



# TIBCO<sup>®</sup> Reward

## User Guide

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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. Because TIBCO Reward provides a SaaS solution, rather than a packaged enterprise software application, you do not need to purchase, deploy, and maintain additional hardware and software. This approach 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. You can use the TIBCO Reward solution without the outright purchase of a licensed software application.

Because TIBCO Reward performs the data processing and maintains the database, 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 this software and service.

## Features and Benefits

You can use TIBCO Reward to build and strengthen customer relationships in several distinct ways, including the following:

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

**Loyalty Program:**

- Rewards customers with points and other retention-oriented incentives
- Manages accruals, redemptions, reward catalogs, customer tiers, rule-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 any address 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 more

**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

# CRMS User Interface Elements

This chapter describes the User Interface of TIBCO Reward CRMS.

## Topics:

- [User Interface](#)
- [CRMS Navigation](#)

## User Interface

TIBCO Reward's Customer Relationship Management Suite (CRMS) presents an easy-to-use, interactive environment to manage offers, customer segments, communications, and reporting.

TIBCO Reward Clients can use CRMS to set up and manage their own profiles, offers, and communications. It also provides marketing and loyalty program reports. The CRMS automatically processes raw data from your IT department and makes a suite of marketing reports readily available. Marketers do not need to make individual requests for data management, software support, or implementation.

### Home Page

When you open the CRMS application, the home page is displayed. The home page is the initial point of access to CRMS and its capabilities.

The dashboard section provides tables and graphs indicating the level of customer response to the loyalty program. It includes information on the status of offers generated by CRMS. You can view different periods to see the performance over the past year, quarter, month, or week.

The screenshot displays the CRMS dashboard with the following sections:

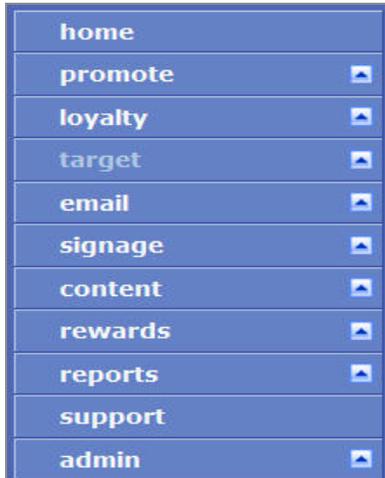
- Offer Status:** 60 offers for review, 5 offers expired.
- New Member Signups:** A table showing signups by period.
 

Period	total	avg/day	vs. prev
day	0	0	-
week	0	0	-
month	1	0	-
year	28	0	-
- announcements:** No announcements at this time.
- top offers:** A table listing offers with their names, award types, and performance metrics.
 

Offer Name	Award	Views	Accepts	Redemptions	Unique Redemptions
12 Month Member Tenure Reward	Points	0	0	1232	1232
Live-GB_1	Points	0	0	0	0
Copy Of Rachel Test New Offer	Points	2	0	0	0
Buy 10 Books in One Year Get a Day Free	Non-Unique Reward Code	4	0	0	0
Buy X number of products, get award	Points	0	0	0	0

## Menu

The CRMS menu provides access to the major features and capabilities of CRMS. Click one of the top-level subjects to see the associated menu, then click a menu option to open the associated page or wizard.



## CRMS: Navigation

When you click each major heading (promote, loyalty, email, etc.) on the menu, a drop-down list of options is displayed. Click one of these options to open the associated page.

Sometimes, an option starts a wizard (for example, **Create New Offer**). When you work with a wizard, CRMS provides a sequence of pages that correspond to the steps for completing a task. After you complete each page, you can click **Next Step** to open the next page and complete the next step.

Clicking a menu option opens a page that displays labeled tabs, each corresponding to a different page. You can navigate from one page to another by clicking the tab for each page.

Each page includes simple controls with which you can perform basic functions. Instructions for using many of these controls are embedded in the application.

Standard controls such as the following are displayed on many pages:

The **Show** drop-down menu:



To filter the items in a list, click the down arrow next to the drop-down menu.

The page number control:



To navigate to another page of listed items in a multipage listing, click the page number.

The **Back** button:



The **Next Step** button:



Use these buttons instead of the browser forward and back keys to ensure you do not lose any unsaved work.

## Saving Your Work

To save your work on the current page, use one of these options:

- Click **Save** to save the information on the current page. The page remains open.
- If you are working with a wizard-driven workflow, click **Next Step** to save the information on the current page and advance to the next page in the workflow.
- Click **Done** to save the information on the current page, close the page, and move to the page at the next higher level in the CRMS user interface hierarchy. If you completed a sub-task, you are returned to the main task page.
- If you are working with a wizard-driven workflow, you can use the **Jump to Step** drop-down menu to get to a new destination page in the wizard or workflow sequence that you are currently using. If you use the **Jump to Step** control, the CRMS saves the data in your current page before opening the page you selected.

**i** **Note:** When in doubt about whether you are navigating to a new location, save your work. If you change pages by selecting a new option in the CRMS main menu tab, or a different tab that opens a higher level page, you lose any unsaved data on your current page. For example, if you are currently typing data into a page in a wizard, and you select a new menu tab without first saving you work, you lose your unsaved work.

# CSR

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This section contains information about the CSR Interface and customer management.

## Topics:

- [CSR: Overview](#)
- [CSR: Roles & Privileges](#)
- [About Customers](#)
- [Creating Active Customer account](#)
- [Creating a New Enrolled Customer Account](#)
- [Customer: View Details](#)
- [Customer: Edit](#)

## CSR: Overview

Select **Support** from the CRMS menu to access the Support and Customer Management interface. The Support page provides access to all existing customer accounts for creating and managing customers.

The Support page includes the following items:

- **Add a New Enrolled Member** : Add a new customer account in the Registered and Active state. This new customer is enrolled as a member of the loyalty program. If applicable, password for access to a microsite is emailed to the customer.
- **Add a New Non-member Customer** : Add a new customer in the Unregistered and Active state. This new active customer can be sent an email. If Reward receives transactions identifiable with this customer, they can be used for targeting. This customer is not a member of any loyalty program or club.
- **Search** : Find existing customers with available fields that can be used to filter the search results. At least one search criterion must be provided. Searches are not case-sensitive.

The available search criteria are:

- **Email** : searches the beginning of the email address field. Customer accounts that start with the value entered are included in the results. For example, searching for “s” returns sales@loyaltylab.com and support@loyaltylab.com, whereas searching for “sa” returns sales@loyaltylab.com. Ensure that you use customer's email address to find an individual customer.
- **First Name** : searches the first name field. Customer accounts that start with the value entered are included in the results. For example, searching for “m” returns any name beginning with "m" (for example, Michael, Miguel, and Mark), whereas searching for “mi” returns only names beginning with those two letters (for example, Michael and Miguel).
- **Last Name** : searches the beginning of the last name field. Customer accounts that start with the value entered are included in the results.
- **Zip/Postal Code** : searches the beginning of the zip/postal code field. Customer accounts that start with the value entered are included in the results. For example, searching for “9” returns 94111 and 90210, whereas searching for “94” returns 94111.
- **Customer ID** : The customer’s unique ID within the Reward system.
- **Member Status** : filters search results according to member status: Any, Enrolled Members, or Non-Member Customers.
- **Reset** : removes any values entered in the search interface.

If your search results are more than 200 entries, only the first 200 are visible. Individual customer accounts can be accessed by expanding the customer and clicking the **View Details** link on the left side of the search result.

## About Customers

You can create two basic types of customers in CRMS:

- **Active Customers/Unenrolled member/Non-member customer** Many companies import lists of persons who are automatically defined as active customers, that is, their status is set to Active. Active customers are not members of the loyalty program. They are usually added to the system so that they can be sent emails or their transaction data can be used for customer data analyses. Customers who are

members of the loyalty program are considered "enrolled". Usually, much less data is available for active customers than enrolled customers. Active customers can be converted into enrolled customers.

- **Enrolled Customers** are full loyalty program members, and can be engaged in all aspects of the loyalty program. For example, they can accrue points or credit; if opted-in, they can be sent email and they can be targeted for offers, and so on. You can add a new enrolled member or non-member customer by using **Add New Customer** button in the upper-right corner of the CSR Page . You can also convert (enroll) an existing active customer into an enrolled customer by using the **Enroll** option on the Customer Details page.

**i Note:** Even if you do not currently have a loyalty program, you can still have enrolled customers.

## Creating Active Customer Account

### Procedure

1. Click the **Support** tab in CRMS to open the CSR tool.
2. Click **Add New Customer** in the upper-right of the page.
3. Select the **Add a New Non-Member Customer** option.  
This opens the New Un-Enrolled Information dialog.
4. Enter information about the new un-enrolled or active customer.

**i Note:** Email Opt-in and Opt-out applies to promotional emails and not targeted offers.

5. Click **Create**.

Enrolled customers are full loyalty program members. You can convert (enroll) an existing active customer into an enrolled customer by using the **Enroll** option in the Customer Details page for an existing active customer if you are an Administrator and not CSR Administrator. However, if you do not currently have a loyalty program, you can still have enrolled customers.

# Creating a New Enrolled Customer Account

## Procedure

1. Click the **Support** tab in CRMS to open the CSR tool.
2. Click **Add New Customer** in the upper right of the page.
3. Select the **Add a New Enrolled Member** option.  
This opens the New Enrolled Information dialog.
4. Enter information about the new enrolled customer.

 **Note:** Email Opt-in and Opt-out applies to promotional emails and not targeted offers.

5. Click **Create**.

You can add or edit many details of the enrolled customer's account on the Customer Details page.

## Customer: View Details

After you create the customer account, you can add and change details associated with that account through CSR's Customer Details page.

From the search result page, clicking on any customer name displays the Customer Details page. The Customer Details page displays the following types of information: Latest Transactions, Rewards, Email, Lists, Customer Information including Name, Address, Phone, Email, Member ID, Status, Available Points, Available points in Each Point Group, Tier, Tier Join Date, Tier Expiry Date, Marketing Program Number, Customer Type, Email Opt-In, Program Join, Shopper Create Date, Current Year Limit, Cards and Change History.

**i Note:**

- When an unenrolled customer is created on the basis of a set of customer fields that include customer phone number and not the email address, a (false) placeholder email address is generated for the customer.
- Many types of data are not provided for unenrolled customers who are not part of the loyalty program. In general, if a category of customer data is not used to support a loyalty program member, it is not collected and displayed in the customer data displays.

