values for the Schedule pane:
  - **Send email:**
  - **Time of day to send:**
  - **Evaluate and send:**
6. Decide the intended target by selecting one of the following options:
  - **No One**

- **Customers issued a Reward Code**
- **Customers eligible for an Offer**
- **Only selected Profiles and/or Lists**
- **All Customers**

7. Click **Done** upon completion.

The **Communications** tab is opened and the newly created communication is displayed in the list of records.

## Searching or Locating Communications

To search or locate communications, perform the following steps:

### Procedure

1. Click the **Offers** section.
2. Click the **Communications** tab.

The screenshot shows the TIBCO Reward interface. The top navigation bar includes HOME, TARGET, OFFERS (selected), MEASURE, and ADMIN. Below this, the 'Communications' tab is active, and a 'Create New' button is visible. A search bar is present above a table of communications. The table has columns for STATUS, ID, COMMUNICATIONS NAME, PUB START, PUB END, OPEN, and ACTIONS. The status column uses color-coded labels: 'saved' (orange), 'pending' (orange), 'completed' (blue), and 'denied' (blue). The table displays 11 records. At the bottom, it shows 'Showing 1 to 11 of 11' and a pagination control with '1' selected.

| STATUS    | ID  | COMMUNICATIONS NAME                      | PUB START  | PUB END    | OPEN | ACTIONS |
|-----------|-----|--|------------|------------|------|---------|
| saved     | 608 | new communication                        | 10/23/2015 | 10/23/2015 | n/a  |         |
| saved     | 607 | testcommunication1001                    | 10/23/2015 | 10/23/2015 | n/a  |         |
| pending   | 595 | new communication                        | 10/23/2015 | 10/23/2015 | n/a  |         |
| pending   | 594 | test1222222 Copy                         | 10/23/2015 | 10/23/2015 | n/a  |         |
| completed | 593 | New Comm Name                            | 07/27/2015 | 07/28/2015 | n/a  |         |
| completed | 592 | 32225issue                               | 07/30/2015 | 07/30/2015 | n/a  |         |
| saved     | 583 | new communication                        | 10/23/2015 | 10/23/2015 | n/a  |         |
| completed | 573 | test1222222                              | 07/30/2015 | 07/30/2015 | n/a  |         |
| completed | 572 | Copy of email communication (Blank HTML) | 05/07/2015 | 05/07/2015 | n/a  |         |
| denied    | 519 | new communication                        | 10/23/2015 | 10/23/2015 | n/a  |         |
| saved     | 511 | new communication                        | 10/23/2015 | 10/23/2015 | n/a  |         |

Showing 1 to 11 of 11

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3. Enter the communication name in the search bar and press ENTER.  
If the entered communication name exists, the record is displayed, otherwise the message There are no records to display is displayed.
4. Alternately, use the navigation bars to locate the communications.

## Editing Communications

To edit the communications, perform the following steps:

### Before you begin

See [Creating New Communications](#) to know how to create communications.


### Procedure

1. Click the **Offers** section.
2. Click the **Communications** tab.
3. Search or locate the appropriate communication and click the communication name to edit the communication. See [Searching or Locating Communications](#) to search and locate communications.  
The **Edit Communication** page is displayed.
4. Make the necessary modifications to the communication and click **Done**.

## Cloning Communications

To clone communications, perform the following steps:

### Procedure


1. Click the **Offers** section.
2. Click the **Communications** tab.
3. Search or locate the appropriate communications and click the  icon to clone or create a copy of the communication. See [Searching or Locating Communications](#) to search and locate communications.

4. To edit the cloned communication, click the communication name and edit the details. See [Editing Communications](#) to edit the communication.

## Deleting Communications

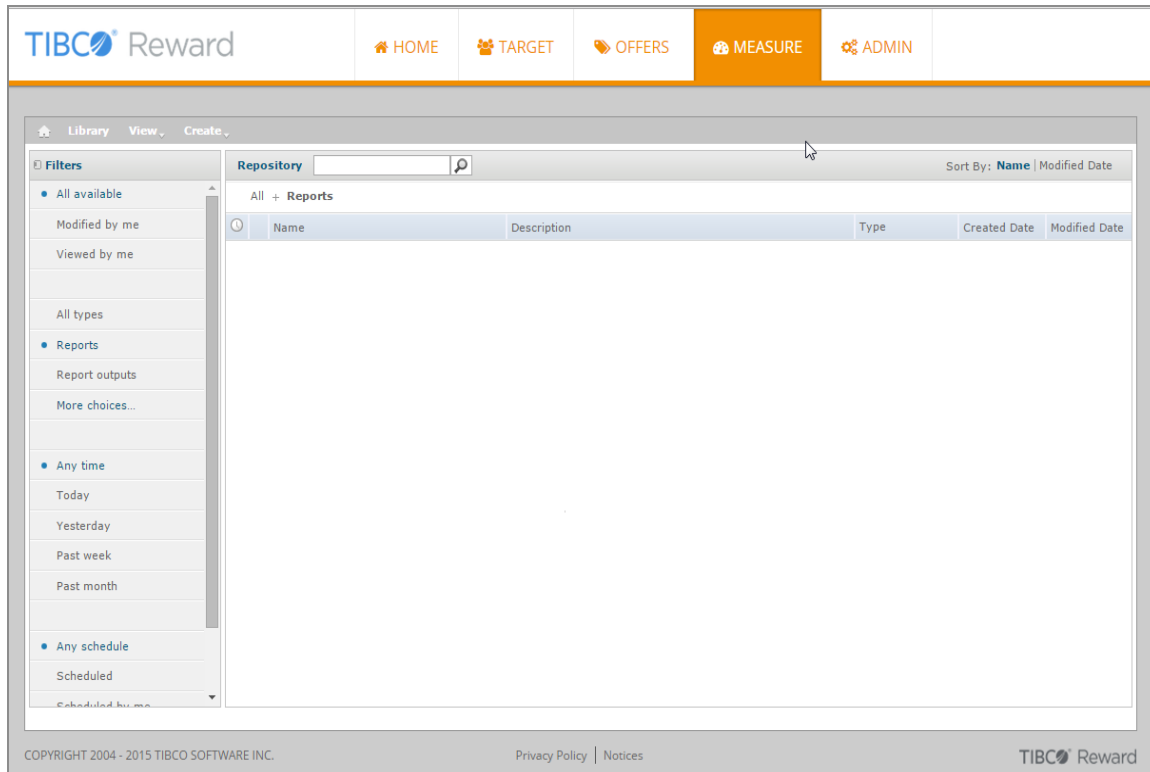
To delete communications, perform the following steps:

### Procedure

1. Click the **Offers** section.
2. Click the **Communications** tab.
3. Search or locate an appropriate communication and click the  icon to delete the communication. See [Searching or Locating Communications](#) to search and locate communications.

# Measure Section

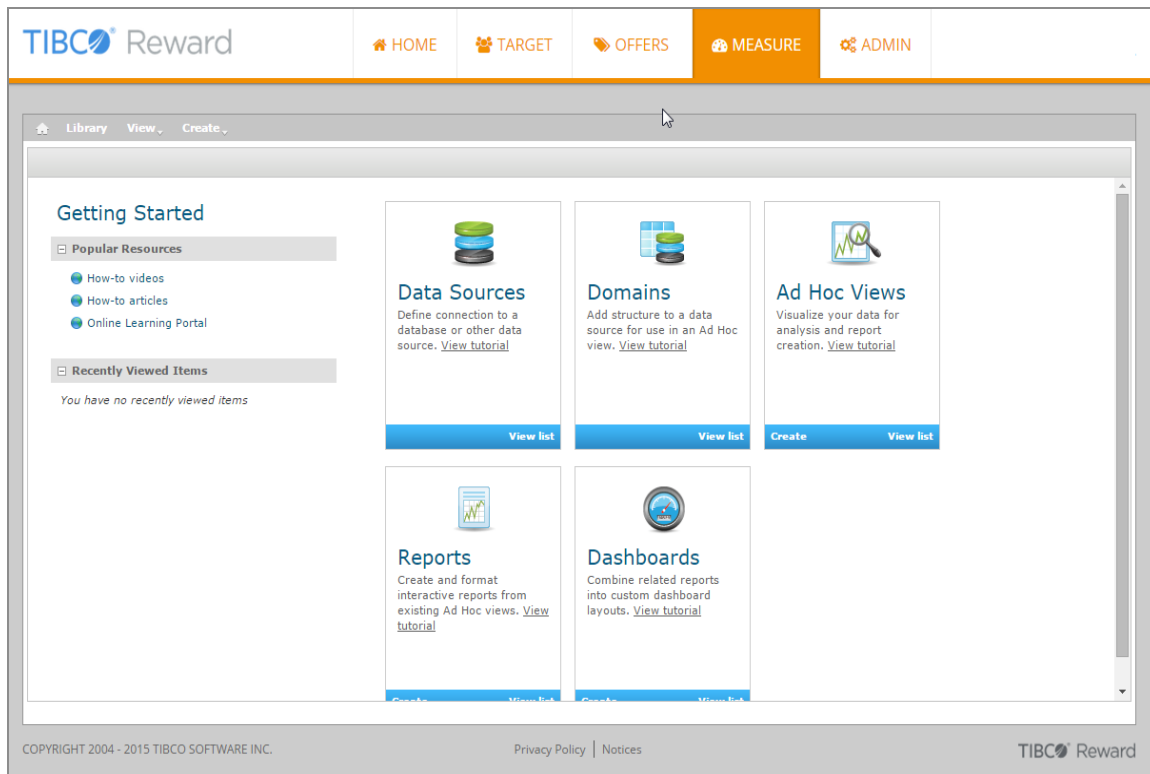
A major benefit of using the TIBCO Engage system is its data analysis and reporting capabilities. This section explains how to create, run, and view reports, which help you spot trends and evaluate the effectiveness of your program.



## Reports Page

Click the **Measure** tab and the **Reporting** page opens. The **Measure** Tab is not shown by default, **Allow ad-hoc reporting** needs to be checked for respective user under **Admin > Users > User Management** to display the **Measure** tab.

The **Getting Started** page for standard users has the following multiple blocks that link to the core work flows of TIBCO Engage Reporting:



- **Ad Hoc Views** : select or create the visualization for your data.
- **Reports** : create an interactive report from an Ad Hoc view, or select an existing report.
- **Dashboards** : combine related reports into one layout, or select from existing layouts.

**Note:** For detailed information about each step in Reporting workflow, click **View Tutorial** in the appropriate workflow block.

The two lists on the left side help you locate and access relevant information and assets.

- **Popular Resources** : includes links to educational and support resources.
- **Recently Viewed Items** : includes links up to 10 recently viewed repository items, such as reports and dashboards.

**i Note:** The Reporting user interface has elements that are configured by TIBCO and not by end users. Some of these onscreen elements include:

- Data Sources
- Domains
- Admin

## Create Report Views

The first step in creating a report is to create a view.

A view is based on a domain, topic, or OLAP client connection. A Report view can be a table, chart, or cross tab and is the entry point to analysis operations such as slice and dice, drill down, and drill through. You can save a Report view as a report, to edit it in the interactive viewer, or add it to a dashboard.

From the **Create** pull-down list, click **Ad-hoc View**. The **Data Chooser** is displayed.

In the **Data Chooser**, the three repository objects, which provide a prepared connection to a data source for Report view creation are the following:

### Topics

Data files created externally and uploaded to the Report Server as a basis for Report views.