## Customer: Status

The **Customer Type** section of the Customer Details page displays the current status of this customer. Valid customer types include the following:

### Active

This is an active customer who is not enrolled as a loyalty club member. All accounts imported through **List Management** are automatically created as active customers. Most often, Active customers are present in the system so that your company can send email to them and maintain data about them as customers. Active customers are not loyalty program members, and cannot accrue any points or credits. Active customers can be enrolled or merged into an enrolled customer account.

### Inactive

When an enrolled customer is unenrolled, they become inactive. When a customer is in this inactive status, that customer can either be made active or reenrolled. One notable exception is: if the shoppers or customers closed the account by themselves, no CSR user, not even an Administrator, can reactivate the account.

### Enrolled

These customers are full loyalty program members. Loyalty members can accept offers and earn points, and can have access to the hosted Reward Account pages. Enrolled members can be merged, have points added to their account, can be unenrolled, and more.

### Deactivated

Deactivation changes the customer status to inactive, which effectively puts the customer on “hold”. The customers cannot log into their accounts and cannot accrue

any points, although existing points remain on the account, which can be reactivated with no loss of data.

Example: A Client might want to use this option to temporarily disable accounts that are not in good standing (perhaps because a customer did not pay required dues). After the account is back in good standing, the client would reactivate it. Reactivation is the only valid option for a deactivated customer.

### **Merged**

When an active or an enrolled customer account (1) is merged into an enrolled customer account (2), the status of the account (1) is reset to **Merged**. Merged customers are effectively inactivated customers. Merged customers can only be reenrolled, which changes their status to enrolled. For additional information, see [Customer: Merge](#) for more information.

Additional information on the Status section of the Customer Details page includes the following:

### **Member Since**

The date when the customer associated with the account became a member of your loyalty program.

### **Available Points**

The number of points currently available to this customer for use.

### **Pending Points**

If your system is configured to use Point Vesting, this value displays the current balance of points pending. Otherwise, a zero (0) is commonly displayed here.

### **Email Opt-In**

If the customer has opted to receiving email, this value displays as “**Yes**”. This can be changed by the customers themselves in their Account page (depending on your configuration) or this value can be changed on the Edit Info screen.

### **Customer ID**

The customer’s unique ID within the Reward system.

### **Loyalty Lab Create Date**

This is the date when the customer account was created in the Reward database.

## Customer: Change History

This section lists each change or update to the customer account along with the date and time of the change and the source of the change.

## Transactions

This section provides access to customer transaction data. Note that not all transactions are listed. Transactions are included here only if they contributed to the qualification for a loyalty program award.

## Email

This display shows the email communications sent to a customer within the last six months. The Reward nightly batch process system populates this list of emails, so it can take up to 24 hours for a sent email to be displayed here. It lists only email sent through the Reward Email Communications system; it does not display any email sent through the Trigger Event Response Email system, such as Forgot Password or Offer Reminders email.

For each email listed, the information includes the **ID**, **Subject**, **Date**, and **Status** Columns sorted on date descending. The values in **Status** column can be **Sent**, **Hard Bounced**, and **Soft Bounced**.

## Rewards

The Rewards section displays information about customers log of awards received or spent.

## Customer: Edit

In addition to displaying customer information in several categories, the Customer Details page provides links to other customer pages where you can add and modify customer data. Depending on the status of the current customer, the following links are available:

## Edit Info

Opens the Customer Information page, which you can use to edit basic name and address field values.

## Reset Password

Sends a new password and the associated message to the customer.

## Password History

The password history of upto five passwords is stored in TIBCO Reward. If a new password matches any one of the previous five passwords for the user then the following error message is displayed:

Invalid password : New Password should not match with last 5 Passwords.

## Password Rules

The following rules are applicable for a password used for logging in to TIBCO Reward:

- Password minimum length is upto 8 characters
- The password must contain all the following letters: upper case character, lower case character, numerical digit, and a special character
- The password cannot contain your first name or last name

## Adjust Points

Opens the Adjust Points page. Note that the number of points to be added and the **Description** text are required. The **Reason** text is visible to the customer, but not the **Internal Note** text. After supplying data, click **Next**. A confirmation message is displayed. If details are correct, click **Done**.

## Merge

You can merge current customer account data into another (enrolled) customer account, or merge another customer account into the current customer account (if it is for an enrolled customer). Refer to [Customer: Merge](#) for more information.

## Change Status

Change status option is available only for enrolled customers. Through this option you can unenroll or deactivate customers. The customer is enrolled as a member of the loyalty program, and all related functions and options for enrolled customers are supported.

## Un-enroll (an existing customer)

The customer service representative (CSR) can unenroll (that is, close the account for) a customer who no longer wants to be enrolled in the loyalty program. Unenrolling has the following effects:

- The customer is deactivated (that is, status is changed from active to inactive), and is no longer a member of the loyalty program. In addition, if the email option was set to true, it is changed to false.
- The customer no longer accrues points (if applicable) or receives offers.
- The customer cannot sign into **My Account** anymore.

## Manage Card

Manually adds card data (credit card, loyalty card, membership card, and so on.) to be associated with an enrolled customer. After you select **Manage Card** from the **More Options** drop-down list at the top of the Customer Details page, the **Manage Card** dialog box is displayed. Use this to enter card data. Be aware that this dialog box applies a card number validation test. After a card number is entered, only the last four digits of that card's number are displayed.

## Deactivate Account

Deactivation changes the customer status to inactive, which effectively puts the customer on “hold”. The customers cannot log into their account and cannot accrue any points, although existing points remain on the account, which can be reactivated with no loss of data. Deactivating leaves the **Email Opt-In** selection untouched.

Example: A client might want to use this option to temporarily disable accounts that are not in good standing (perhaps because a customer did not pay required dues). After the account is back in good standing, the client would reactivate it. Reactivation is the only valid option for a deactivated customer.

**i Note:** Your company has the option to use an Admin setting to reset the point balance to 0 (zero) when the customer account is deactivated. The alternative is to leave balances unchanged by deactivation.

# Promote

---

This section provides information about promotional offers.

## Topics:

- [Offers](#)
- [Offer Lifecycle](#)
- [Prerequisites](#)
- [Offers Page Overview](#)
- [Creating an Offer](#)
- [Change Status](#)
- [Cloning an Offer](#)
- [Deleting Offer](#)
- [Award Options](#)
- [Returns](#)

## Offers

You can use CRMS to create an offer that awards your loyalty program members a predefined award after meeting a certain criterion. Another popular offer awards bonus points for signing up for the loyalty program.

The **Edit Offer Details** wizard helps you create offers. After you finish each step, the wizard simplifies the remaining steps by displaying only the options that still make sense for you to use. These options are selected based on the choices you have already made.

To create an offer, select **Promote > Offers > Create New Offer**. (See [Creating an Offer](#) for more information.)

To edit an existing offer, select **Promote > Offers** to open the Offer page. Click the name of the offer you want to change. This opens the **Edit Offer Details** wizard, which guides you through defining an offer by completing a sequence of pages.

The steps required to create or edit an offer involve the following offer pages:

- Description
- Qualification & Award
- Basket Targeting
- Customer Targeting
- Presentation
- Schedule & Rules
- Summary and Preview
- What's Next? -- Go to Offers

After completing each page, click **Next Step** to advance to the next page until the offer is over.

## Offer Lifecycle

An Offer Lifecycle involves creating, defining, and saving an offer record. As the definition of an offer progresses from a saved record with basic contents to an approved, live offer, the formal status of the offer changes accordingly.

At any point in the creative process, CRMS users can review and modify a saved offer.

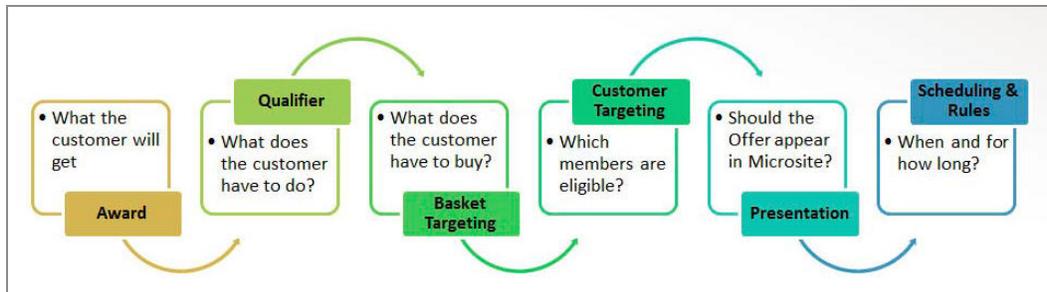
When all requirements are met, the status can be changed from Saved to Pending. If approved, the offer's status can be reset to make it Live.

Live offers are made available to the targeted customers through the Reward hosted Offer Showcase, your store-site, or the Reward microsite, or both, according to the schedule that you define.

After an offer goes live, all customer responses to the offer are captured, analyzed, and summarized for the CRMS user. The information is displayed on the Summary & Preview page for both live and completed offers.

## Anatomy of an Offer

This graphic represents the flow of creating offers in CRMS.



## Prerequisites for Creating an Offer

Certain types of offers can only be defined if your company has provided the required data to TIBCO Reward. For example, if you want to award an offer based on purchases within a category, TIBCO Reward must receive a product file that indicates which categories you have defined and which products are in each category.

Prerequisites for any given offer typically depend on the following specifications :

- How you want to qualify a customer
- The profiles of your targeted customers
- The type of award you want to provide
- Whether you want to restrict the offer redemption to specific stores

Fundamental requirements for setting up offers include the following :

- If you want to create offers that require a purchase, your company must provide TIBCO Reward with your transactions files. Transactions files provide the data necessary to track purchases and give awards for purchases.
- If you want to create offers that require the purchase of a specified product or category of product, you must give TIBCO Reward your product file and your transaction files.
- If you want to restrict redemptions to stores, you must give TIBCO Reward your store file.
- If you want to use the 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 create an offer based on an activity or activities, you must set up the

activities first in CRMS. Note however, that the sign-up activity is always available and does not require a setup.

## Notes on Data Integration requirements

Many types of offers depend on some level of data integration, that is, the collection and processing of corporate data for use in the CRMS system.

If your company has already implemented the necessary technology and processing, the data integration requirement is not a concern when you create offers. However, if this is not the case, and you want to build offers that are based on a type of data integration that your company does not yet support, please contact your customer service representative to discuss the improvement.

Some types of data integration are more common than others, and some are easier to implement. As a rule of thumb, do not assume that your company does not or cannot support some type of data integration. The transfer of transaction files is quite common, for example; if your company sells products or services, it might already have set up this processing. In any case, the transfer of transaction files is relatively easy to set up. Product, catalog, and store file transfers are also quick to arrange.

## Offers Page Overview

The Offers page under the **Promote** tab provides access to all offer records. The Offers page lists all offer records that have been defined or are in the process of being defined.

The Offers page includes the following features :

- The **Create > New Offer** option.
- The Current Offers panel, which consists of :
  - Standard Navigation Controls (For Example, The **Show** Filter and The **1 2 3** Page Control)
  - The complete list of offer records

Each row in the Offers page represents an offer record. Column headings identify the offer record fields displayed in this list. Click a column heading to sort all of the offers in the list by that field. Following are the columns of each offer record.

### **Status**

the current status of the offer record, and to change the status of the offer when appropriate

### **#**

the unique Offer record ID number, automatically assigned by CRMS when the record is created

### **Offer Name**

the name of the offer as defined in CRMS, and set up as a hyperlink to the offer record. Click the offer name to open the record in the Edit Offer Details wizard.

### **Award**

the type of award associated with the offer

### **Start**

the date when the offer is or was scheduled to start. This is the field used by default to sort the offer records. When you open the Offers page, records are in order by start date, from latest to earliest

### **End**

the date when the offer is scheduled to end

### **Clone**

you can clone the associated offer record

### **Delete**

you can delete the associated offer record

Use the Offers page to:

- Create a new offer
- Find an existing offer
- Edit existing offer details
- Change the status of an offer
- Clone an offer record
- Delete an offer

# Creating an Offer

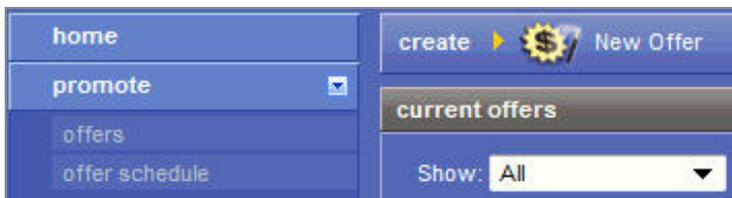
To create a new offer, click **Promote > Offers** and then **Create > New Offer** on the Offers page. This creates a new offer record and starts the edit offer details wizard.

You can also create a new offer by cloning an existing offer. Cloning is especially useful when you want to duplicate most of the attributes of the existing offer. Be aware that some offer options have specific data requirements. To use these options, your company must have already provided certain data files. See [Prerequisites for Creating an Offer](#) for more information.

Follow these steps to create a new offer using the Offer Setup wizard:

## Procedure

1. Click **Promote > Offers**.
2. Click **Create > New Offer**



This opens the **Edit Offer Details** wizard.

3. Complete the new offer by using the Edit Offer Details wizard to finish the process.  
(Fields marked with an asterisk \* are required.)

The Offer Setup wizard helps you modify an existing offer or set up a new offer.

To use the Offer Setup wizard to work on an existing offer, click an offer name listed in the Offers page.

To create a new, blank offer record and immediately start the editing process, select **Promote > Offers > Create New Offer**. The Offer Setup wizard automatically opens.

The Offer Setup wizard guides you through the following required steps to create an offer:

- Description
- Qualify & Award
- Basket Targeting

- Customer Targeting
- Presentation
- Schedule & Rules
- Summary & Preview
- What's Next - Go to Offers

The last step submits the offer for approval by placing it in pending status.

## Offer Description Page Overview

The Offer Description page records the Offer Name and other crucial information used to identify the offer and its purpose. Some of this description information is displayed to users.

Defining and saving the offer description is the first step in creating a new offer or editing an existing offer. The Description page opens when you create a new offer, clone an offer, or open an existing offer record for editing.

In the Offer Description page, you can describe an offer by recording data in the following fields:

- **Offer Name** is an internally used name that the customer does not see. It serves to identify and describe the offer record in the Offers page; choose a name that is descriptive and unique. Ideally, the new name should indicate the basic type of customer qualification you require and the type of award you give. Mentioning the target or date also makes the name more descriptive.
- **Headline** is the title text for the offer that the customer sees in the Reward-hosted Offer Showcase. It is also used to describe the offer in the customer's **My Account** and **Shopping List** displays. It is also displayed in email communications and signage that mention this offer.
- **Description** is the text that is displayed to the customer in the Reward-hosted Offer Showcase and provides more information about how the offer works. It is also displayed in email communications and signage that mention this offer. Use this text to explain the offer to the customer.
- **Online Product Page URL to "Buy Now"** contains the URL (optional) of the product page where the customer can buy the product immediately. This field is part of the Showcase display of the offer, giving the customer the opportunity to act on impulse.

- **Terms & Conditions** contains rules of the offer, disclaimers, and other legal conditions. This text, if present, is included in the showcase display to the customer. It is also displayed in email communications and signage that mention this offer.
- **Internal Note** is text used internally in CRMS, and is only displayed on this page.

**i Note:** After finishing work on this page, click **Next Step**. This saves your work and advances the wizard to the Qualification & Award page, the next step in the Edit Offer Details workflow.

## Defining the Description of an Offer

### Procedure

1. Start the **Edit Offer Details** wizard.

When you create a new offer record or edit an existing offer record, the **Edit Offer Details** wizard starts automatically, and the Description page opens first. The new offer record contains no data except for a unique offer ID number and a sample offer name.

2. Replace the offer name with a unique, specific name.
3. Enter or edit the **Headline** text.

The headline text is used as the headline for the offer in the offer showcase. It is also displayed in email communications and signage that mention this offer.

4. Enter or edit the **Description** field text.
5. Enter a new URL string in the **Online Product Page URL to "Buy Now"** field.
6. Enter or edit text in the **Terms & Conditions** field.
7. Enter or edit text in the **Internal Note** field.
8. Enter a new URL string in the **Online Product Page URL to "Buy Now"** field. This information can be provided to customers who can then navigate to the site to purchase the product.
9. Click **Next Step**.

This saves your work and opens the Qualify & Award page.

**i Note:** When you open the Description page, you must review all default and preexisting data. Remove unwanted data and add the new correct data.

## Offer Qualification and Award

Use the Qualify & Award page to define the following in an offer record:

### Award

The award given to a targeted customer who qualifies for redemption of an offer.

### Qualification Action

How a targeted customer qualifies for the offer.

### Best Award Group

The number of point-awarding offers a member can earn as the result of a single transaction. For example, if a member qualifies for two or more offers that have the "Best Award Group" option selected, Reward only awards the points from the best of those offers to the member.

### Additional Conditions

Are there any additional conditions to qualify for this offer?

## Award

In the Award section of the edit offer details page, the pull-down menus used to define award characteristics are the following:

- Award Types
- Point Types
- Points Amount
- Custom Award Text

Award Types

- Points
- Points up to member point limit
- Points per Event Value
- Double points
- Triple points
- Points per monetary unit
- Custom points per quantity purchased
- A bonus
- A sweepstakes entry
- % Off on purchase
- Money Off on a Purchase
- Reward code

## Action Types

In the Qualification Action section of the Edit Offer Details page, you can use several pull-down menus to specify the requirements to qualify for award.

To receive the award, targeted members should do at least one of the following:

- Must make a transaction
- Perform an activity
- Complete an event
- Complete an event that uses Event Value
- Need not do anything

## Actions

Entering different requirements to qualify for the award causes different options to be displayed in the Qualification Action section. These subfields further determine the requirements for the award qualification.

- Must make a transaction - Selecting this option means you want a customer to make a transaction to qualify for the award.
- To complete this answer, select the transaction type:
  - Purchase any number of items of any products.
  - Purchase any number of items of select products.
  - Purchase any number of items in select categories.
  - Purchase any number of items of select brands.
  - Purchase a number of items of select brands.
  - Purchase a number of items of select products - If you choose this option, you must also use the Select Products procedure to add to the list. Click **Add Products** to get started.
  - Purchase a number of items in select categories - If you choose this option, you must also use the Select Categories procedure to add to the list. Click **Add Categories** to get started.

**i Note:** To see and select products or categories, your company must already have supplied TIBCO Reward with a product catalog list. See [Prerequisites for Creating an Offer](#) for related information.

- Purchase using select tender types.
- Spend a number of monetary units on any products.
- Spend a number of monetary units on select products.
- Spend a number of monetary units in select categories.
- Spend a number of monetary units on select brands.
- Make a daily visit - Evaluate this to determine if the offer qualification is met:
  - Each line item in basket
  - All basket contents
- Perform an activity - To complete this answer, select **Activity** from the pull-down menu and enter the number of times the activity must be performed.
- Complete an event - To complete this answer, select event by clicking **Select Event** and then enter the number of times this event must be completed.

- Complete an event that uses event value - To complete this answer, select event by clicking **Select Event** and select the check box to only allow events where event value is within a specific range.
- Need not do anything.

## Uploading Offer Qualifying Product Stock Keeping Unit (SKU) as a File

You can upload offer qualifying product SKUs as a file from the CRMS UI, on the offer qualification page in order to create an eligible list of products for the offer. Similarly, you can also exclude certain product SKUs to create a list which does not qualify for the offer.

A note that states "**Only SKUs that exist in your product file may be attached to an offer**" is displayed beside the **Upload** button.

Following are the important points while uploading a product SKU file:

- The uploaded SKUs reference the existing SKUs in the client's database.
- The uploaded SKUs do not create new products in the client's product file if the SKU uploaded does not currently exist in the client's product file.
- When attempting to upload a file that has SKUs that do not exist in the product file, the file processes only the valid SKUs. The number of invalid SKUs appear in a "No Matched" column.
- If a file is uploaded that attempts to attach SKUs that have already been attached to the offer, the duplicates are ignored. The number of duplicate SKUs appear in a "Duplicate" column.
- The "**Download**" link with mouseover text as "View Report" links to a downloadable report that displays each line that was not successfully matched to the offer in the following format:

" Line [x]: [Product SKU] was not successfully attached to the offer because [reason]"

Where:

[x] = The line number of the SKU attempting to be attached

[Product SKU] = The product SKU number attempting to be attached

[reason] = The reason the attachment failed (for example, "it does not exist in the product file" or "it is already attached to the offer" (that is, a duplicate])

## Attaching Product SKU File to an Offer

### Procedure

1. During the offer creation process, in the Edit Offer Details page, set the value of the pull down menu **To receive this award, targeted members to must make a transaction.**
2. Select a transaction type which allows you to define a set of selected products.  
The **Qualification Action** panel changes and an **Add Products** button is displayed. You can include or exclude the purchases by using a defined set or product attribute value. The **Add products** button is displayed when you select a defined set of purchases.
3. Click **Add Products** button.  
The Select Products modal is displayed.
4. Click **Upload SKUs** tab, select the file to be uploaded and click **Upload**.  
The file gets uploaded and the result is displayed in a table.
5. Click **Done**.