### Domains

Virtual views of a data source that present the data in business terms, aid localization, and provide data-level security.

### OLAP Connections

Multi-dimensional views of data using which users can analyze a large number of aggregate data levels. (Note: The OLAP Connection-based Report view is not enabled in this release.)

You can use an existing Report view as a "template" to create a new Report view.



## Creating Topic-Based Report Views

Using a topic as your source generates an empty view, in which you can begin adding data right away, without choosing, prefiltering, or changing display names of the data (all of which are required steps when creating a domain-based view).

### Procedure

1. Launch Report Editor by selecting **Create > Ad Hoc View** on the top toolbar or by clicking **Create** in the **Ad Hoc Views** box.

The **Data Chooser** is displayed.

2. In the **Data Chooser**, select the **Topics** tab at the top of the dialog.

A list of topics is displayed.

3. Expand the desired topics folder and drill down as needed.

4. Select one of the available topics.

5. Select the view type by clicking one of the boxes at the bottom of the screen -- **Table**, **Chart**, **Crosstab** -- or **Cancel**.

This opens the Report view.

6. Set the fields on which to filter in the report, by double-clicking or dragging and dropping the fields into the **New Report View** pane. The report reflects your filtering fields.

7. To save the View:

- a. Click the floppy disk at the top of the Report View page. This opens the **Save As** dialog.

- b. Expand the folders and drill down to the location where you want to save the view.

- c. Click **Save**.

You can now begin working on your topic-based view in the Report Editor.

## Creating Domain-Based Report Views

Administrators create domains that typically filter the data, create input controls, and manage the list of available fields and measures. A domain specifies tables in the database,

join clauses, calculated fields, display names, and default properties, all of which define items and sets of items for creating Report views.

### Procedure

1. Launch the Report Editor by selecting **Create > Ad Hoc View** on the top toolbar or by clicking **Create** in the **Ad Hoc Views** box.

The **Data Chooser** is displayed.

2. In the **Data Chooser**, select the **Domains** tab at the top of the dialog.

A list of domains is displayed.

3. Expand the desired folder and drill down as needed.

4. Select one of the available domains.

5. At the bottom of the dialog, click **Choose Data**.

The **Data Chooser** is displayed.

6. In the Source list, click a Source field by either dragging and dropping the field into the **Selected Fields** text box or by selecting the field and clicking the right arrow.

7. Select the view type by clicking one of the boxes at the bottom of the screen -- **Table**, **Chart**, **Crosstab** — or **Cancel**.

This opens the Report view.

8. To save the view:

- a. Click the floppy disk at the top of the Report View page. This opens the **Save As** dialog.

- b. Expand the folders and drill down to the location where you want to save the view.

- c. Click **Save**.

You can now begin working on your topic-based view in the Report Editor.

## Creating a Report

### Procedure

1. Launch the **Create Report** wizard by selecting **Create > Report** on the top toolbar or

by clicking **Create** in the **Reports** box.

2. Select the report view you want to use as the template for your report by expanding folders and drilling down to your desired report view. (Note: Leave the **Default Report Template** radio button selected.)

3. Click **OK**.

This generates the report.

4. To save the report, perform the following steps:

- a. Click the floppy disk at the top of the Report View page. This opens the **Save As** dialog.
- b. Expand the folders and drill down to the location where you want to save the report.
- c. Click **Save**.

## Running an Existing Report

### Procedure

1. Click **View list** in the **Reports** box.

The search results include your own files and other files that you have permission to view.

2. Click the name of a report in the repository.

The report is displayed.

3. To save the report:

- a. Click the floppy disk at the top of the Report View page. This opens the **Save As** dialog.
- b. Expand the folders and drill down to the location where you want to save the report.
- c. Click **Save**.

# Creating a Report Dashboard

Report dashboards display several reports in a single, integrated view. A dashboard can include other dashboards, input controls for choosing the data displayed in one or more frames, and custom frames that point to URLs for other content. By combining different types of related content, you can create appealing, data-rich dashboards that quickly convey trends.

## Procedure

1. Launch the dashboard designer by selecting **Create > Dashboard** on the top toolbar or by clicking **Create** in the **Dashboards** box.

The dashboard designer displays the list of available content and the canvas.

2. In the **Available Content** panel on the left, expand the appropriate folders and drill down to your desired report.

3. Add content to the dashboard by right-clicking the report and selecting **Add to Dashboard** or by dragging and dropping the report onto the canvas.

The report is displayed in a frame in the upper-left corner of the canvas.

To ensure that a user can view the entire dashboard without scrolling, resize the report to fit within the canvas area. To resize the report, perform the following steps:

- a. Click the report, and then hover the cursor over the handle at the bottom of right-hand edge of the frame containing the report.
- b. When the cursor changes to a resizing icon (<->), click and drag the edge of the frame to resize it.

4. Click **Preview** to see the end user view of the dashboard.

5. Close the Preview window to return to the dashboard designer.

6. To save the dashboard, perform the following steps:

- a. Click **Save > Save Dashboard**.
- b. Expand the folders and drill down to the location where you want to save the view.

7. Click **Save**.

# Admin Section

The Admin section provides access to the customization and administration settings of TIBCO Reward.

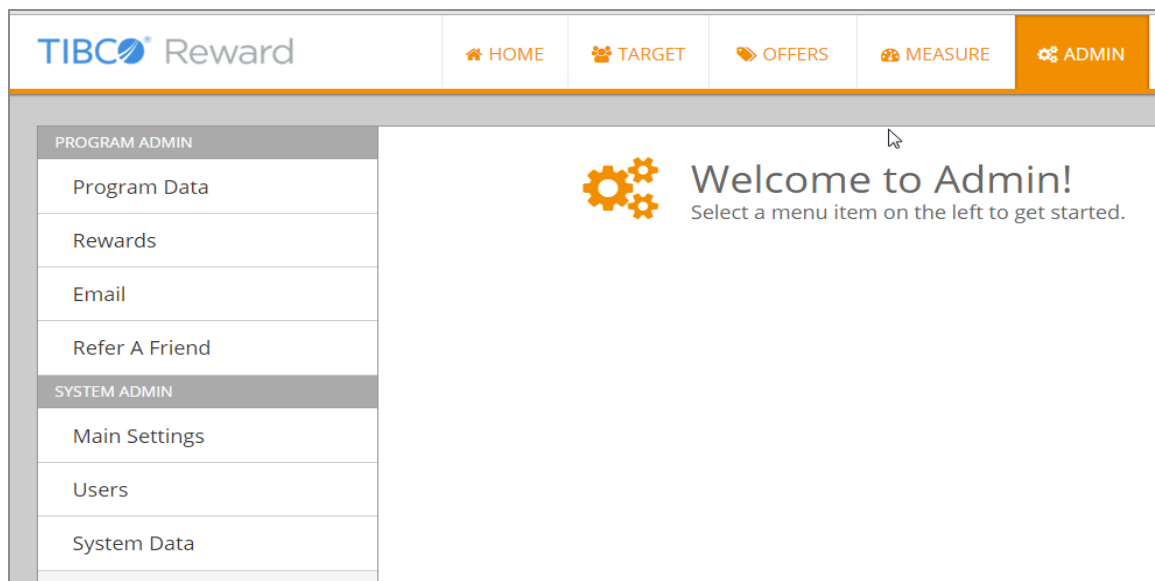
The Admin Section is a menu-based layout where the menus are split into parts:

- **PROGRAM ADMIN**

You can use the menus within **PROGRAM ADMIN** to add values that can be utilized by the features in the other sections.

- **SYSTEM ADMIN**

You can use the menus within **SYSTEM ADMIN** to perform system administration tasks.



## Program Data

## Locations Overview

Marketers can use geolocations to define a customer profile based on proximity to store locations.

The following is a geolocation use case:

A marketer sets up a shopper profile that includes geolocation targeting with a radius of 50 feet around each retail store location. When a customer comes within the defined radius, offers and messages that use the customer profile are instantly delivered to the customer's smartphone. The customer visits the nearby retail location and takes advantage of the offer that was just presented on their GPS-enabled smartphone.

**TIBCO Reward** | [HOME](#) | [TARGET](#) | [OFFERS](#) | [MEASURE](#) | [ADMIN](#)

**PROGRAM ADMIN**

- Program Data
- Locations**
- Post Codes
- Purchase Rules
- Rewards
- Email
- Refer A Friend

**SYSTEM ADMIN**

- Main Settings
- Users
- System Data

**Locations**

Geolocations are used with an integrated mobile application.  
 IMPORTANT: Do not use geolocations if you do not have an integrated mobile application. without...  
[More About This](#)

[Create Location](#)

Q Search...

| STATUS | ID # | NAME        | ADDRESS                          | CITY          | STATE       | ZIP    | COUNTRY | ACTIONS                                     |
|--------|------|-------------|----------------------------------|---------------|-------------|--------|---------|---|
| saved  | 1042 | John        | 2000 walnut ave                  | Fremont       | California  | 94536  | USA     | <a href="#">Edit</a> <a href="#">Delete</a> |
| saved  | 1031 | rt          | 110 mary ave                     | sunnyvale     | ca          | 94086  | usasa   | <a href="#">Edit</a> <a href="#">Delete</a> |
| saved  | 1018 | school      | 15990 NE 85th St                 | redmond       | wa          |        | usa     | <a href="#">Edit</a> <a href="#">Delete</a> |
| saved  | 1045 | SFSLocation | Plot No RL8                      | Pune          | Maharashtra | 411006 | India   | <a href="#">Edit</a> <a href="#">Delete</a> |
| saved  | 1046 | Ted         | Great Falls Road                 | Washington    | Wallace     |        | USA     | <a href="#">Edit</a> <a href="#">Delete</a> |
| saved  | 1040 | Test        | 527 Market St                    | Sacramento    | CA          | 92341  | USA     | <a href="#">Edit</a> <a href="#">Delete</a> |
| in use | 1034 | Tibco       | 575 S. Market St575 S. Market St | San Francisco | CA          | 94103  | USA     | <a href="#">Edit</a> <a href="#">Delete</a> |

Showing 1 to 7 of 7

[<<](#)
[<](#)
[1](#)
[>](#)
[>>](#)

Your use of the TIBCO Reward geolocation mapping functionality is subject to your compliance with the following policies: [Google Terms of Service](#), [Google Maps Terms of Service](#), [Google Maps Legal Notices](#), and [Google Maps Acceptable Use Policy](#) (collectively, the "Google Policies"). If you do not agree to comply with the Google Policies, do not activate or use the TIBCO Reward geolocation mapping functionality. TIBCO may, at its discretion, terminate or suspend your access to or use of the TIBCO Reward mobile mapping functionality if your use fails to comply with the Google Policies.

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## Creating a Geolocation

To create a geolocation perform the following steps:

## Procedure

1. Click **ADMIN** section.
2. Click **Program Data > Locations > Create Location**.
3. Enter the values for the following fields:

- **Name**
- **Address 1**
- **Address 2**
- **City**
- **State/Province**
- **Postal Code**
- **Country**
- **Radius (meters)**

4. Click **Preview**.

A Google map with a beacon, at the entered location, is displayed.

5. Click **Done** to save the new geolocation.

**i Note:** Your use of the TIBCO Reward geolocation mapping functionality is subject to your compliance with the following policies: [Google Terms of Service](#), [Google Maps Terms of Service](#), [Google Maps Legal Notices](#), and [Google Maps Acceptable Use Policy](#) (collectively, the "Google Policies"). If you do not agree to comply with the Google Policies, do not activate or use the TIBCO Reward geolocation mapping functionality. TIBCO may, at its discretion, terminate or suspend your access to or use of the TIBCO Reward geolocation mapping functionality if your use fails to comply with the Google Policies.

## Searching for Geolocations

To search for a geolocation perform the following steps:

## Procedure

1. Click the **ADMIN** section.
2. Click **Program Data > Locations**.
3. Enter the geolocation in the search bar and press Enter.

If the entered geolocation exists the record is displayed, otherwise the message There are no records to display is displayed.


## Editing a Geolocation

To edit a geolocation, perform the following steps:

### Before you begin

See [Creating a Geolocation](#) to know how to create a geolocation.

### Procedure

1. Click the **ADMIN** section.
2. Click **Program Data > Locations**.  
The **Locations** page is displayed.
3. Use the navigation bars, or the search bar, to access a particular geolocation. See [Searching for Geolocations](#) for more details.
4. Click the name of the location or click .  
The **New Location** page is displayed.
5. Make the necessary modifications to the location and click **Done**.


## Deleting a Geolocation

To delete a geolocation, perform the following steps:

### Procedure

1. Click the **ADMIN** section.
2. Click **Program Data > Locations**.  
The **Locations** page is displayed.



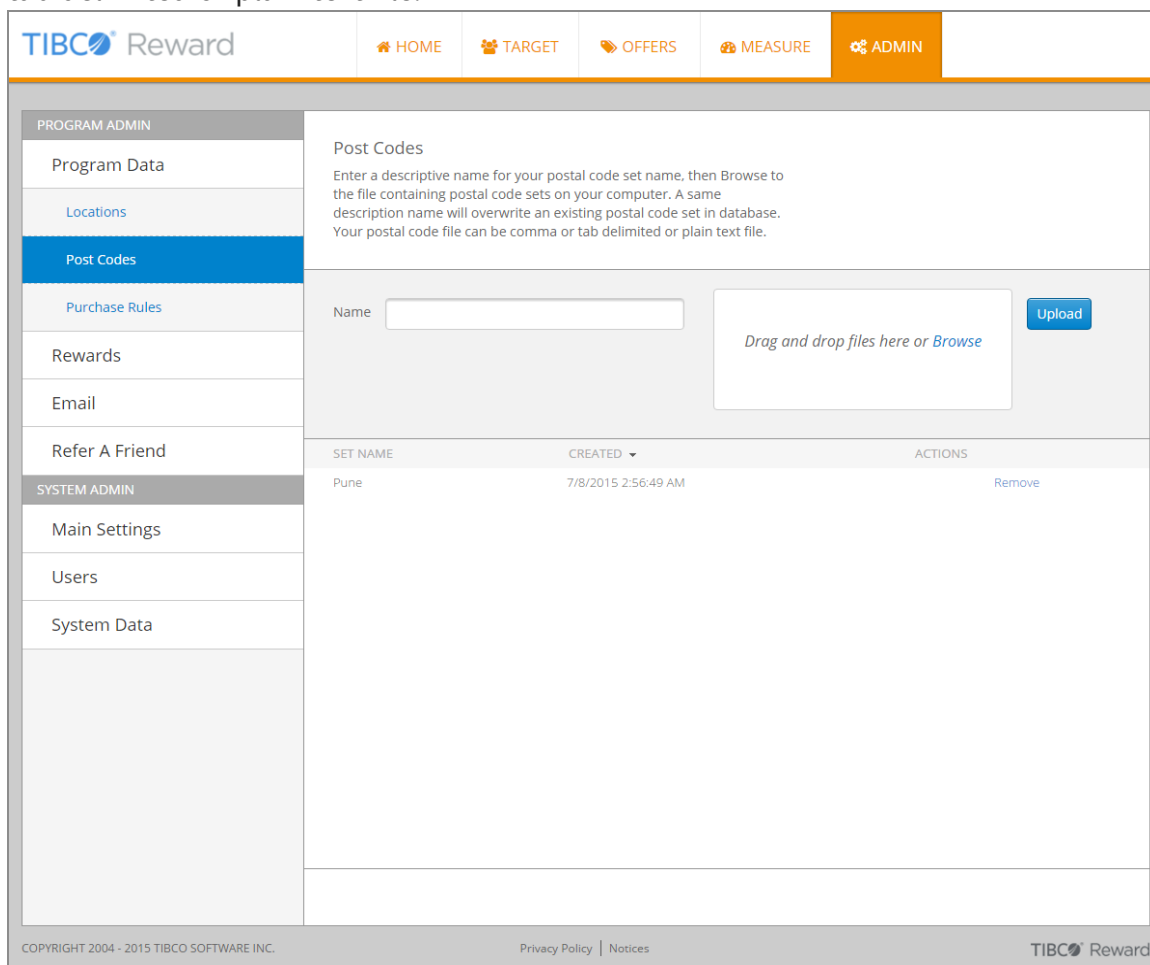
3. Use the navigation bars, or the search bar, to access a particular location. See [Creating a Geolocation](#) for more details.
4. Click  to delete a location.

A dialog box prompts for confirmation. Click **Yes** to delete the location.

## Post Codes Overview

You can use post codes to add postal codes or zip codes to offers, targets, and other features.

You can provide a descriptive name for your postal code set and upload the file containing postal code sets. If a postal code set with the same description is uploaded again, it overwrites the existing postal code set in database. Your postal code file can be comma or tab delimited or plain text file.



The screenshot shows the TIBCO Reward Admin interface. The top navigation bar includes links for HOME, TARGET, OFFERS, MEASURE, and ADMIN. The left sidebar lists various admin sections under PROGRAM ADMIN and SYSTEM ADMIN. The main content area is titled "Post Codes" and contains instructions for creating a new set, a form to enter a name, and an upload area. Below the form is a table listing existing postal code sets.

| SET NAME | CREATED             | ACTIONS                |
|----------|---------------------|------------------------|
| Pune     | 7/8/2015 2:56:49 AM | <a href="#">Remove</a> |

## Adding Post Code Sets

To add post code sets, perform the following steps:

### Procedure

1. Click the **ADMIN** section.
2. Click **Program Data > Post Codes**.  
The **Post Codes** page is displayed.
3. Enter a valid descriptive name for the post code sets in the **Name** field.
4. Drag and drop the post codes file or use the **Browse** link to locate the post codes file from your system.
5. Click **Upload**.
6. The uploaded post codes set is displayed in the record list.

## Deleting Post Code Sets

To delete post code sets, perform the following steps:

### Procedure

1. Click the **ADMIN** section.
2. Click **Program Data > Post Codes**.  
The **Post Codes** page is displayed.
3. Identify the unwanted post code set and click the **Remove** link corresponding to the identified post code set.

## Purchase Rules Overview

Using purchase rules, you can set up specific conditions that a transaction must pass before being evaluated for an offer.

If the predefined purchase rules are satisfied, the purchase is evaluated to determine if it qualifies for an offer. If the purchase rules are not satisfied, the transaction is not evaluated

for offer qualification, even if the purchase would otherwise qualify for an award.

The screenshot displays the TIBCO Reward Admin interface. The top navigation bar includes links for HOME, TARGET, OFFERS, MEASURE, and ADMIN. The left sidebar contains a menu with categories: PROGRAM ADMIN (Program Data, Locations, Post Codes, Purchase Rules, Rewards, Email, Refer A Friend) and SYSTEM ADMIN (Main Settings, Users, System Data). The main content area is titled 'Purchase Rules' and includes a 'Create Purchase Rule' button. Below this is a search bar and a table listing purchase rules. The table has columns for STATUS, ID #, NAME, UPDATED, and ACTIONS. The rules are listed in descending order of ID, with the most recent at the top. The table shows 15 rules, with the first 10 having a status of 'saved' and the last 5 having a status of 'test'.

| STATUS | ID # | NAME                  | UPDATED               | ACTIONS                                     |
|--------|------|-----------------------|-----------------------|---|
| saved  | 1365 | [No Name]             | 10/9/2015 6:11:25 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| saved  | 1364 | [No Name]             | 10/9/2015 6:06:52 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| saved  | 1358 | [No Name]             | 10/8/2015 2:03:36 PM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| saved  | 1356 | [No Name]             | 10/8/2015 1:45:10 PM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| saved  | 1351 | test_Purchase_rules12 | 10/8/2015 1:44:51 PM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| saved  | 1350 | test_r                | 9/28/2015 2:59:55 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| saved  | 1349 | [No Name]             | 9/22/2015 2:10:28 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| saved  | 1348 | [No Name]             | 9/15/2015 11:40:19 AM | <a href="#">Edit</a> <a href="#">Delete</a> |
| saved  | 1347 | [No Name]             | 9/15/2015 9:20:49 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| saved  | 1346 | [No Name]             | 9/15/2015 8:50:24 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| saved  | 1343 | MyPurchase9Sep1       | 9/11/2015 2:13:53 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| saved  | 1344 | MyPurchase9Sep2       | 9/11/2015 2:02:38 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| saved  | 1342 | [No Name]             | 9/9/2015 7:05:00 AM   | <a href="#">Edit</a> <a href="#">Delete</a> |
| saved  | 1341 | testpurchaserulebrand | 9/9/2015 5:51:12 AM   | <a href="#">Edit</a> <a href="#">Delete</a> |
| saved  | 1340 | test_basket_product   | 9/9/2015 5:48:19 AM   | <a href="#">Edit</a> <a href="#">Delete</a> |

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## Store restrictions

You can now target an offer to a dynamic list of stores. Dynamic list of stores can be configured in the Reward system by using store custom attributes while creating basket profiles in the system. Since each basket is associated with a particular store, you can think of a store as a property of basket and can filter the baskets based on the rules.

The existing way of store restrictions is by uploading a static list of stores while creating the offer. So now, you can set store restrictions in two stages. First, by specifying basket profile linked store attributes and second, by specifying a static list of stores. The recommended approach is to not use both the stages in a single offer as it could lead to confusion. If both the stages are used, then the order in which the rules are applied is basket profile eligibility followed by the eligibility of list of stores.

## Setting up Store Restrictions in Purchase Rule

### Procedure

1. Click the ADMIN section.
2. Click **Program Data > Purchase Rules**.  
The **Purchase Rules** page is displayed.
3. Click **Create Purchase Rule**.
4. Enter **Name** and **Internal Notes** for the purchase rule.
5. Click **Add Rule**.  
A pop up with a list of attributes is displayed.
6. Select **Store Attributes**.  
**Evaluate Store Custom Attributes** widget with a drop-down is displayed.
7. Select a store attribute from the drop-down.
8. Select the sub-attribute as per the main attribute selected. You can select multiple sub attributes.
9. Click **Done**.  
The store attribute gets added to the purchase rule . You can similarly attach multiple rules to the purchase rule.
10. Click **Done** to complete defining the purchase rule.

## Enabling Dynamic Store Restrictions while Creating Offer

Store restrictions are enabled during creating the offer. You can target the offer to a dynamically generated store list or a static one using the appropriate options in the workflow.

### Before you begin

Start creating an offer.

### Procedure

1. In **Purchase Restrictions** section, select **Enable Transaction Restrictions**.

2. Click **Add filter** to add the purchase rule restriction.

A modal is displayed with a list of pre-defined purchase rules.

3. Drag and drop the purchase rule to the right section of the modal.
4. Click **Save & Close**.

The purchase rule gets added to the offer.

## Enabling Store Restrictions by Adding a Static list of Stores

Store restrictions are enabled during creating the offer. You can target the offer to a dynamically generated store list or a static one using the appropriate options in the workflow.