## Qualification Evaluation Level

When you create an offer, you have the option on the Qualify & Award page to either select **all basket contents** or **each line item in basket** for each transaction.



The type of evaluation you choose determines how CRMS calculates the points awarded from a transaction.

The effect depends on the following factors:

- The cost of the items purchased
- Redemption limits
- Type of award: “points per monetary unit”, points” or something else.

### Points per Dollar Offer Differences

When you set up a Points per Monetary Unit Offer, differences in point calculation can impact the number of points awarded. Under certain circumstances these differences can be significant.

**Award**

This offer awards  to targeted members

points type:

Enter the number of points that a customer receives for each dollar spent:

When the system evaluates **each line item in basket**, the system assigns points for every qualifying item in the transaction.

When the system evaluates **all basket contents**, it still looks at each item in the basket, but points are calculated on the total of the qualifying items in the transaction.

In this example, all items qualify.

		Points Awarded	
		Basket Level Evaluation	Line Item Evaluation
Item A	\$7.50	x	8
Item A	\$7.50	x	8
Item B	\$25.00	x	25
Item D	\$13.95	x	14
item D	\$13.01	x	14
<b>Total</b>	<b>\$66.96</b>	<b>67</b>	<b>69</b>

Notice that you end up with slightly different point totals. This is because CRMS rounds up to the nearest whole number when calculating points.

When you evaluate at the Basket level, that rounding happens once, on the basket total. When you evaluate at the Line Item level, the rounding happens on every item. While two points is not a big difference, it is still a difference of about 3% -- extend that to a million transactions, and it is a 2,000,000 point difference.

The point calculation differences are even more pronounced when the items are relatively

		Points Awarded	
		Basket Level Evaluation	Line Item Evaluation
Item A	\$0.25	x	1
Item A	\$0.25	x	1
Item B	\$1.25	x	2
Item D	\$0.75	x	1
item D	\$0.75	x	1
<b>Total</b>	<b>\$3.25</b>	<b>4</b>	<b>6</b>

low-priced.

In this case, the difference is about 33%! This is a big difference.

### Points per monetary unit and Redemption limits

If you set up an offer that awards points per monetary unit and that has a redemption limit, each item in the basket that qualifies for an award counts as a redemption.

Consider the offer "purchase any number of select products" that awards "points per monetary unit", that has a redemption limit of 2, where the qualifying products are Item A & Item B.

			Points Awarded	
			Basket Level Evaluation	Line Item Evaluation
Item A - \$5.95		x		6
Item B - \$22.95		x		23
Item C - \$10.50		x		0
Item D - \$12.25		x		0
Item E - \$55.95		x		0
<b>Total Points</b>			<b>108</b>	<b>29</b>

In this scenario, under basket level evaluation, the system awards 108 points and records a single redemption against the redemption limit of 2.

If the same offer is configured with line item evaluation, the system awards 29 points and records two redemptions against the redemption limit of 2. In addition, the system awards the first two qualifying items and hence the order in which the items are listed when we import them matters. Note in the following image that if item C and item E are listed first in the transaction, those are the items that qualify. The difference, if points earned, is 67

	Points Awarded	
	Basket Level Evaluation	Line Item Evaluation
Item C - \$10.50	x	11
Item E - \$55.95	x	56
Item D - \$12.25	x	0
Item A - \$5.95	x	0
Item B - \$22.95	x	0
<b>Total Points</b>	<b>108</b>	<b>67</b>

points versus 29 points.

### Fixed Point Offer Differences

When you set up a **Fixed Point Award**, whether you choose to evaluate **each line item** or **all basket contents** can make a significant difference in points awarded. A **Fixed Points Award** configured to evaluate **each line item in basket** awards points for every qualifying item in the basket.

**Award**

This offer awards  to targeted members

Select points type:

Enter points amount:

### Offer Use Case

Buy a pair of binoculars and get a flat 300 points, with no redemption limit.

If the offer is configured to evaluate **all basket contents**, the system awards 300 points if there are one or more pairs of binoculars in the transaction.

If the offer is configured to evaluate **each line item in basket**, the system awards 300 points for each pair of binoculars in the transaction.

Assume that the member purchases two pairs of binoculars. In this case, the offer evaluating at the line item awards 600 points, while the offer evaluating at the basket level awards 300 points.

	Points Awarded	
	Basket Level Evaluation	Line Item Evaluation
Binoculars	x	300
Binoculars	x	300
Item B	x	
Item D	x	
Item D	x	
<b>Total Points</b>	<b>300</b>	<b>600</b>

### Fixed Point Offers with Redemption Limit

Setting a redemption limit of 1 on the Schedule & Rules page in CRMS mitigates this issue.

However, setting a redemption limit of two (or more) results in the following:

- Given an offer that evaluates **all basket contents**, a member has to complete two independent qualifying transactions. That is, buy at least one pair of binoculars in two separate transactions, to reach the redemption limit for the offer.
- Given an offer that evaluates **each line item in basket**, a member can make a single transaction containing two pairs of binoculars and reach the redemption limit, and earn 600 points.

### Implications on the Microsite and in the CSR Tool

Offers configured to evaluate **all basket contents** display rewards for the entire transaction on the microsite and in the CSR tool.

Offers configured to evaluate **each line item in basket** display each item in the transaction and the points awarded for that item.

## Additional Conditions

Depending on the general option you selected, respond to one of the following:

- To answer the question, "Are there any additional conditions to qualify for this offer?", select one of the following:
  - No

- Yes, offer must be viewed in Offer Showcase.
- Yes, offer must be accepted in Offer Showcase.

## Basket Targeting

Use the Basket Targeting page of the Edit Offer Details wizard to specify the basket profiles to target.

### Define Basket Target

To define the basket target for this offer, respond to one or both of these questions on the Basket Targeting page:

- **Which baskets do you want to target this offer to?**

To limit targeting to one or more selected basket profiles, refer to the instructions for defining the target of an offer by adding basket profiles.

- **Should any baskets be excluded from this offer?**

To choose one or more basket profiles for exclusion, refer to the instructions for defining the target of an offer by excluding basket profiles.

When you have completed the target definition, or want to end your targeting session, click **Next Step**. This saves your work and advances to the next step in the Edit Offer Details workflow, on the Offer Presentation page.

## Defining the target of an offer by adding basket profiles

### Procedure

1. Click **Target only selected basket profiles**.

The Targeting page changes to show two options: **Add Basket Profiles** and a section to include and exclude basket profiles.

2. Add a basket profile, using one of the following options.

- a. To add a basket profile (previously defined) to the list of target:

Click **Add Basket Profiles** to open the Select Profiles page. The profiles you select

with this process are added to the Selected Profiles list.

3. Click **Save**.

4. If you do not want to add more profiles or exclude profiles, click **Next Step**.

This saves your work and opens the next page, Customer Targeting in the Edit Offer Details wizard.

## Including and Excluding Basket Profile

- If you are not familiar with the purpose and definition of a specific basket profile, use the **Target > Basket Profiles** page to check the logical filters applied by the profile and other profile characteristics.
- The default target for an offer is **all baskets**.
- Excluded basket profiles take precedence over targeted basket profiles, regardless of the order in which they were created or added.
- You can view, create, and edit basket profiles by using the features available in the **Target > Basket Profiles** page.
- To make all baskets the target for an offer, do not include or exclude any basket profiles
  - Respond to the question, **Which baskets do you want to target this offer to?** by selecting **Target all Baskets**.
  - Respond to the question, **Should any baskets be excluded from this offer?** by selecting **Exclude No Baskets**.

## Customer Targeting

Use the Targeting page of the Edit Offer Details wizard to specify the set of customers who should be informed about this offer and allowed to redeem this offer.

The Targeting page also provides an estimate of the number of customers in the currently defined target for the offer.

## Customer Target Definition

To make the offer available to all registered customers, use the default settings, All registered customers, and No (that is, no profiles should be excluded); then click **Next Step**.

To refine the customer target for this offer, defining specific targets who are informed about and eligible for this offer, respond to one or both of these questions on the Offer Targeting page:

- **Whom do you want to target this offer to?**

To limit targeting to one or more selected profiles, refer to the instructions for defining the target of an offer by adding customer profiles.

- **Should anyone be excluded from this offer?**

To choose one or more profiles for exclusion, refer to the instructions for defining the target of an offer by excluding customer profiles.

 **Note:**

- Any customers that match the profiles selected for exclusion are excluded from the targeted set of customers, which can include either "All registered customers" or all the profiles you have chosen to target.
- Unregistered customers should not be targeted for offers that require access to the Showcase.

When you have completed the target definition, or want to end your targeting session, click **Next Step**. This saves your work and advances to the next step, Offer Presentation page in the Edit Offer Details workflow.

## Defining the target of an offer by adding customer profile

In response to the question, **Whom do you want to target this offer to?**, follow these steps:

### Procedure

1. Click **Only selected customer profiles or lists**.

The Targeting page changes to show two options, **Add Customer Profiles** and **Add**

**Lists.**

2. Add a customer profile, using one of the following options.
  - a. To add a customer profile (previously defined) to the list of target:  
Click **Add Customer Profiles** to open the Select Customer Profiles page. The profiles you select with this process are added to the Selected Profiles list.
3. Click **Save**.
4. If you do not want to add more customer profiles or exclude customer profiles, click **Next Step**.

This saves your work and opens the next page, Offer Presentation in the Edit Offer Details wizard.

**i Note:** You can select and add customer profiles to build a target and then refine the target further by excluding specific customer profiles from it.

## Defining the target of an offer by excluding customer profile

In response to the question, **Should anyone be excluded from this offer?**, follow these steps:

### Procedure

1. Click **Yes, exclude from selected customer profiles or lists**.

The Targeting page changes to show two options, **Add Customer Profiles** and **Add Lists**, and also an embedded list of any profiles that have already been excluded from this offer. (This is a different instance of a Selected Profiles list.)

**i Note:** When you exclude profiles, only the dimensions of those profiles that have **Customer MUST match above criteria** selected affects the exclusion calculation. The profile chooser window shows you whether a profile has a MUST match dimension defined. Although you can choose to exclude a profile that does not have a MUST match dimension, it has no effect on the exclusion calculation.

2. Add a customer profile, using one of the following options.

- a. To add a customer profile (previously defined) to the list of excluded profiles:  
Click **Add Customer Profiles** to open the Select Profiles page.
  - b. To start the process of creating a new profile and adding it to the list of excluded profiles:  
Select the check box next to the profile you want to exclude and then click **Add Checked**.
3. Add a targeted list:
    - a. Click **Add Lists** to open the Select Lists page.
    - b. Select the check box next to the list you want to exclude and then click **Add Checked**.
  4. Click **Save** or **Next Step** after defining profiles and/or lists to exclude.
  5. If you do not want to add or exclude more profiles, click **Next Step**.  
This saves your work and opens the next page, Offer Presentation, in the Edit Offer Details wizard.