### Procedure

1. In **Purchase Restrictions** section, select **Enable Store Restrictions**.
2. Select stores to include or exclude by selecting the appropriate drop-down option.  
A modal is displayed with a list of stores.
3. Drag and drop the stores to the right section of the modal.
4. Click **Save & Close**.

The particular stores for inclusion or exclusion get added to the offer.

## Searching Purchase Rules

To search purchase rules, perform the following steps:

### Procedure

1. Click the **ADMIN** section.
2. Click **Program Data > Purchase Rules**.  
The **Purchase Rules** page is displayed.
3. Enter the purchase rule name in the search bar and press Enter.


If the entered purchase rule name exists the record is displayed, otherwise the message There are no records to display is displayed.

4. Alternately, use the navigation bars to locate the purchase rules.

## Editing Purchase Rules

To edit purchase rules, perform the following steps:


### Procedure

1. Click the **ADMIN** section.
2. Click **Program Data > Purchase Rules**.  
The **Purchase Rules** page is displayed.
3. Search or locate the appropriate purchase rule and click the  icon to edit the purchase rule. See [Searching Purchase Rules](#) to search and locate purchase rules.  
The purchase rule creation page is displayed.
4. Make the necessary modifications to the purchase rule and click **Done**.

## Cloning Purchase Rules

To clone purchase rules, perform the following steps:


### Procedure

1. Click the **ADMIN** section.
2. Click **Program Data > Purchase Rules**.  
The **Purchase Rules** page is displayed.
3. Search or locate the appropriate purchase rule and click the  icon to clone or create a copy of the purchase rule. See [Searching Purchase Rules](#) to search and locate purchase rules.
4. To edit the cloned purchase rule, click the purchase rule name and edit the details.  
See [Editing Purchase Rules](#) to edit the purchase rule.

## Deleting Purchase Rules

To delete purchase rules, perform the following steps:

### Procedure

1. Click the **ADMIN** section.
2. Click **Program Data > Purchase Rules**.  
The **Purchase Rules** page is displayed.
3. Search or locate an appropriate purchase rule and click the  icon to delete the purchase rule. See [Searching Purchase Rules](#) to search and locate purchase rules.

## Rewards

### Reward Codes Overview

You can use reward code functionality to create offers that issue codes as rewards.

The two types of reward codes are the following:

|                     |   |
|---------------------|---|
| Unique Reward Codes | Unique Reward Codes use an inventory of code values, each of which is unique and issued once to a customer. |
|---------------------|---|

Unique code expiration may be static (all codes expire on the same day) or dynamic (code expires X days after Award Date or Offer Start Date)

**Note:** If you are using unique reward codes, you must upload your inventory of code values before you issue them as rewards.

|                         |  |
|-------------------------|--|
| Non-unique Reward Codes | You can use non-unique codes to define a single code value that is issued to multiple customers. A non-unique code is issued an unlimited number of times by default; optionally, you can define a limit by entering a number in the <b>Issue Limit</b> field. |
|-------------------------|--|

---

Non-unique error code expiration, if any, is static.

---

These examples demonstrate the difference between types of reward codes. You can create a non-unique reward code called "FreeShip," which can be used by multiple customers when they earned free shipping vs. using a unique code such as "123456," which is only issued to a single customer.

Reward codes can be distributed to members through outbound communications or the offer showcase.

Reward Codes must be uploaded from a file on your computer. Your list must contain one or more codes, separated by line breaks. Two methods to upload reward codes: browse locally or drag-and-drop.



**Note:** Import Lists must be ASCII text files. Other formats may cause imports to fail.

A sample Reward Code file:

```
090034000001
090034000002
090034000003
090034000004
090034000005
```



To create unique reward codes, perform the following steps:

1. Click the **ADMIN** section.
2. Click **Rewards > Reward Codes**.  
The **Reward Codes** page is displayed.
3. Click **Create New > Unique Reward Code** drop-down button.  
The **Unique Reward Code** page is displayed.
4. Define the following properties for the reward code:

- **Name**
  - **Reference Tag**
  - **Stored Value**
  - **Internal Note**
  - **Expiration**
5. Define the following code inventories:
- **Current Inventory**
  - **Expiration Date**
  - **Code File Upload**
6. Define the following presentation values:
- **Headline**
  - **Displayed Value**
  - **Expires**
  - **URL**
  - **Description**
  - **The Fine Print**
7. Click **Done** to create the unique reward code.
- The **Reward Codes** page is displayed and the created reward code is displayed in the list of records.

## Creating Nonunique Reward Codes

To create non-unique reward codes, perform the following steps:

### Procedure

1. Click the **ADMIN** section.
2. Click **Rewards > Reward Codes**.  
The **Reward Codes** page is displayed.
3. Click **Create New > Non-Unique Reward Code** drop-down button.

The **Non-Unique Reward Code** page is displayed.

4. Define the following properties for the reward code:

- **Name**
- **Reference Tag**
- **Stored Value**
- **Internal Note**
- **Expiration**

5. Define the following code inventories:

- **Current Inventory**
- **Code**
- **Issue Limit**

6. Define the following presentation values:

- **Headline**
- **Displayed Value**
- **Expires**
- **URL**
- **Description**
- **The Fine Print**

7. Click **Done** to create the non-unique reward code.

The **Reward Codes** page is displayed and the created reward code is displayed in the list of records.

## Searching or Locating Reward Codes

To search or locate reward codes, perform the following steps:

### Procedure

1. Click the **ADMIN** section.
2. Click **Rewards > Reward Codes**.

The **Reward Codes** page is displayed.

3. Enter the reward code name in the search bar and press Enter.

If the entered reward code exists, the record is displayed, otherwise the message There are no records to display is displayed.

4. Alternately, use the navigation bars to locate the reward codes.

## Filtering Reward Codes

To filter the list of reward codes, perform the following steps:

### Procedure

1. Click the **ADMIN** section.
2. Click **Rewards > Reward Codes**.

The **Reward Codes** page is displayed.

3. Click the following options to display reward codes:

| Option    | Description                            |
|-----------|--|
| All       | to display all reward codes            |
| Unique    | to display only unique reward codes    |
| Nonunique | to display only nonunique reward codes |

## Editing Reward Codes

To edit reward codes, perform the following steps:


### Before you begin

See [Creating Unique Reward Codes](#) or [Creating Nonunique Reward Codes](#) to know how to create reward codes.

### Procedure

1. Click the **ADMIN** section.
2. Click **Rewards > Reward Codes**.

The **Reward Codes** page is displayed.

3. Search or locate the appropriate reward code and click the  icon to edit the reward code. See [Searching or Locating Reward Codes](#) to search and locate reward codes.

The **Unique Reward Codes** or the **Non-Unique Reward Codes** page is displayed depending on the reward code you are editing.

4. Make the necessary modifications to the reward code and click **Done**.


## Cloning Reward Codes

To clone the reward codes, perform the following steps:

### Procedure

1. Click the **ADMIN** section.
2. Click **Rewards > Reward Codes**.

The **Reward Codes** page is displayed.

3. Search or locate the appropriate reward code and click the  icon to clone or create a copy of the reward code. See [Searching or Locating Reward Codes](#) to search and locate reward codes.
4. To edit the cloned reward codes, click the reward code and edit the details. See [Editing Reward Codes](#) for editing the reward code.


## Deleting Reward Codes

To delete the reward codes, perform the following steps:

### Procedure

1. Click the **ADMIN** section.
2. Click **Rewards > Reward Codes**.

The **Reward Codes** page is displayed.

3. Search or locate an appropriate reward code and click  to delete the reward code. See [Searching or Locating Reward Codes](#) to search and locate reward codes.

## Email

### System Emails Overview

An email communication is a mass mailing that applies email technology. It consists of a single email message and the profiles or lists to which it is addressed.

The single message may include personalization tags and dynamic fields, that is, variations in content that are dynamically selected and inserted into the message, depending on the profile of the recipient. The message may also include rich content, which typically consists of HTML-based page design elements.

**TIBCO® Reward**

HOME TARGET OFFERS MEASURE ADMIN

**PROGRAM ADMIN**

- Program Data
- Rewards
- Email
- System Emails**
- Stationery
- Settings
- Refer A Friend

**SYSTEM ADMIN**

- Main Settings
- Users
- System Data

**System Emails**

Event emails can be enabled and edited below

[More About This](#)

Q Search...

|          | EVENT                              | RESPONSE EMAIL                     | ACTIONS |
|----------|------------------------------------|------------------------------------|---------|
| Disabled | Accepted Offer Expiring            | Accepted Offer Expiring            |         |
| Enabled  | Award Earned                       | Award Earned                       |         |
| Disabled | Award Reversed                     | Award Reversed                     |         |
| Enabled  | Welcome                            | Welcome                            |         |
| Enabled  | Email Address Change Request       | Email Address Change Request       |         |
| Enabled  | External Registration              | External Registration              |         |
| Enabled  | First Reminder                     | First Reminder                     |         |
| Enabled  | Friend Referred                    | Friend Referred                    |         |
| Enabled  | Multiple Awards                    | Multiple Awards                    |         |
| Enabled  | New Offer Available                | New Offer Available                |         |
| Disabled | New Password Request               | New Password Request               |         |
| Enabled  | Partial Registration               | Partial Registration               |         |
| Enabled  | Partial Registration Via Cellphone | Partial Registration Via Cellphone |         |
| Disabled | Registered Card Expired            | Registered Card Expired            |         |
| Disabled | Second Reminder                    | Second Reminder                    |         |

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## Searching or Locating System Emails

To search or locate a system email, perform the following steps:

### Procedure

1. Click the **ADMIN** section.
2. Click **Email > System Emails**.  
The **System Emails** page is displayed.
3. Enter the system email in the search bar and press Enter.  
If the entered system email exists, the record is displayed, otherwise the message There are no records to display is displayed.
4. Alternately, use the navigation bars to locate the system email.

## Enabling or Disabling System Emails

To enable or disable system emails, perform the following steps:

### Procedure


1. Click the **ADMIN** section.
2. Click **Email > System Emails**.  
The **System Emails** page is displayed.
3. Click the list box and select the following:

| List box Value | Description                 |
|----------------|-----------------------------|
| Enabled        | To enable the system email  |
| Disabled       | To disable the system email |

## Previewing System Emails

To preview a system email, perform the following steps:

### Procedure

1. Click the **ADMIN** section.
2. Click **Email > System Emails**.  
The **System Emails** page is displayed.
3. Search or locate the appropriate email. See [Searching or Locating System Emails](#) for more details.
4. Click  to preview the system email.

## Creating New Responses for System Emails

To create new responses for system emails, perform the following steps:



## Procedure

1. Click the **ADMIN** section.
2. Click **Email > System Emails**.  
The **System Emails** page is displayed.
3. Click an appropriate **Event**.  
The **System Emails** page is displayed.
4. Scroll down to **Responses** section and click **Create New**.  
The **Response Email** page is displayed.
5. Provide values for the following fields:
  - **Internal Name**
  - **Subject**
  - **Internal Note**
6. Use the **Generate Text** and **Field Type** drop-down box and click **Generate** to generate the title for the response based on the selected values in the drop-down box.
7. Copy the generated name and use it as the title for the email body. Click **Save** to save changes or click **Done** upon completion.  
Clicking **Done** takes the user to **System Emails** page. Clicking **Save** keeps the user on the **Response Email** page only.
8. The newly created response is visible in the **Responses** pane. Click **Save** to save changes or click **Done** to go back to the **System Emails** page.

## Assigning Stationery for System Email Response


To assign stationery for system email response, perform the following steps:

## Procedure

1. Click the **ADMIN** section.
2. Click **Email > System Emails**.  
The **System Emails** page is displayed.

3. Click an appropriate **Event**.

The **System Emails** page is displayed.

4. Select an appropriate response and select the stationery to be assigned for the response. Click  to see if the stationery has been applied or not.

The preview opens in a pop-up window.

## Previewing Responses of System Emails

To preview responses for system emails, perform the following steps:

### Procedure

1. Click the **ADMIN** section.

2. Click **Email > System Emails**.

The **System Emails** page is displayed.

3. Click an appropriate **Event**.

The **System Emails** page is displayed.

4. Select an appropriate response and click  to preview the response of the system email.

The preview opens in a pop-up window.

## Cloning Responses for System Emails

To clone the responses for system emails, perform the following steps:

### Procedure


1. Click the **ADMIN** section.

2. Click **Email > System Emails**.

The **System Emails** page is displayed.

3. Click an appropriate **Event**.


The **System Emails** page is displayed.

4. Select an appropriate response and click  to clone or create a copy of the selected response of the system email.
5. To edit the cloned response, click the cloned response and edit the details. See [Creating New Responses for System Emails](#) for editing responses for system emails.

## Deleting Responses of System Emails

To delete responses of system emails, perform the following steps:

### Procedure

1. Click the **ADMIN** section.
2. Click **Email > System Emails**.  
The **System Emails** page is displayed.
3. Click an appropriate **Event**.  
The **System Emails** page is displayed.
4. Select an appropriate response and click  to delete the selected response of the system email.

## Stationery Overview

You can use stationery to define common elements (such as a consistent header and footer) that can be wrapped around a given trigger event response email.

You can have as many stationery as you like, but a given response email can only use one stationery at a time. Stationery is helpful if you want to change the email theme for events

or holidays without editing the email content itself.

The screenshot shows the TIBCO Reward Admin interface. The top navigation bar includes links for HOME, TARGET, OFFERS, MEASURE, and ADMIN. The left sidebar contains a menu with PROGRAM ADMIN (Program Data, Rewards, Email, System Emails, Stationery, Settings, Refer A Friend) and SYSTEM ADMIN (Main Settings, Users, System Data). The main content area is titled 'Stationery' and includes a 'New Stationery' button. Below the title is a search bar and a table listing stationery items. The table has columns for STATUS, NAME, UPDATED, and ACTIONS. The table contains 15 rows of data, showing a mix of 'Live' and 'Unassigned' stationery items. The bottom of the page shows pagination information: 'Showing 1 to 15 of 68' and a set of navigation arrows.

| STATUS     | NAME                   | UPDATED               | ACTIONS  |
|------------|------------------------|-----------------------|--|
| Live       | Email Stationery 20    | 12/25/2014 9:39:18 PM | <a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> |
| Live       | Email Stationery 21    | 12/3/2014 6:33:54 PM  | <a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> |
| Live       | Email Stationery 22_01 | 6/26/2015 5:17:08 PM  | <a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> |
| Live       | Email Stationery 23    | 5/20/2015 10:40:19 PM | <a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> |
| Unassigned | Email Stationery 44    | 5/7/2015 2:45:00 AM   | <a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> |
| Unassigned | Email Stationery 55    | 5/7/2015 6:28:54 AM   | <a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> |
| Unassigned | Email Stationery 60    | 5/12/2015 1:53:23 PM  | <a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> |
| Unassigned | Email Stationery 61    | 5/7/2015 6:41:49 AM   | <a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> |
| Unassigned | Email Stationery 62    | 5/14/2015 8:48:11 PM  | <a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> |
| Unassigned | Email Stationery 63    | 5/7/2015 6:21:10 PM   | <a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> |
| Unassigned | Email Stationery 64    | 5/7/2015 6:22:09 PM   | <a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> |
| Unassigned | Email Stationery 65    | 5/11/2015 3:08:47 PM  | <a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> |
| Assigned   | Email Stationery 66    | 5/11/2015 5:15:30 PM  | <a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> |
| Unassigned | Email Stationery 67    | 5/11/2015 5:45:04 PM  | <a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> |
| Unassigned | Email Stationery 68    | 5/26/2015 4:10:01 PM  | <a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> |

Showing 1 to 15 of 68

## Creating New Stationery

To create new stationery, perform the following steps:

### Procedure

1. Click the **ADMIN** section.
2. Click **Email > Stationery**.  
The **Stationery** page is displayed.
3. Click **New Stationery** button.  
The **Edit Stationery** page is displayed.
4. Provide values for the following fields:

- **Internal Name**
  - **Internal Note**
5. Use the **Generate Text** and **Field Type** drop-down box and click **Generate** to generate the title for the stationery based on the selected values in the drop-down box.
  6. Copy the generated name and use it as the title for the email body. Click **Save** to save changes or click **Done** upon completion.  
Clicking **Done** takes the user to the **Stationery** page.
  7. The newly created stationery is visible in the list of records.

## Searching or Locating Stationery

To search or locate stationery, perform the following steps:

### Procedure


1. Click the **ADMIN** section.
2. Click **Email > Stationery**.  
The **Stationery** page is displayed.
3. Enter the stationery name in the search bar and press Enter.  
If the entered stationery name exists the record is displayed, otherwise the message There are no records to display is displayed.
4. Alternately, use the navigation bars to locate the stationery.

## Previewing the Stationery

To preview the stationery, perform the following steps:

### Procedure

1. Click the **ADMIN** section.
2. Click **Email > Stationery**.  
The **Stationery** page is displayed.

3. Search or locate an appropriate stationery and click  to preview the stationery. See [Searching or Locating Stationery](#) to search and locate stationery.

The preview opens in a pop-up window.


## Cloning the Stationery

To clone the stationery, perform the following steps:

### Procedure

1. Click the **ADMIN** section.
2. Click **Email > Stationery**.

The **Stationery** page is displayed.

3. Search or locate the appropriate stationery and click  to clone or create a copy of the stationery. See [Searching or Locating Stationery](#) to search and locate stationery.
4. To edit the cloned stationery, click the stationery and edit the details. See [Creating New Stationery](#) for editing the stationery.


## Deleting the Stationery

To delete the stationery, perform the following steps:

### Procedure

1. Click the **ADMIN** section.
2. Click **Email > Stationery**.

The **Stationery** page is displayed.

3. Search or locate an appropriate stationery and click  to delete the stationery. See [Searching or Locating Stationery](#) to search and locate stationery.

## Settings Overview

You can use email settings to customize the email details such as the following:

- The sender email address
- The name of the sender
- The email address for reply

The screenshot displays the TIBCO Reward Admin interface. At the top, there is a navigation bar with the TIBCO Reward logo and several menu items: HOME, TARGET, OFFERS, MEASURE, and ADMIN (which is highlighted in orange). Below the navigation bar, the interface is divided into two main sections. On the left is a sidebar menu with categories: PROGRAM ADMIN (containing Program Data, Rewards, Email, System Emails, Stationery, and Settings) and SYSTEM ADMIN (containing Main Settings, Users, and System Data). The 'Settings' option under PROGRAM ADMIN is highlighted in blue. The main content area on the right is titled 'Settings' and includes the instruction 'Edit email settings below'. It contains three input fields: 'From' Email Address (with the value 'asdfsafdsadasds@tibco.com'), 'From' Name (with the value 'sadsadfsa\_skdjflkdsj@%45365`4734`7'), and 'Reply' Email Address (with the value 'adsfdfsafd@tibco.com'). A 'Save Changes' button is located at the bottom right of the settings area. At the bottom of the page, there is a footer with copyright information (COPYRIGHT 2004 - 2015 TIBCO SOFTWARE INC.), links to Privacy Policy and Notices, and the TIBCO Reward logo.

## Customizing Email Settings

To customize email settings, perform the following steps:

### Procedure

1. Click the **ADMIN** section.
2. Click **Email > Settings**.  
The **Settings** page is displayed.
3. Edit or Customize the following fields:

- **"From" Email Address**
- **"From" Name**
- **"Reply" Email Address**

4. Click **Save Changes** to save the modifications.

## Refer a Friend

### Refer a Friend Settings

Refer a friend functions like an offer that gives customers points (or some type of award) for providing referrals to your program.



TIBCO® Reward

HOME

TARGET

OFFERS

MEASURE

ADMIN

PROGRAM ADMIN

Program Data

Rewards

Email

Refer A Friend

Refer A Friend Settings

SYSTEM ADMIN

Main Settings

Users

System Data

Refer A Friend

The External Program Name is visible to your customers as the title of your Refer A Friend program, which appears as a component on their My Account pages.

[More About This](#)

Enablement

☒ Enable Refer A Friend

Configuration

External Name:

refer\_123

Description:

Test Refer Friend

How It Works:

Test Refer Friend

Terms & Cond:

Test Refer Friend

Awards & Limits:

☒ Referrer gets 5 point(s) for every 1 email address(es) entered

☒ Referrer gets 1 point(s) for every 1 referred signup(s)

☒ Referrer gets 3 point(s) for every 2 referred's first transaction(s)


☒ Limit referrer to 10 total referrals

Image:

Drag and drop files here or [Browse](#)

This graphic will appear on your customer's Account pages.

Valid file formats: JPG, PNG, BMP, GIF. GIF image quality may vary. File size must be less than 1MB.



Remove Image

# Referring a Friend

To refer a friend, perform the following steps:

## Procedure

TIBCO® Reward User Guide V3

1. Click the **ADMIN** section.
2. Click **Refer a Friend > Refer a Friend Settings**.  
The **Refer a Friend** page is displayed.
3. Select the **Enable Refer A Friend** check box.
4. Enter the following values:
  - **External Name:** the title of your **Refer A Friend** program.
  - **Description:** description to prompt your customers to refer their friends.
  - **How It Works:** describe what your customers earn if they refer friends.
  - **Terms & Cond:** describe any rules or legal information about the program.
5. Select the necessary **Awards & Limits:** select options and provide relevant values in each options.
6. You can drag and drop or click the **Browse** link to locate an appropriate image for the **Refer a Friend** feature. The valid file formats are JPG, PNG, BMP, and GIF. The image file size should not exceed 1 MB.
7. Click **Done** to set up the **Refer A Friend** feature.

## Main Settings

### Account Lockout Rules Overview

Account lockout rules provide protection against unauthorized account access by locking out accounts when incorrect passwords are used.

You can configure if and when accounts are locked out, how long accounts are locked out, and the message that is displayed when an account is locked out.

The screenshot displays the TIBCO Reward Admin interface. The top navigation bar includes links for HOME, TARGET, OFFERS, MEASURE, and ADMIN. The left sidebar lists various admin sections under PROGRAM ADMIN and SYSTEM ADMIN. The main content area is titled "Account Lockout Rules" and contains the following configuration options:

- Lockout Threshold:** A dropdown menu set to "5 failed logins".
- Lockout Observation Window:** A dropdown menu set to "4 hours".
- Lockout Duration:** Radio buttons for "Lockout an account for" (selected) and "Until manually unlocked". The "Lockout an account for" option has a dropdown set to "24 hours".
- Business User Account Lockout Message:** A text area containing the message: "This is a test. Oops! Your account is locked. Please contact an administrator. Please try after 1 hour..".
- Customer Account Lockout Message:** A text area containing the message: "This is a test. Oops! Your account is locked. Please contact customer support."