## Including and Excluding Customer Profile

- If you are not familiar with the purpose and definition of a specific profile, use the **Target > Customer Profiles** page to check the logical filters applied by the profile and other profile characteristics.
- The default target for an offer is all registered customers.
- If customers must qualify for an offer by performing an activity, the offer's target must include all registered customers (the default).
- Excluded profiles take precedence over targeted profiles, regardless of the order in which they were created or added.
- You can view, create, and edit profiles by using the features available in the **Target > Customer Profiles** page.
- To make all registered customers targets for an offer, use the default selections:
  - Respond to the question, **Whom do you want to target this offer to?** by selecting All registered customers.
  - Respond to the question, **Should anyone be excluded from this offer?** by

selecting No.

## Presentation

You can specify an image to be associated with the offer in the Presentation page of the Edit Offer Details wizard.

This image is displayed in the Offers section of the Customer's microsite.

Select the **Display this offer in hosted microsite Offer Showcase and Signage widgets** check box.

You can associate a specific image with an offer by using one of the following methods:

- Selecting an existing product image
- Uploading an image.

## Selecting Image from Product Database

### Procedure

1. Type a search keyword into the field and click search to return a list of product images available in the database.

The list is limited to products with that keyword in their name.

2. Click the radio button next to a product in the list to associate the image with your offer.
3. Click **Next Step**.

This saves your work and opens the next page in the Edit Offer Details workflow, Schedule and Rules.

## Selecting a Local Image

### Procedure

1. Click **Browse** under **Browse and upload new media**.

2. Navigate to the image and select it.
3. Click **Upload**.

The image is uploaded and processed for correct sizing by the system, and is then displayed in the matrix of uploaded graphics at the bottom of the page.

**i Note:** When uploading your own files, you must select images that are:

- Roughly square
- At least 400 pixels by 400 pixels
- In JPEG, PNG, or BMP format.

GIFs are acceptable, but produce lower image quality.

4. Click **Next Step**.

This saves your work and opens the next page, Schedule and Rules in the Edit Offer Details workflow.

## Selecting Existing Offer Image

### Procedure

1. To select a previously uploaded graphic, select the radio button associated with a displayed image.
2. Click **Next Step**.

This saves your work and opens the next page, Schedule and Rules in the Edit Offer Details workflow.

## Schedules and Rules

In the Schedules & Rules page, you can define the following criteria for the offer:

- Redemption limits
- Time-frame to restrict redemptions
- Eligibility date

- Qualification dates
- Stores to include or exclude from an offer

### Rules defined for the offer

**Total redemption limit per member:** specifies the number of redemptions of this offer allowed to each customer.

**Offer redemption limit time-frame drop-down:** This drop-down caters to the use case of creating an offer that gives limited number of awards each day/week/month for the entire duration of the offer.

The drop-down field is used to setup the time-frame for the redemption limit. The supported values for the field are **per day**, **per week**, **per month**, and **for Offer Duration**. By default the redemption limit is one. 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.

**! Important: Important:** 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.

For example, if an offer is created with redemption limit 5, offer eligibility dates set to Jan 1- Dec 31 2016 and the time-frame is selected as the eligible drop-down values, following scenarios occur:

- Per Day: When per day is selected in the time-frame drop-down box, it implies that "limit 5 redemption's per day between Jan 1 - Dec 31 2016".
- Per Week: When per week is selected in the time-frame drop-down box, it implies that "limit 5 redemption's per week between Jan 1 - Dec 31 2016".
- Per Month: When per month is selected in the time-frame drop-down box, it implies that "limit 5 redemption's per month between Jan 1 - Dec 31 2016".

**! Important: Important:** 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.

- For Offer Duration: When for offer duration is selected in the time-frame drop-down box, it implies that "limit 5 redemption's between Jan 1 - Dec 31 2016".

**i Note:** By default, the drop-down box populates **for Offer Duration** as the value, because this is the default behavior for each offer. You can change default time-frame accordingly.

**Restrict redemptions to stores:** by default, offers are valid for all store locations. You can select which stores to include or exclude from an offer. For each store, the list includes a check box, the store number, name, and its City and State/province.

A good practice is to limit redemptions. Specifying a limit prevents you from accidentally awarding customers with multiple redemptions. This is especially important when an offer does not require any actions or purchases.

## Defining Schedules and Rules

### Procedure

1. Specify how many times a customer can redeem this offer.  
The default limit is one. Customers can leave this field blank to redeem this offer as many times as they wish without any limit.
2. Limit the offer redemptions to per day, per week, per month, and for offer duration. The default value for the field is for offer duration.

**i Important: Important:** 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.

3. Define the evaluation and qualification dates.  
The time zone for the evaluation and qualification dates is the database server time zone.
4. Specify the retail locations where this offer is valid, using the **Restrict redemption to stores** option.  
By default, offers are valid for all store locations, so if no retail locations are selected, the offer is valid in all locations.
5. Click **Next Step**.  
This saves your work and opens the next page, Summary and Preview in the Edit

Offer Details workflow.

**i Note:** By default, transactions continue to be evaluated 30 days after the offer completion date to cover any delay in processing. If the transaction is sent after the offer end date and the transaction qualifies for the award based on the transaction date, the award is still given. (Contact your account manager if you want to change this default.)

## What's Next

When the definition of an offer passes the basic CRMS error tests and is ready for a review, the next possible steps are presented in a the What's Next? page.

This page includes two options:

- **Create Another Offer** : re-opens the Edit Offer Details wizard.
- **Go to Offers** : submits the offer record and changes its status to pending.

- i Note:**
- Go to Offers is a crucial step in the process of creating an offer. You have to use this option to change the status of an offer from saved to pending. In effect, this option submits a saved offer for approval.
  - Only a CRMS Administrator can approve or deny a pending offer.

Clicking **Go to Offers** is the last step in defining a new offer. (The next step, approving or denying the pending offer, does not change the editable details of an offer.)

If CRMS does not find any errors in an offer record during the final Summary & Preview step of the offer creation or offer details editing process, the technical requirements for that record have been satisfied.

The status of an offer indicates how far the offer has progressed in its normal lifecycle, and how it can be used next.

The current status of each offer is displayed in the Current Offers page, in a control box that is displayed in the left-most column:

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. It met the CRMS technical requirements.
- **Scheduled** : the offer has been approved, and is scheduled to go live. CRMS automatically launches the offer and changes its status to "live" when the Offer Qualify start date arrives.
- **Live** : the approved offer is now live. Customers are currently allowed to qualify for this offer. CRMS automatically ends the offer and changes its status to "completed" at the end of the Offer Qualify end date. In a live offer, some data cannot be edited or changed.
- **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.

## Change Status

The current status of each offer is displayed in the offer status control in the left-most column of each offer record on the Current Offers page.



Use this control to change the status of an offer record. Clicking the down arrow in the offer status control box displays a set of currently available options in a drop-down list.

## Saved to Pending Offer Status

### Procedure

1. Open an offer and navigate to the Summary & Preview page.

For an offer in the Edit Offer Details workflow, click **Jump to Step** pull-down menu and select **Summary & Preview**.

**i Note:** If any step in the offer definition process is not complete, the Summary & Preview page displays an error message. See the listing of each step for a message similar to this: "NOT COMPLETE This step must be completed prior to submission." Click the associated **Edit** button and complete the step as required.

2. Click **Next Step**.

The What's Next? page is displayed.

3. Click **Go to Offers**.

The Offers page opens, listing the status of the offer record you just processed. The status of the record changes from saved to pending.

## Offer Status Options

If Status is	you can select:
pending	approve or deny
scheduled	unapprove or launch
live	complete
inactive	saved

## Changing Offer Status

You can use the offer status control box to change the offer status.

### Procedure

1. In the Offers page, find the offer whose status you want to change.
2. Click the offer status control box to see a list of your current options for changing the status of this offer.

### 3. Select the appropriate option.

The options available in the Status control box change depending on the current status of an offer.

## Offer Status Details

If the current status is pending, you can either approve or deny the offer:

- Selecting approve changes the offer status to pending.
- Selecting deny changes the offer status to inactive.

If the current status is scheduled, you can either unapprove or launch the offer:

- Selecting unapprove changes the offer status back to pending.
- Selecting launch changes the status to live, depending on your scheduled Offer Qualify dates. If the Offer Evaluation start date is today's date (because you manually reset it), you can select launch to request CRMS to make the offer live immediately.

**i Note:** If, previous to the current date, you had defined the start date as today's date, CRMS would have automatically made the offer go live as soon as the current day began.

If the current status is live, then you can complete the offer. Note that CRMS completes the offer automatically, according to the Offer Qualify end date.

- Selecting complete causes the offer to end immediately. The CRMS changes both the Publish end date and the Offer Qualify end date to the current date, and changes the status of the offer to completed.

Normally, CRMS automatically ends the offer at the close of day on the defined Offer Qualify end date. When CRMS ends an offer, it changes the offer status to completed and automatically prevents customers from qualifying for offers.

If the current status is inactive, you can change the status to saved, and then use or modify the offer similar to any other offer in saved status.

For example, suppose you have defined an offer. It has been in "saved" status since the day you started it, and now you want to show it to an associate to get feedback or approval.

From the Edit Offer Details - Summary/Preview page, review all the details with your associate and use the **Preview** option to get a sense of how the offer looks and works. After you approve everything, click **Next Step** at the top of the page. The Edit Offer Details - What's Next? page opens.

To submit the offer, click **Go to Offers**. The Offers page opens, and the **Status** control box shows that your offer's status has changed to "Pending". At this point, if you click the **Status** control, you can "approve" or "deny" your offer. If you approve the offer, CRMS checks the dates you entered for this offer, and changes the status to scheduled.

When an offer is scheduled, you can still unapprove it, which sends it back to pending status.

If the scheduled launch date for the offer is the current date or before, and the Offer Publish and Offer Qualify Stop Dates are still in the future (as defined in the Schedule step for this offer), you can change the status to launch to start the offer immediately. The CRMS changes the status to live to signal that the offer has gone live.

If the Offer Qualify Start Date is still in the future, then CRMS automatically makes the offer go live and changes the status to live when the specified date arrives.

At the end of the Offer Qualify Stop Date (that evening), the status changes to completed.

At any time, a CRMS user can click **Delete** on the Offer record. This changes the status to inactive, and the offer is effectively deleted.

Cloning an offer record creates a copy of the record.

## Cloning an Offer

### Procedure

1. Find the offer record in the Offers page.
2. Click **Clone** in the row of the offer you want to clone.
3. This opens the Edit Offer Details wizard.