At the bottom of the page, there is a footer with copyright information, privacy policy, and notices, along with the TIBCO Reward logo.

## Setting Account Lockout Rules

To set account lockout rules, perform the following steps:

### Procedure

1. Click the **ADMIN** section.
2. Click **Main Settings > Account Lockout Rules**.

The **Account Lockout Rules** page is displayed.

3. Set appropriate values for the following fields:
  - **Lockout Threshold**
  - **Lockout Observation Window**
  - **Lockout Duration**
4. Enter appropriate values for the following fields:
  - **Business User Account Lockout Message: (CRMS & Reporting Users)**
  - **Customer Account Lockout Message: (Microsite & Mobile Microsite Users)**
5. Click **Done** upon completion. The account lockout rules, that were set, are saved.

## List Import Settings Overview

**TIBCO® Reward**

HOME TARGET OFFERS MEASURE ADMIN

**PROGRAM ADMIN**

- Program Data
- Rewards
- Email
- Refer A Friend

**SYSTEM ADMIN**

- Main Settings
- Account Lockout Rules
- List Import Settings**
- Points Rules
- Points Management
- Users
- System Data

**List Import Settings**

List Import Settings control what happens when you create a list from a file import at the Target page. [More About This](#)

Cancel Done

**Settings**

Updates: Existing records will **Be updated via import**

**WARNING:** This setting will allow customer data to be overwritten when an imported record's email address matches one already in the Loyalty Lab system. Once changed, the old data cannot be recovered. IT IS STRONGLY RECOMMENDED THAT YOU DO NOT USE THIS SETTING. Please contact Client Services for more information.

Import As: New records are imported as **Registered customers**

**WARNING:** During a List import, all new records will be created as registered members. These new members will be treated immediately as such, including the sending of any enabled Welcome trigger emails. No existing customer records will be affected. Please exercise care when using this setting.

Email Opt-In: New records are added as **Email opt-in**

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List import settings control what happens when you create a list from a file import at the **Target** page.

The following options are set in the list import settings:

## Updates

When updates are enabled, creating a list from a file import can be used to update the **Email Opt-In** value for existing customers.

## Import As

When you import customers in a list, they can be added to your customer database as unregistered customer or as registered members.

- If importing as unregistered customers, all new email addresses are added as unregistered customers.
- If importing as registered customers, all new email addresses are added as registered members.

## Email Opt-in

List email addresses can either be imported as opted-in to receiving email, or opted out.

**i Note:** You are asked to confirm the "opt-in" status every time you import a list with this setting set to "opted-in". Importing or updating email addresses that have not provided express and verifiable permission could cause your company to violate the CAN-SPAM Act.

## Modifying List Import Settings

To modify list import settings, perform the following steps:

### Procedure

1. Click the **ADMIN** section.
2. Click **Main Settings > List Import Settings**.  
The **List Import Settings** page is displayed.
3. Set appropriate values for the following fields:
  - **Updates: Existing records will**

- **Import As:** New records are imported as
  - **Email Opt-In:** New records are added as
4. Click **Done** upon completion. The list import settings, that were set, are saved.

## Points Rules Overview

You can use point vesting to define an amount of time between when a member earns a point award, and when those points become available to them for use.

For point vesting, you must enter the number of days the member must wait until earned points are available. The number of days can be between 0 and 365 days.

**i Note:** You cannot use point vesting if you are using auto-conversion; point vesting is available only to clients using Reward Catalog. If point vesting is disabled after having been enabled, all pending points immediately vest for all members. Customers can only use points that are available to them. When point vesting is enabled, customer service representatives can view pending point values per customer on the **Customer Details** screen. Pending points, and point balance, may be displayed in the member's Account Summary area of their hosted microsite statement if implemented as such during the onboarding process. This information may also be displayed on the **Rewards Catalog** page. You can also choose to display pending points to your customers within email communications or in Web Signage through the use of the **Points Pending** and **Points Balance** fields.

The screenshot shows the TIBCO Reward Admin interface. The top navigation bar includes links for HOME, TARGET, OFFERS, MEASURE, and ADMIN (which is highlighted). The left sidebar contains a menu with categories: PROGRAM ADMIN (Program Data, Rewards, Email, Refer A Friend) and SYSTEM ADMIN (Main Settings, Account Lockout Rules, List Import Settings, Points Rules, Points Management, Users, System Data). The 'Points Rules' option is selected and highlighted in blue. The main content area is titled 'Points Rules' and contains two configuration sections: 'Point Vesting Configuration' and 'Point Reset Configuration'. The 'Point Vesting Configuration' section has a checkbox for 'Enable Point Vesting' which is checked, followed by a text field set to '0' days after award event. The 'Point Reset Configuration' section has a checkbox for 'When customer is deactivated or un-enrolled, set their point balance to 0' which is also checked. 'Cancel' and 'Done' buttons are located in the top right corner of the main content area.

## Setting Points Rules

To set points rules, perform the following steps:

### Procedure

1. Click the **ADMIN** section.
2. Click **Main Settings > Points Rules**.  
The **Points Rules** page is displayed.
3. Set appropriate values for the following fields:
  - **Point Vesting Configuration**
  - **Point Reset Configuration**
4. Click **Done** upon completion. The points rules, that were set, are saved.

## Points Management Overview

You can use the points management feature to manage the point types and point groups.

With the points management feature you can create:

- Points Groups
- Point Types

## Creating Point Groups

To create point groups, perform the following steps:

### Procedure

1. Click the **ADMIN** section.
2. Click **Main Settings > Points Management**.  
The **Points Management** page is displayed.
3. Click **Create New > Point Group**.  
The **New Point Group** page is displayed.
4. Enter values for the following fields:
  - **Point Group Name**
  - **Reference Tag**
  - **Internal Note**
5. Click **Done** upon completion.  
The **Points Management** page opens and the newly created point group is displayed in the list of records.

## Creating Point Types

To create point types, perform the following steps:

### Procedure



1. Click the **ADMIN** section.
2. Click **Main Settings > Points Management**.  
The **Points Management** page is displayed.
3. Click **Create New > Point Type**.  
The **New Point Type** page is displayed.
4. Enter values for the following fields of point type properties:
  - **Point Type Name**
  - **Internal Note**
5. In the point group properties, select a point group for the field **Points awarded by this Point Type accrue in**.
6. Enter values for the following fields of point group properties:
  - **Point Group Name**
  - **Reference Tag**
  - **Internal Note**
7. Click **Done** upon completion.  
The **Points Management** page opens and the newly created point type/point group is displayed in the list of records.

## Searching Point Groups

To search point groups, perform the following steps:

### Procedure

1. Click the **ADMIN** section.
2. Click **Main Settings > Points Management**.  
The **Points Management** page is displayed.
3. Enter the point group name in the search bar and press Enter.  
If the entered point group exists, the record is displayed, otherwise the message There are no records to display is displayed.

## Searching Point Types

To search point types, perform the following steps:


### Procedure

1. Click the **ADMIN** section.
2. Click **Main Settings > Points Management**.  
The **Points Management** page is displayed.
3. Enter the point type name in the search bar and press Enter.  
If the entered point type exists the record is displayed, otherwise the message There are no records to display is displayed.

## Deleting Point Groups

To delete point groups, perform the following steps:

### Procedure


1. Click the **ADMIN** section.
2. Click **Main Settings > Points Management**.  
The **Points Management** page is displayed.
3. Search an appropriate point group and click  to delete the point group. See [Searching Point Groups](#) to search point groups.

## Deleting Point Types

To delete point types, perform the following steps:

### Procedure

1. Click the **ADMIN** section.
2. Click **Main Settings > Points Management**.  
The **Points Management** page is displayed.

3. Search an appropriate point type and click  to delete the point type. See [Searching Point Types](#) to search point types.


# Users

## User Management Overview

The first step to getting started using TIBCO Reward platform is to create users.

The two ways to create users in TIBCO Reward are:

- [Creating New Users](#)
- [Creating New Users Through File Import](#)

 **Note:** Only administrators can add users to the TIBCO Reward. See [TIBCO Reward](#) for more details.

**TIBCO Reward**

HOME TARGET OFFERS MEASURE ADMIN

**PROGRAM ADMIN**

- Program Data
- Rewards
- Email
- Refer A Friend

**SYSTEM ADMIN**

- Main Settings
- Users
- User Management**
- System Data

**User Management**

Create, edit, and delete users. Reset passwords and send account access information

Create New

Q Search...

| FIRST NAME | LAST NAME  | LOGIN EMAIL       | USER TYPE                 | LAST LOGIN | STATUS      | ACTIONS                                     |
|------------|------------|-------------------|---------------------------|------------|-------------|---|
| 33Test     | 33Test     | icsadmin@test...  | Clienteling User          |            | In Progress | <a href="#">Edit</a> <a href="#">Delete</a> |
| 87689795   | 5675766    | dfgf1dg@dsd.c...  | Administrator             | 01/01/1900 | Active      | <a href="#">Edit</a> <a href="#">Delete</a> |
| 7676876    | 5767       | rt1ret@trt.com    | Clienteling User          | 01/01/1900 | Active      | <a href="#">Edit</a> <a href="#">Delete</a> |
| 6          | 6          | test6@test6.com   | Category Manager          | 03/13/2014 | Active      | <a href="#">Edit</a> <a href="#">Delete</a> |
| gngfthvff6 | 64365435   | trytry@uy343tu... |                           | 01/01/1900 | Active      | <a href="#">Edit</a> <a href="#">Delete</a> |
| 3223       | 6456456    | ewrewr@fdsf.c...  | API User                  | 01/01/1900 | Active      | <a href="#">Edit</a> <a href="#">Delete</a> |
| 655        | 6556       | tuytu@oiuro.co... | API User                  | 01/01/1900 | Active      | <a href="#">Edit</a> <a href="#">Delete</a> |
| 565fd3     | 6565gff    | rt1rt@ruy34tu...  | Administrator (read only) | 01/01/1900 | Active      | <a href="#">Edit</a> <a href="#">Delete</a> |
| 768798     | 65765765   | fd1gfdg@gfgfd...  | Category Manager          | 01/01/1900 | Active      | <a href="#">Edit</a> <a href="#">Delete</a> |
| 56756      | 6586       | trytry@uytu.com   | API User                  | 01/01/1900 | Active      | <a href="#">Edit</a> <a href="#">Delete</a> |
| 78768      | 658768     | tyutu@uytu.com    | API User                  | 01/01/1900 | Active      | <a href="#">Edit</a> <a href="#">Delete</a> |
| 98989test  | 658768test | rt1rt@ruytu.com   | CSR Admin                 | 01/01/1900 | Active      | <a href="#">Edit</a> <a href="#">Delete</a> |
| tyty       | 65tyty     | tytry@hf23hg.c... |                           | 01/01/1900 | Active      | <a href="#">Edit</a> <a href="#">Delete</a> |
| 56757      | 67         | rtret@trrt.com    | Clienteling User          | 01/01/1900 | Active      | <a href="#">Edit</a> <a href="#">Delete</a> |
| jhgjhjh    | 67676u     | gfg1@fdg34fdg...  | Store Manager             | 01/01/1900 | Active      | <a href="#">Edit</a> <a href="#">Delete</a> |

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## TIBCO Reward User Roles and Privileges

The list of TIBCO Reward users and their privileges are as follows:

| User Role      | Privileges   |
|----------------|--|
| Administrators | Administrators have "Super User" privileges. They can create users and assign privileges. They are also authorized to create, publish, approve, and schedule offers. |
| Publishers     | Publishers have the following permissions: <ul style="list-style-type: none"> <li>Schedule an offer</li> </ul>   |

| User Role                | Privileges  |
|--------------------------|---|
|                          | <ul style="list-style-type: none"> <li>• Approve an offer that has not been created by the merchant manager, publisher, or admin</li> <li>• Deny an offer that has not been created by the merchant manager, publisher, or admin</li> <li>• Launch any approved offer</li> </ul> <p>Publishers do not have the following permissions:</p> <ul style="list-style-type: none"> <li>• Create an user</li> <li>• Edit or complete a live offer</li> </ul> |
| Category Managers        | The category managers can create offers in their product category, for any store, but the offers must be approved by an administrator or publisher. (Contact TIBCO Engage's client services before attempting to assign this role to a user).   |
| Store Managers           | Store managers can create offers for their store, but an administrator or publisher must approve the offers. (Contact TIBCO Engage's client services before attempting to assign this role to a TIBCO Engage user).   |
| CSR Admins               | CSR admins have access to all of the Customer Management Tool and the ability to create Customer Management Tool users.   |
| CSR Users                | CSR users only have access to limited features of the Customer Management Tool. Customer Management Tool users do not have access to sensitive customer information, nor can they perform certain operations on customers, such as merging accounts or transferring points.   |
| Clienteling Users        | Clienteling users can access the Clienteling user interface, which is used to look up and/or enroll customers in the customer engagement program. Clienteling users do not have access to Engage or CSR.  |
| REST API Users           | REST API users are specialists who exchange information with the system through REST APIs.  |
| Read Only Administrators | Read Only Administrators are system administrators that only have read permissions.   |

| User Role         | Privileges   |
|-------------------|--|
| Merchant Managers | The merchant managers can create offers for their business only. An administrator or publisher must approve the offers before publishing them. The merchant managers are only able to view or edit the offers that they have created and not those of other merchant managers. |

## Creating New Users

To create new users, perform the following steps:

### Procedure

1. Click **ADMIN** section.
2. Click **Users > User Management**.  
The **User Management** page is displayed.
3. Click the **Create New > User** drop-down button.  
The **Create/Update User Info** page is displayed.
4. Enter the values for the following fields:
  - **User Type**
  - **First Name**
  - **Last Name**
  - **Email Address**
  - **Password**
  - **Re-enter Password**
5. If required, select the following fields:
  - **Send account access information to the user**
  - **Allow ad-hoc reporting**
6. Click **Done**.

The **User Management** page opens and the created user is displayed in the list of records.

## Creating New Users Through File Import

To create new users through file import, perform the following steps:

### Procedure

1. Click **ADMIN** section.
2. Click **Users > User Management**.  
The **User Management** page is displayed.
3. Click the **Create New > Users via File Import** drop-down button.  
The **Import Users** page is displayed.
4. Drag and drop the text file containing the user data or click **Browse** to locate the file from your system.
5. The Text File(.csv) fields are **LastName, FirstName, EmailAddress, Password, UserRole, Status, StoreIds, Category, MerchantName**.
6. **LastName, FirstName, EmailAddress, Password, UserRole, Status** are mandatory fields.
7. **MerchantName** field is mandatory for **MerchantManager** Role only
8. Select the check box **send account information to activated users** if required.
9. Click **Done**.  
The **User Management** page opens and the created users are displayed in the list of records.

## Searching or Locating Users

To search or locate users, perform the following steps:

### Procedure

1. Click **ADMIN** section.
2. Click **Users > User Management**.  
The **User Management** page is displayed.
3. Enter the user name in the search bar and press Enter.

If the entered user name exists, the record is displayed, otherwise the message There are no records to display is displayed.

4. Alternately, use the navigation bars to locate the user name.


## Editing User Details

To edit user details, perform the following steps:

### Before you begin

See [Creating New Users](#) and [Creating New Users Through File Import](#) to know how to create users.


### Procedure

1. Click **ADMIN** section.
2. Click **Users > User Management**.  
The **User Management** page is displayed.
3. Search or locate the user name and click  to edit user details. See [Searching or Locating Users](#) to search and locate users.  
The **Create/Update User Info** page is displayed.
4. Make the necessary modifications to the user details and click **Done**.

## Deleting Users

To delete users, perform the following steps:

### Procedure

1. Click **ADMIN** section.
2. Click **Users > User Management**.  
The **User Management** page is displayed.
3. Search or locate the user name and click  to delete the user. See [Searching or Locating Users](#) to search and locate users.



# System Data

## Attributes Overview

Attributes store client-defined information that can be used for targeting or segmentation.

For example, you can create an attribute to denote the color of a product. Then you can create an offer targeted at customers who meet the criterion of having the attribute value for a specific product color.

TIBCO® Reward

HOME

TARGET

OFFERS

MEASURE

ADMIN

PROGRAM ADMIN

Program Data

Rewards

Email

Refer A Friend

SYSTEM ADMIN

Main Settings

Users

System Data

Attributes

Entities

Events

Attributes

Create New

Custom attributes can be used in creating offers and defining user profiles.

[More About This](#)

Search...

Show

All Categories

All Types

| ID # | NAME               | CATEGORY         | TYPE     | REFERENCE TAG      | UPDATED              | ACTIONS                                     |
|------|--------------------|------------------|----------|--------------------|----------------------|---|
| 2799 | test limit         | Products         | Lookup   | test limit         | 9/30/2015 4:11:51 PM | <a href="#">Edit</a> <a href="#">Delete</a> |
| 2794 | Temp               | Offer Categories | Lookup   | Tempo              | 8/7/2015 5:00:05 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| 2797 | rewardlookup       | Reward Items     | Lookup   | rewardlookup       | 8/7/2015 4:46:24 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| 2798 | test1234           | Redemptions      | DateTime | test1234           | 8/7/2015 4:41:51 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| 2796 | sampleAttribute    | Reward Items     | MonthDay | sample             | 8/7/2015 4:39:26 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| 2795 | csv test           | Products         | Lookup   | csv                | 8/6/2015 2:43:08 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| 2793 | a123               | Offer Categories | Lookup   | a123               | 8/4/2015 5:12:17 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| 2789 | store lookup       | Stores           | Lookup   | store lookup       | 8/4/2015 5:07:15 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| 2790 | lookup redemption  | Redemptions      | Lookup   | redemption lookup  | 8/4/2015 5:03:19 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| 2788 | product Season     | Products         | Lookup   | product Season     | 8/4/2015 4:58:27 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| 2792 | lookup season      | Products         | Lookup   | season lookup      | 8/4/2015 4:51:55 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| 2791 | lookup redemption1 | Redemptions      | Lookup   | redemption lookup1 | 8/4/2015 4:49:34 AM  | <a href="#">Edit</a> <a href="#">Delete</a> |
| 422  | BIRTHDAY           | Customers        | MonthDay | BIRTHDAY           | 8/3/2015 11:51:42 PM | <a href="#">Edit</a> <a href="#">Delete</a> |
| 2787 | redemptiontype     | Redemptions      | Numeric  | redemptiontype     | 8/3/2015 12:41:21 AM | <a href="#">Edit</a> <a href="#">Delete</a> |
| 2786 | prodlook           | Products         | Lookup   | prodlook           | 7/27/2015 1:47:59 AM | <a href="#">Edit</a> <a href="#">Delete</a> |

Showing 1 to 15 of 156

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TIBCO® Reward

## Setting Up an Attribute

To set up an attribute, perform the following steps:

### Procedure

1. Click the **ADMIN** section.
2. Click **System Data > Attributes > Create New**.

The **New Attribute** page is displayed.

3. Specify the values for Attribute Setup, which includes the following:

- **Category**
- **Type**

4. Specify the values for Attribute Information, which includes:

- **Name**
- **Reference Tag**
- **Display Format**
- **Internal Note**

5. Click **Done** to set up an attribute.

**i Note:** The create attribute functionality may not be available in the **ADMIN** section of your TIBCO Reward instance. Contact your Account Manager for updates to the **ADMIN** section.

## Searching for Attributes

To search for an attribute, perform the following steps:

### Procedure

1. Click the **ADMIN** section.
2. Click **System Data > Attributes**.

The **Attributes** page is displayed.

3. Enter the name or ID of the attribute and press Enter.

If the entered attribute exists, the record is displayed, otherwise the message There are no records to display is displayed.

**i Note:** Enter at least 3 characters in the search bar to display suggested results in the lookup value text box.

## Filtering the List of Attributes

To filter the list of attributes perform the following steps:

### Procedure

1. Click the **ADMIN** section.
2. Click **System Data > Attributes**.  
The **Attributes** page is displayed.
3. Select a particular category and type of attribute using the provided drop-down boxes.  
The records are displayed based on the selection.


## Editing an Attribute

To edit an attribute, perform the following steps:

### Before you begin

See [Setting Up an Attribute](#) to know how to set up an attribute.

### Procedure

1. Click the **ADMIN** section.
2. Click **System Data > Attributes**.  
The **Attributes** page is displayed.
3. Use the navigation bars, or the search bar, to access a particular attribute. See [Searching for Attributes](#) for more details.
4. Click the name of the attribute or click .  
The **Edit Attribute** page is displayed.
5. Make the necessary modifications to the attribute and click the **Done** button.


## Cloning an Attribute

To clone an attribute, perform the following steps:

### Before you begin

See [Setting Up an Attribute](#) to know how to set up an attribute.

### Procedure

1. Click the **ADMIN** section.
2. Click **System Data > Attributes**.  
The **Attributes** page is displayed.
3. Use the navigation bars, or the search bar, to access a particular attribute. See [Searching for Attributes](#) for more details.
4. Click  to clone an attribute and click the name of the cloned attribute.  
The **Edit Attribute** page is displayed.
5. See [Editing an Attribute](#) to make modifications to the cloned attribute.
6. Click **Done** after making the modifications to the cloned attribute.

## Entities Overview

Entities store client-definable information. Entities differ from attributes in that a member can have multiple values stored for a given entity, and that each of these may have multiple entity attributes. For example, a customer may own multiple electronic devices: a cell phone, laptop, digital camera, and so on. That customer can create an entity called "Devices" that is capable of holding values for as many devices as are needed. In this example, the device entity might include attributes such as type, brand, model, serial

number, size, and so on.