## Clone Offer Record

The cloned copy of an offer record includes all of the data in the original, with the following exceptions:

- The clone has a new, unique numerical ID. This is a system requirement.
- The clone of a record named "XXX" is automatically renamed "Copy of XXX." (Note that if you make multiple clones of "XXX", they all are named "Copy of XXX.")
- The Offer Evaluation Start Date is, by default, reset to the date following the day when you create the clone.
- The Offer Evaluation End Date is, by default, always set to a date three months after the initial Offer Evaluation Start date, so this date is also reset.
- The Current Offer Image, which is normally selected in the **Edit Offer Details > Presentation** step, is typically left blank in the clone. You must select the image to be associated with the cloned offer record.

Here are some tips for using a cloned offer record to create a new offer:

- Start by assigning the cloned copy its own new, unique, descriptive name.
- Start work on a clone with the first page, and update all existing fields to clearly distinguish the new offer from the source material offer.
- Review every field.
- You must add a new image, because any image associated with the original offer has been deleted.
- Check the Publish and Qualify dates; in a clone, these are set to default dates.

## Deleting Offer

### Procedure

1. In the Current Offers page, click **Delete** in the row of the offer record you want to delete.

This opens a dialog box asking "Are you sure you want to delete this offer?"

2. Click **OK**.

## Result

This automatically changes the status of the offer to inactive. The status of such inactivated records can be changed to "saved", and then the record behaves as any other with saved status. The record is not removed and inactive records are retained. You can change the status of an inactive record to saved, and then the record can be used just as any other in saved status.

**Warning!** Deleting or modifying a published offer can cause unexpected consequences. Consult Reward account management for your specific needs.

Deleting an offer automatically changes the status of the offer to "inactive."

**i Note:** You cannot delete a live offer until the status is completed or until the Eligibility Evaluation period has ended (that is, the offer has expired).

# Award Options

## Award Types

You can use Reward's CRMS to give the following types of awards to targeted customers:

### Points

Use this award type to specify the number of points, which are awarded to qualifying customers, once per qualification, unless redemptions are limited. (Limiting redemptions is a good practice.) You can maintain only one set of points. All offers must use the same point system. When you select this option, you must specify the number of points to be awarded to the qualifying, targeted member. Enter this information in the **Enter Points Amount** text-entry box.

### Points Up to Member Point Limit

Use to create an offer that gives the customer a fixed-point award up to a number of points based on the member's Point Award Limit. Note that this is only enabled when a

**Member Point Limit** has been enabled. (This is set up using **Admin > Main Settings > Configuration Management > Member Point Limit**.)

### Points Per Event Value

Awards the “number of points that a customer receives for each Event Value” multiplied by the event value. For example:

- Award Type: **Points per Event Value**
- Number of points that a customer receives for each Event Value: 10
- Event value that is passed to LL via API or file import: 5
- Points awarded: 50 (10x5)

### Double Points

Use **Double Points** to award double points to customers on purchases. **Double points** look at the rate for your current points program and adds a bonus award based on the current program rate. If the qualifying customer normally receives 1 point per monetary unit according to your current loyalty program rate, selecting **Double Points** causes that customer to receive 2 points per monetary unit.

### Triple Points

Use **Triple Points** to award triple points to customers on purchases. **Triple points** looks at the rate for your current points program and adds a bonus award based on the current program rate.

### Points Per monetary unit

Use **Points Per monetary unit** to define an additional, different point-earning rate on customer purchases for a limited period of time (the offer qualification period). You can use the **Custom points** option to enter the number of points that a customer receives for each monetary unit spent.

### Percentage off (% Off on purchase)

Use **Percentage off** to take a specific percentage, for example 10%, off on the products or categories selected. Available only if the customer qualifies by purchasing “a number of monetary units “ or “a number of items” of selected products or categories.

### Monetary Units off (%money Off on a Purchase)

Use **Monetary Units off** to take a specific monetary unit amount, for example, 10 monetary units off, on the products or categories selected. Available only if the customer qualifies by purchasing “a number of monetary units “ or “a number of items” of selected products or categories.

### Bonus

Use **Bonus** to specify an award you fulfill offline, such as sending a gift card or a certificate. If you select this option, a **Description** field is displayed, and you must enter text to describe the bonus.

### Sweepstakes Entry

Customers use **Sweepstakes Entry** to enter into a contest. Contest entries are provided to the client for the eventual selection of a winner. If you select this option, a **Description** field is displayed, for you to enter text describing the sweepstakes entry.

**i Note:** Award options are always limited to those that are still logically viable. For example, as soon as you decide whether a purchase or an activity qualifies a customer for the offer, CRMS limits the set of award options available depending on the qualification type. Thus, if you indicate that no purchase is required, the option to award an immediate “**Percentage off**” purchase discount is no longer available.

The purchase options you select can also change the award options available.

The types of awards that you can offer depend on the qualification and purchase type options that you select.

If you want to offer a certain type of award, find that award in the table, note the columns containing an X, and refer up to the qualification options and purchase type options that are required.

For example, to offer double points, you must select the following:

- All targeted members who make a purchase as the qualification option
- Any number of items as the purchase type option

## Criteria for Offering Awards

This table indicates which awards you can offer based on the other settings.

Qualification options	All targeted members who make a purchase		All targeted members who perform an activity	All targeted members
Purchase type options	Any number of items	A number of items OR a number of monetary units		
Award options				
% Off on purchase		X		
money Off on a Purchase		X		
Points	X	X	X	X
Points UP TO member Point Limit	X	X	X	X
Bonus	X	X	X	X
Points Per monetary unit on purchase [on selected products and on products in selected categories]	X			

**i Note:** Award options are always limited to those that are still logically viable. For example, as soon as you decide whether a purchase or an activity qualifies a customer for the offer, CRMS limits the set of award options available for you to select from. Thus, if you indicate that no purchase is required, the option to award an immediate "**Percentage off**" purchase discount is no longer available, but you can still choose to give a targeted customer a rebate as an award for completing an activity.

# Returns

When CRMS receives a return transaction, the following takes place:

1. The unique identifier that is used by the merchant and included in the transaction file (email, member ID, and so on) is used to identify the program member in the Reward system.
2. After the member is identified, the system looks at all previous transactions by that member to see if there is a purchase transaction for an item (SKU) that is the same as the item that is returned.
3. If a matching item or SKU is found, the system looks at all offers that the user and item or SKU could have qualified for on the date the item was purchased.
4. For a matching offer or award on that date for that item or SKU, the system calculates the reward based on the offer or award and generates a reversal for the amount of the reward.
5. The return transaction and the reversal amount are then available through the CSR, Microsite, and various APIs.

# Loyalty

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Loyalty is a recognition program.

## Topics:

- [Refer a Friend](#)

## Refer a Friend

This section provides information about Refer a Friend functionality.

### About Refer a Friend

The Refer a Friend function rewards customers with points for providing referrals to your program.

To present your customers with a new Refer a Friend program, two steps must be completed:

1. Your company must request that a Refer a Friend component be added to their microsite during the initial Loyalty program setup process. This establishes the basic location for the Refer A Friend component.
2. You must define the details of your Refer a Friend program on the Configure Refer a Friend page. When you set the Refer A Friend status to Enabled, the text intended for customers is displayed on the Refer a Friend location in your microsite, and the program takes effect.

### Configuring Refer a Friend

#### Procedure

1. Navigate to **Loyalty > Refer a Friend**.

2. Click **Configure Refer a Friend**.
3. In the Configure Refer a Friend page, enter the external program name that is displayed as the title of your Refer A Friend program.
4. In the **Description** field, enter a description that prompts your customers to refer their friends.
5. In the **How it Works** field, describe what your customers are rewarded if they refer friends.
6. In the **Terms & Conditions** text box, describe any rules or legal information about the program.
7. Set the **Awards & Limits** by selecting the appropriate radio buttons. See [Award & Limits Options](#) for more information.
8. Optionally, you can upload an image in the Upload an Image for your Refer a Friend program section. To do so, click **Browse** to find the image and then click **Upload**.  
Image Requirements:
  - JPG, PNG, BMP, GIF formats
  - File size must be less than 1MB
9. Click **Done**.
10. In the Configure Refer a Friend page, set the **Status** to Enabled to make the feature available to customers.
11. Alternatively, set the **Status** to Disabled to hide the feature from your customers.

**Note:**

- Clicking **Disable** can cause an existing Refer a Friend site to suddenly be displayed empty.
- If you are currently supporting a Refer a Friend page, and wish to discontinue it for some time, contact Reward Customer Loyalty Management for assistance.
- As a rule, you should not change this setting from Enabled to Disabled until you have consulted Reward Account Management.

# Target

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This section provides information about targeting.

**Topics:**

- [Customer Profiles](#)
- [Customer Profile Editor](#)
- [Creating Customer Profile](#)
- [Existing Customer Profile](#)
- [Editing Customer Profile](#)
- [Cloning Customer Profile](#)
- [Exporting List](#)
- [Deleting Customer Profile](#)
- [Profile Dimensions](#)
- [Basket Profiles](#)
- [Lists](#)
- [Postal Codes](#)
- [Custom Questions](#)
- [Mobile Geolocations](#)

## 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 by 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.

**i 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: Dimensions

A customer profile is defined by a set of dimensions. For each customer profile, you can select the dimensions to use, and then set the parameters for each dimension. One dimension is always selected by default: **Customer Type**.

Customer profiles are often composed of multiple dimensions that are used together. You can use multiple dimensions 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 dimensions it uses and how these dimensions are defined for that profile.

## Customer Profile: List Page

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

## Profiles Page Features

- Click **Create > New Target Customer Profile** to start the Create New Target Profile process.
- The Manage Customer Profiles panel includes the following:
  - Standard navigation controls (the **Show** filter and the **1 2 3** page control)
  - The complete list of customer profile records.

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:

### # (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.

### Profile Name

The name of the customer profile as defined in CRMS, and set up as a hyperlink to the customer profile record. Click the customer profile name to open the record, either to see or edit its details.

### Attributes

This column shows abbreviations for the dimensions used to define the profile. For example, if you define a customer profile to use gender and category interests as criteria, the abbreviations GND and CAT would be listed as attributes for that profile record.

### 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 Manage Customer Profiles page, the most recently updated customer profile records are displayed first.

The following functions are supported:

- **Clone** : you can clone the associated customer profile record.
- **Export Email** : you can generate a CSV list of opted-in customers with valid email addresses that meet the logical requirements of the associated customer profile.

- **Delete** : you can delete the associated customer profile record.

Use the Customer Profiles page to do the following:

- Create a new customer profile
- Clone a customer profile
- Delete a customer profile
- Edit an existing customer profile
- Export an email based on a customer profile.

## Customer Profile Editor

From the **Target > Customer Profiles** page, click **Create > New Target Customer Profile**.

This generates a new customer profile record and opens that record in the profile editor.

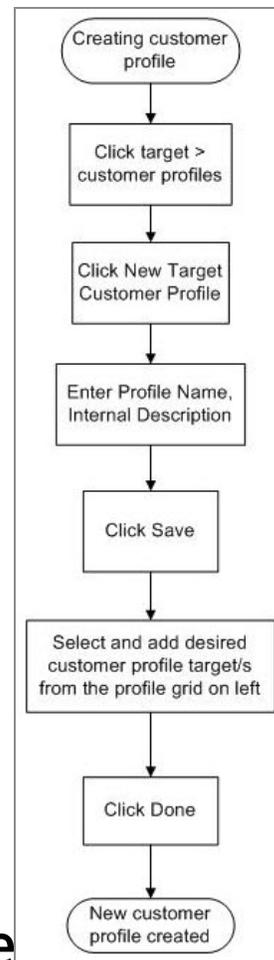
You can also open this editor from the Edit Offer Details wizard of the Offer Targeting page.

When the profile editor opens, it displays the following:

- In the left hand column, a complete list of the dimensions that you can use to define a customer profile. The dimensions defined for the current customer profile are highlighted with a small green button. Dimensions with a black button are not used in the currently defined profile.

One exception is: the **Customer Type** dimension is always applied, even though the button remains black when the default type, **Registered customers only**, is selected. **Customer Type** defines the population that is used as the starting basis. If no other selections are made during the customer profile creation, registered customers are targeted by default.

- The **Profile Name** is the unique name for this customer profile that is displayed on the **Target > Customer Profiles** page.
- The **Internal Description** for the customer profile summarizes the crucial dimensions of the customer profile so that potential users can quickly determine its purpose without opening each currently defined customer profile dimension to see how it is set up.



## Creating Customer Profile

### Procedure

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

When the new page opens, a new customer profile record is created, the **Profile Description** option is selected, and the Profile Description configuration panel is open.

2. Specify a name and description for the new customer profile record.
  - a. In the **Profile Name** field, enter a name that is unique and succinct.
  - b. In the **Internal Description** field, provide internal notes. (optional).
3. Click **Save**.
4. Click the name of a profile dimension that you wish to apply with the current customer profile, and define the details of that dimension.

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

5. After you have defined a dimension, click **Save**.

**Warning!** Do not click another dimension until you have clicked **Save** on the current one you are working on, otherwise you lose any unsaved work on a dimension.

6. Repeat steps 4 and 5 for each dimension you want to define for the profile.
7. When you finish defining all the dimensions for the profile, click **Done** to save and close the profile.

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

## Existing Customer Profile

To open an existing customer profile record for editing, start **Target > Customer Profiles** page, and click the profile name associated with the record. The Profile editor opens, displaying the following:

- In the left-hand column, a complete list of the dimensions you can use to define a profile. The dimensions defined for the current profile are highlighted with a small green button. Dimensions with a black button are not used in the currently defined profiles. See [Customer Profile: Dimensions](#) for detailed information about each listed dimension and how to work with it.
- The **Profile Name**. This is the unique name for this profile that is displayed on the **Target > Customer Profiles** page.
- The **Internal Description** for the profile. This summarizes the crucial dimensions of the profile so that potential users can quickly determine its purpose without opening each currently defined profile dimension to see how it is set up.

# Editing Customer Profile

## Procedure

1. In the **Target > Customer Profiles** page, click the profile name of the record you want to edit.

When the profile record opens, the **Profile Description** option is selected, and the Profile Description 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 **Profile Name** field, enter a name that is unique and succinct.
- b. In the **Internal Description** field, provide internal notes (optional).

3. Click **Save**.

4. Click the name of a targeting dimension that you wish to define for the current profile, and specify the details of that dimension.

When you click the name of a dimension, the corresponding dimension configuration panel is displayed. This panel provides the tools you can use to define the details of the dimension (also known as the "conditions" of the dimension). Each dimension configuration panel provides different tools. For details about the different dimensions, their configuration panels and tools, and how to apply them, see [Profile Dimension: Definitions](#).

5. When you finish defining a dimension, click **Save**.

**i Note:** The best practice is to click **Save** after defining each condition associated with a dimension, that is, after you complete any subtask in the course of defining a dimension. Do not click another dimension until you have clicked **Save**, otherwise you lose any unsaved work on a dimension. Do not click **Done** unless you want to save and close the current profile with all the dimensions in their current state.

6. Repeat steps 4 and 5 for each dimension you want to define for the profile.
7. When you finish defining all the dimensions for the profile, click **Done** to save and close the profile.

## Result

The **Target > Customer Profiles** page is displayed again, and the **Profile Attributes** column reflects any new or deleted dimensions in the profile you worked on.

**i Note:** Do not click **Done** until you have finished the process of defining all the dimensions or you want to end the session in its current state.

# 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 record 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". Note, however, that if you make multiple clones of "XXX", they are all named "Copy of XXX."
- The **Profile Updated** date is, by default, reset to the date when you create the clone.

Here 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 **Profile Name** and **Internal Description**.
- As you edit a clone, make sure the **Internal Description** accurately reflects the dimensions and parameters you have defined. Before you click **Done**, review and update the **Profile Name** and **Internal Description** to ensure that they reflect the purpose and contents of the new profile.
- If you must stop working on a profile before it is completely defined, you might want to note its status. Applying even an informal system of version and

revision tracking can help you save time and improve your profiles.

## Exporting List

Each profile record listed in the **Target > Customer Profiles** page includes the **Export Email** option. You can use this option to generate a CSV list of opted-in customers with valid email addresses who meet the logical requirements of the associated profile.

### Procedure

1. Select **Target > Customer Profiles**.

This opens a page of existing customer profiles.

2. Click **Export Email** on the row of the customer profile, from which you want to export email.

A message is displayed stating that only profiles that contain at least one parameter with "**MUST Match**" option selected are used. Also, in the dialog is a question asking if you want to continue with the process.

3. Click **OK**.

The email list is sent to your organization's FTP site.

#### **Note:**

- You can only export emails from profiles that contain at least one **MUST Match** parameter. The **MUST Match** parameters are used to select the email addresses.
- If you add a new postal code set today and target to that postal code, the email addresses corresponding to that postal code set are not included in an export file until the next day. Email Export files do not include the results of postal code sets added within the last 24 hours.
- TIBCO Reward supports export files of up to one million records in size. If you suspect that your export email files for a profile are larger than this size, contact your TIBCO Reward Client Services Representative to ensure correct processing.

## Export Email File Format

The Export Email file that you generate has the following format (except that the actual list includes no spaces between values, only commas):

FileExportId, RegistrationDate, LoyaltyLabCreationDate, ShopperStatus,  
LoyaltyMember, SourceOfChange, ShopperId,

LoyaltyLabShopperId, FirstName, MiddleName, LastName, AddressLine1, AddressLine2,  
City, State/Province, PostalCode, Email,

EmailOptIn, PhoneNumber, LoyaltyCardNumber, TierName, TierJoinDate,  
StatusUpdateDateTime, PointBalance

## List Export Headers

The following table contains the sample shopper data from an exported email list. Sample shopper data is aligned with the Export Field Headers.

Export Field Headers	Shopper Data
FileExportId	2701
RegistrationDate	2012-06-05
LoyaltyLabCreationDate	2012-05-13
ShopperStatus	A
LoyaltyMember	1
SourceOfChange	Other
ShopperId	20620633
LoyaltyLabShopperId	45442664
FirstName	Tom

Export Field Headers	Shopper Data
MiddleName	""
LastName	Jones
AddressLine1	1313 Main Street
AddressLine2	""
City	Springfield
State/Province	MO
Zip/PostalCode	65802
Email	TJ@hotmail.com
EmailOptIn	1
PhoneNumber	555-5555
LoyaltyCardNumber	""
TierName	""
TierJoinDate	1900-01-01 00:00:00.000
StatusUpdateDateTime	2012-05-13 16:53:31.160
PointBalance	.0000

## Profile Export Fields with Custom Attributes

Custom attributes are extensions to the customer or product record. They are additional data fields that can be used to store non-standard data.

The customer attribute data exports in pairs -- custom attribute name followed by the value. This format holds for each of the four types of attributes:

- Data/Time
- Numeric
- Lookup
- Text

The following table shows Custom Attribute Headers and their description for a sample client. (Custom attributes and profile data vary based on client customization.)

Custom Attribute Header	Description
CustomDateTimeValueLastChangedDateTime	The last time a custom date field was changed for this customer, cumulative across all custom date/time fields.
CustomDateTimeName1 CustomDateTimeValue1 to CustomDateTimeName20 CustomDateTimeValue20	The name of the date/time custom attribute and The value of the date/time custom attribute.
CustomNumericValueLastChangedDateTime	The last time a custom numeric field was changed for this customer, cumulative across all custom numeric fields.
CustomNumericName1 CustomNumericValue1 to CustomNumericName20 CustomNumericValue20	The name of the numeric custom attribute. and the value of the numeric custom attribute for this customer.
CustomLookupValueLastChangedDateTime	The last time a custom lookup field was changed for this customer, cumulative across all custom lookup fields.

Custom Attribute Header	Description
CustomLookupName1	The name of the lookup custom attribute and the value of the lookup custom attribute.
CustomLookupValue1	
to	
CustomLookupName20	
CustomLookupValue20	
CustomTextValueLastChangedDateTime	The last time a custom text field was changed for this customer, cumulative across all custom text fields.
CustomTextName1	The name of the text custom attribute for this customer and the value of the text custom attribute for this customer.
CustomTextValue1	
to	
CustomTextName20	
CustomTextValue20	



**Note:** Even if the client is not using all attributes, the name and value pair are displayed in the table.

## 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, which reads, "Are you sure you want to delete this

profile?".

3. Click **OK** to delete the selected record.

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

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

## Profile Dimensions

### About Profile Dimensions

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

You can use many different types of dimensions, including: **Activities, Past Purchases, Category Interests, Geographic Location, Gender, Custom Questions, Customers types, Customer Attributes, and Tiers**. For details about each dimension and how to use it, see [Profile Dimension: Definitions](#).

When defined and activated, a dimension 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 dimension also changes over time. The targeted segment is defined dynamically.

**i Note:** When you define a dimension in CRMS, it serves as a dynamic customer segmentation tool. When defined and applied as part of a target profile, a defined dimension can be applied repeatedly to an evolving current customer population base. Each time the dimension 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 dimension 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.