The screenshot shows the TIBCO Reward Admin interface. The top navigation bar includes links for HOME, TARGET, OFFERS, MEASURE, and ADMIN. The left sidebar lists various admin functions under PROGRAM ADMIN and SYSTEM ADMIN. The main content area displays a table of entities with columns for ID #, STATUS #, NAME, APPLIES TO, REFERENCE TAG, UPDATED, and ACTIONS. A search bar is located above the table. The table contains 15 rows of data, with the first row being 114 Saved 111test Customer test111. The bottom of the table shows pagination: Showing 1 to 15 of 52.

| ID # | STATUS # | NAME           | APPLIES TO | REFERENCE TAG           | UPDATED                | ACTIONS |
|------|----------|----------------|------------|-------------------------|------------------------|---------|
| 114  | Saved    | 111test        | Customer   | test111                 | 10/23/2015 1:10:49 AM  |         |
| 113  | Saved    | test123        | Customer   | test123                 | 10/23/2015 12:39:09 AM |         |
| 112  | Saved    | build5Entity   | Customer   | build5Entity            | 10/23/2015 12:36:21 AM |         |
| 111  | Saved    | dfsaf          | Customer   | fdsasfda                | 10/21/2015 5:27:34 AM  |         |
| 110  | Saved    | gfdgds         | Customer   | gfdsgdsgfdg             | 10/21/2015 5:15:58 AM  |         |
| 109  | Saved    | Test11         | Customer   | Test11                  | 10/21/2015 5:15:44 AM  |         |
| 108  | Saved    | MyEntity21Oct2 | Customer   | MyEntity21Oct2          | 10/21/2015 4:41:50 AM  |         |
| 107  | Saved    | MyEntity21Oct1 | Customer   | MyEntity21Oct1          | 10/21/2015 4:31:33 AM  |         |
| 106  | Saved    | vent2345       | Customer   | dsafsd                  | 10/20/2015 3:06:57 AM  |         |
| 105  | Saved    | venty20        | Customer   | fdsfdfds                | 10/20/2015 2:32:03 AM  |         |
| 104  | Saved    | Test_Loic_Name | Customer   | Test_Loic_Reference_Tag | 10/19/2015 7:51:54 PM  |         |
| 29   | Saved    | T_Company      | Customer   | T_Company               | 10/16/2015 6:13:20 AM  |         |
| 103  | Saved    | vent12         | Customer   | dfsfdagrgt              | 10/16/2015 5:07:18 AM  |         |
| 102  | Saved    | venty345       | Customer   | trqetrqwrwqre           | 10/16/2015 1:16:06 AM  |         |
| 101  | Saved    | venty34        | Customer   | fdsafsdfff              | 10/16/2015 1:15:51 AM  |         |

## Creating an Entity

### Procedure

1. Click the **ADMIN** section.
2. Click **System Data > Entities > Create New**.

The **New Entity** page is displayed.

3. Provide values for the following fields:

- **Name**
- **Reference Tag**
- **Description**
- **Internal Note**

4. Click **Done**.

A new entity is created.



**Note:** The create entity functionality may not be available in the **ADMIN** section of your TIBCO Reward instance. Contact your Account Manager for updates to the **ADMIN** section.

## Adding Attribute to an Entity

### Procedure

1. Click the **ADMIN** section.

2. Click **System Data > Entities > Create New**.

The **New Entity** page is displayed.

3. Provide values for the following fields:

- **Name**
- **Reference Tag**
- **Description**
- **Internal Note**

4. Click **Save**.

The **Manage Entity Attributes** section is displayed.

5. Select the attribute type from the **Show** drop-down and click **Create New**.

**Show** drop-down has the following values- All Types, number, date/time, lookup and text. All Types is the default value.

Clicking **Create New** displays the **Entity Attribute** page.

6. Provide information for the following fields:

- **Type**
- **Name**
- **Reference Tag**

- **Display Format**
- **Settings**
- **Description**
- **Internal Note**

**Note:** The **Display Format** field does not show up if text and lookup type attribute is selected in the **Type** drop-down field.

In the **Settings** section, the three check boxes are as follows:

- **Is Required:** When selected, the entity attribute data is required and cannot be null. One or more entity attributes must be required. The required field values are used in imports to map data to the correct entity attributes.
- **Is Import Key:** When selected, the data in the entity attribute is used as the unique identifier for data imports. Can only be selected if **Is Required** is selected.
- **Is Editable:** When selected, the data in the entity attribute can be modified (by import or other means).

7. Click **Done**.

This takes you to the **Edit Entity** page displaying the newly added attribute in the **Manage Entity Attributes** section.

8. Click **Done**.

This takes you to entities grid page displaying the newly created, attribute attached entity.

## Editing an Entity

### Procedure

1. Click the **ADMIN** section.
2. Click **System Data > Entities**.  
Entities grid page is displayed.
3. Click the name of the entity you want to edit.



The **Edit Entity** page is displayed.

4. Provide updated values for the fields you want to edit.
5. Click **Save** and **Done**.

This updates the entity and takes you to entities grid page.

## Publishing an Entity

You can only publish an entity after you have created the entity and attached at least one attribute to it.

### Procedure

1. Create an entity. See [Creating an Entity](#) for details.
2. Add attributes to the entity. See [Adding Attribute to an Entity](#) for details.

This step leaves you on the **Edit Entity** page.

3. Click **Publish**.

#### **Note:**

- If you get an error message stating “we need to do some setup before you can publish entities,” contact your Account Manager to request entity setup.
- After publishing an entity, you cannot edit or delete the entity. After an entity is published, it can be used for targeting.

## Deleting an Entity

### Procedure

1. Click the **ADMIN** section.
2. Click **System Data > Entities**.

Entities grid page is displayed.

3. Click  for the entity you want to delete.

The message "Are you sure you want to delete this Entity?" gets displayed.

4. Click **OK**.

The Entity gets deleted from the Entities grid page.

## Searching for Entities

### Procedure

1. Click the **ADMIN** section.
2. Click **System Data > Entities**.

Entities grid page is displayed.

3. Enter the entity in the search bar and press Enter.

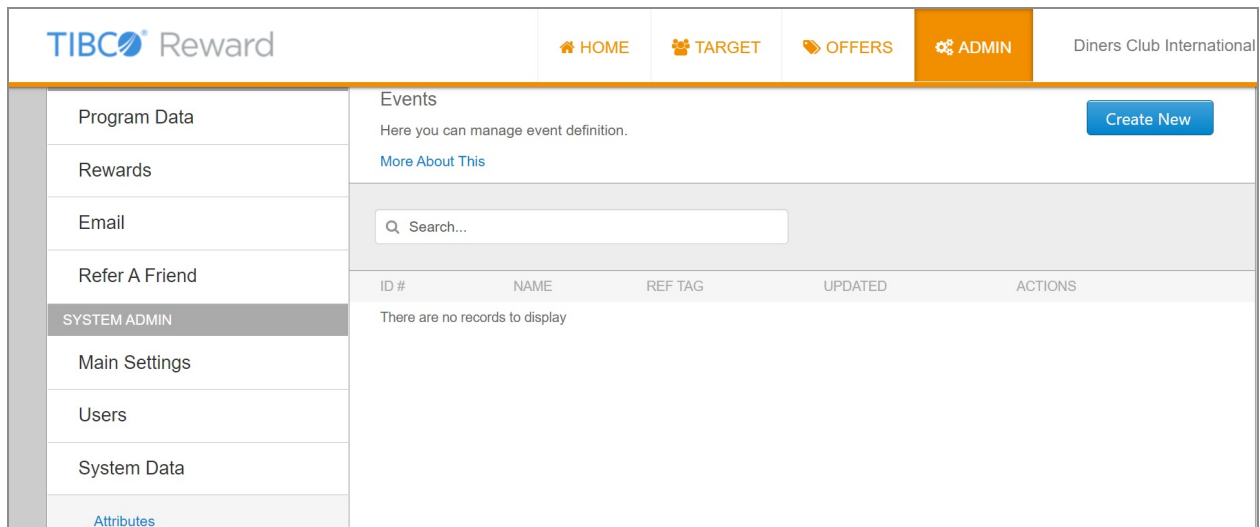
If the entered entity exists, the record is displayed, otherwise the message There are no records to display is displayed.



**Note:** Enter at least 3 characters in the search bar to display suggested results in the lookup value text box.

## Events Overview

An event is a non-purchase event which can be used to trigger offers, target customers, or drive other system functionalities based on the completion of these events.




## Cloning an Event

To clone an event, perform the following steps:

### Before you begin

See [Setting Up an Event](#) to know how to set up an event.


### Procedure

1. Click the **ADMIN** section.
2. Click **System Data > Events**.  
The **Events** page is displayed.
3. Use the navigation bars, or the search bar, to access a particular event. See [Searching for Events](#) for more details.
4. Click  to clone an event and click the name of the cloned event.  
The **Edit Event** page is displayed.
5. See [Editing an Event](#) to make modifications to the cloned event.
6. Click **Done** after making the modifications to the cloned event.

## Deleting an Event

To delete an event, perform the following steps:

### Procedure

1. Click the **ADMIN** section.
2. Click **System Data > Events**.  
The **Events** page is displayed.
3. Use the navigation bars, or the search bar, to access a particular event. See [Searching for Events](#) for more details.
4. Click  to delete an event.  
A dialog box prompts for confirmation. Click **Yes** to delete the event.

## Editing an Event

To edit an event, perform the following steps:

### Before you begin

See [Setting Up an Event](#) to know how to set up an event.

### Procedure

1. Click the **ADMIN** section.
2. Click **System Data > Events**.  
The **Events** page is displayed.
3. Use the navigation bars, or the search bar, to access a particular event. See [Searching for Events](#) for more details.
4. Click the name of the event.  
The **Edit Event** page is displayed.
5. Make the necessary modifications to the event and click **Done**.

## Searching for Events

To search for an event perform the following steps:

### Procedure

1. Click the **ADMIN** section.


2. Click **System Data > Events**.

The **Events** page is displayed.

3. Enter the event in the search bar and press Enter.

You must enter at least three characters for the system to show up search results.

If the entered event exists, the record is displayed, otherwise the message There are no records to display is displayed.

 **Note:** Enter at least 3 characters in the search bar to display the suggested results in the lookup value text box.

## Setting Up an Event

To set up an event perform the following steps:

### Procedure

1. Click the **ADMIN** section.

2. Click **System Data > Events > Create New**.

The **New Event** page is displayed.

3. Provide values for the following fields:

- **Name**
- **Reference Tag**
- **Event Subject**
- **identified by**
- **Event Verb**

- **Event Object**
- **Event Value**
- **Event Description**
- **Internal Note**
- **Reversing Event**

4. Click **Done** to set up an event.



**Note:** The new event functionality may not be available in the **ADMIN** section of your TIBCO Reward instance. Contact your Account Manager for updates to the **ADMIN** section.

# TIBCO® Spotfire Analysis

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The Transport Layer Security (TLS) in TIBCO Spotfire is upgraded to 2.0.

# TIBCO Documentation and Support Services

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For information about this product, you can read the documentation, contact TIBCO Support, and join TIBCO Community.

## How to Access TIBCO Documentation

Documentation for TIBCO products is available on the [TIBCO Product Documentation](#) website, mainly in HTML and PDF formats.

The [TIBCO Product Documentation](#) website is updated frequently and is more current than any other documentation included with the product.

## Product-Specific Documentation

Documentation for TIBCO® Reward is available on the [TIBCO® Reward Product Documentation](#) page.

To directly access documentation for this product, double-click the following file:

`TIBCO_HOME/release_notes/TIB_loyalty_22.3.0_docinfo.html` where `TIBCO_HOME` is the top-level directory in which TIBCO products are installed. On Windows, the default `TIBCO_HOME` is `C:\tibco`. On UNIX systems, the default `TIBCO_HOME` is `/opt/tibco`.

The following documents for this product can be found in the TIBCO Documentation site:

- *TIBCO® Reward Release Notes*
- *TIBCO® Reward User Guide*
- *TIBCO® Reward User Guide V3*
- *TIBCO® Reward CSR User Guide*
- *TIBCO® Reward Integration Guide*
- *TIBCO® Reward API Reference Guide*
- *TIBCO® Reward Analytics User's Guide*



## How to Contact TIBCO Support

Get an overview of [TIBCO Support](#). You can contact TIBCO Support in the following ways:

- For accessing the Support Knowledge Base and getting personalized content about products you are interested in, visit the [TIBCO Support](#) website.
- For creating a Support case, you must have a valid maintenance or support contract with TIBCO. You also need a user name and password to log in to [TIBCO Support](#) website. If you do not have a user name, you can request one by clicking **Register** on the website.

## How to Join TIBCO Community

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