If the set of customers selected by a profile does change after an offer is sent to the initially qualified set of targeted customers, then CRMS sends offers to the customers added to the set on subsequent days, for as long as the offer is open.

## Profile Dimension: Conditions

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

When setting up a profile, click the name of a dimension you want to use in that profile, and the corresponding dimension configuration panel is displayed. This panel provides the tools you use to define the details of the dimension (also known as the "conditions" of the dimension).

A dimension can have one or many conditions. Each defined condition constrains the dimension, just as each dimension constrains the profile.

## Default Dimension: Customer Type = Registered Customers Only

To establish the broad customer population that the profile uses as its basis, one dimension is always applied by default: **Customer Types**. By default, too, the customer type selection is always set to **Registered Customers Only**. Other customer types can be selected.

The customer types dimension is not selected when the default population, **Registered Customers Only**, is selected. However, this default category type does constitute a logical selection that is applied as a **MUST match** dimension to filter the population.

## Profile Dimension: How to Use

When you create a new profile or edit an existing target profile, you must select and define the dimensions that this profile uses.

Clicking on a customer profile name in the **Target > Customer Profiles** page opens that profile and provides access to the specific dimension settings associated with that profile.

For general information about dimensions and how to use them, see [Profile Dimensions](#).

 **Note:** Click **Save** frequently when creating or editing profile dimensions. If you are working with a given dimension definition and attempt to open a different dimension without first saving your work, the unsaved work is lost. If you are working on the definition of one condition in a dimension and attempt to open a different condition, your unsaved work on that condition is lost.

## Profile Dimension: MUST Match

When editing a targeting dimension, you have the option of enabling or disabling **MUST Match** for that dimension. When this option is selected, only customers who exactly match the selected profile dimension criteria are included whenever this profile is used. For example, if Recency 1-3 weeks is selected in the **RFM** sub-tab, and **MUST Match** is selected, this profile never goes to anyone who did not make a purchase transaction in the last 1-3 weeks. That is, any other recency and those whose recency is unknown are not included in this profile.

When this option is not selected, the result depends on where the profile is used. In Offers, the selected profile criteria influences the offer score, but does not exclude anyone from receiving the offer. (Remember that offers are scored on relevance.) In email, this check box is treated as though it is selected and all sub-tab criteria are treated as **MUST Match**.

Each dimension within the profile has its own **MUST Match** setting. This means checked and unchecked dimensions can be mixed to fine tune offer targeting. For example, setting Recency =1-3 weeks as **Must match**, and gender = male as not **MUST match** results in only customers with a purchase transaction in the last 1-3 weeks receiving an offer, with men scoring high and women scoring low. If the same profile is used for email, only male customers with a purchase transaction in the last 1-3 weeks receive the email."

# Profile Dimension: Definitions

## Dimension: Activities

Use this dimension to select customers based on whether they did or did not perform an activity (for example, a task that can be completed on a website).

If a customer either performed or did not perform a defined activity, you can define the **Activity Events** dimension such that either alternative satisfies a condition. You can use one or many activities to set up one or many conditions for this dimension.

You can create a valid **Activity Events** dimension by setting up one or many requirements. Before you define this dimension, review the logical case for targeting customers on the basis of activity events.

## Defining Activity Based Conditions

### Procedure

1. Select the check box in front of the first activity you want to test for.

When this check box is selected, the default requirement, Performed, is selected and the radio button in the **Performed** column is selected.

- If you want to select customers who performed this activity, leave the **Performed** button selected.
  - If you specifically want to select customers who did not perform this activity, select the radio button in the **Did Not Perform** column.
2. If you do want to test for either performance or non-performance of an activity, make sure the check box in front of the activity name is not selected.
  3. Click **Save**.
  4. Advance to the next activity that you want to use as a condition and repeat steps 1 through 3, until you have finished defining the desired behavior with respect to all activities of interest.

5. Select or clear **Customer MUST match** check box, as appropriate.
6. Click **Save**.

## Dimension: Category Interests

Specify product categories in which the customer has expressed interest (for example, in the survey). Clicking **Add Categories** brings up the Select Categories dialog box. The categories are derived from the product file sent to Reward. This is the same list that customers use to identify their category interests.

## Targeting Customers in Categories

### Procedure

1. Click **Add Categories**.  
The Select Categories dialog box is displayed.
2. Select all of the categories in which the targeted customers should have expressed interest and click **Add Checked**.  
The Category Interests configuration panel is displayed again with the selected categories listed.
3. Select or clear the **Customer MUST match** check box, as appropriate.
4. Click **Save**.

## Dimension: Custom Attributes

You can use the **Custom Attributes** dimension 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 dimension 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 dimension.

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 > Custom Attributes** tab. You can target as many of your custom attributes as you like, but you can only target each only 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.

## Defining Dimension Conditions Based on Custom Attributes

### Procedure

1. From the **Add a Custom Attribute** drop-down menu, choose the attribute you want to use for the current profile.

All the attributes that you have defined are displayed in this menu, with the exception of Lookup type attributes that have no Lookup codes defined. Also, because you can target each attribute only once within any given profile, after you add an attribute to target to, it is removed from the menu.

When added, each attribute is displayed within its own configuration panel. When you initially add an attribute to target, it is displayed in expanded mode.

2. Configure the values associated with the attribute and click **Update** to save your changes.

To save your work, click **Save**. Your input is saved and the page is refreshed, displaying the attribute panel in collapsed mode.

3. If you want to define another custom attribute condition, choose another attribute from the **Add a Custom Attribute** drop-down menu, and repeat step 2.

## Editing a Condition Based on a Custom Attribute

### Procedure

1. Click **Save** to save any existing work.
2. Click the **Edit** button associated with the custom attribute.

The collapsed panel is expanded. Only one attribute can be expanded and edited at a time. If you expand a block while editing another, you lose any input in the one you

were previously editing.

3. Configure the values associated with the attribute and click **Update** to save your changes.

**i** **Note:** If you attempt to set up a new attribute while editing one, your work is lost. Before adding a new attribute, be sure to click **Update** or **Save**.

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

## Dimension: Custom Entities

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 as well.

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 want to target from the **Add a Custom Entity** pull-down 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 removed from the **Add a Custom Entity** menu.

To get started:

Choose the custom entity you want to target from the **Add a Custom Entity** pull-down menu.

When a custom entity is added, the custom entity name along with an **Add an Entity Attribute** pull-down menu for its associated attributes is displayed within a "block" on screen (with the exception of **Lookup type** attributes that have no **Lookup codes** defined). Choose the entity attribute you want to target from this pull-down menu.

Also, when you initially add an entity attribute for the custom entity to target, it is displayed in expanded mode so that you can configure its values. After you have configured the entity attribute, click the **Update** button to save your changes for that attribute.

If you click **Save** at the top of the screen, your input is saved and the page is refreshed, displaying the custom entity with its attributes in collapsed mode.

You can always edit a collapsed custom entity or its attributes by clicking the **Edit** button. Only one custom entity or entity attribute can be expanded and edited at a time. Also, be sure to click **Update** on the block, or **Save**, before adding a new entity attribute.

**i Note:** If you add a new entity attribute for a custom entity while editing one, you lose your work.

## Dimension: Custom Questions

Your company can survey customers by presenting them with **Custom Questions** in the My Account section. If a customer responded to a custom question, you can define the custom question dimension such that the response satisfies a condition. You can use one or many questions to set up one or many conditions for this dimension.

You can use this dimension to process customer responses to custom questions in several different ways.

Note the following general guidelines about custom questions:

- You can set up the required responses to one or more questions.
- You must set up a required response to at least one question to create a valid dimension. If you do not define any required response to any question at any level, this dimension has no conditions and serves no purpose.
- You can satisfy the condition associated with any question at two different levels. See details about Level I and Level II.
- For each question, you can set up the required response at either level.

## Setting up Customer Response at Level I

To require only some response to a question, the customer can respond to the question in any way.

### Procedure

1. Select the check box in front of the question, at the top level.

When this box is selected AND no details about responses are provided, a customer automatically satisfies the condition by responding to this question in any way. To verify that no specific customer choices need to be provided, click **Show Answers** to see the question response details. If all responses are checked as **Disabled**, you have required no specific response. This means that a customer automatically satisfies the condition if that customer makes any selection in response to this question.

Suppose you want to use this dimension to determine if a customer has children. If customers provide any response to a custom question regarding the characteristics of their children, this can be taken as an indication that they have children. Any response satisfies the implicit condition (customer has child or children), and specific details are not significant, given your level of interest.

2. Click **Save**.
3. Proceed to the next question that you want to use as a condition.  
Note that you can define the required response at either Level I or II.
4. After you have defined the desired responses to the custom questions of interest to you, click **Save**.
5. Select or clear the **Customer MUST match** check box, as appropriate.
6. Click **Save**.

## Setting up Customer Response at Level II

To require some specific response to a question, set up one or more possible responses for a custom question.

### Procedure

1. At the right-hand side of the bar containing the custom question, click **Show Answers**. The question response details are displayed at a lower level.

Each possible response of the question is listed. (Multiple option selections are normal in a survey question.)

2. Select the question responses you want to use.
  - a. If an unselected response to a line item is significant and should satisfy the condition, select the unselected box.

Suppose you want to set up a condition to help determine whether it is appropriate to call a set of customers about a new offer. You can use the **Custom Question** dimension to determine whether the customer has explicitly asked not to be contacted about new offers.

For the sake of this example, assume that one of your custom questions is "**How would you like to be contacted?**" and that one of the possible responses is "**Do not contact me.**" (This is a standard questions-and-response pair among customer questions.)

Your setup for this custom question stipulates the condition that this "**Do not contact**" response is not selected. Thus, when the customer has not used this specific method to direct you not to call, the customer meets the condition.

- a. If a selected response to a line item is significant and should satisfy the condition, select **Selected box**.

Suppose you want to use this dimension to determine if a customer has children who might use infant diapers. There is a custom question that surveys customers about the ages of their children, so you select the option labeled "**Birth - 2 years.**" The customers who select this response meet the condition. Other responses are not of interest, so you do not need to select any response or even enable the response.

- a. If any response to a line item should satisfy the condition, you can click **Either**. The **Enable** box might be automatically selected. If you decide that a response to this line item is not a factor, clear the **Enable** box, or leave a **Disable** box selected.

3. Click **Save**.
4. Advance to the next question that you want to use as a condition.

Note that you can define the required response at either Level I or II. Refer to the instructions for defining a required response at Level I.

5. After you have defined the desired responses to the custom questions of interest, click **Save**.

6. Select or clear the **Customer MUST match** check box, as appropriate.
7. Click **Save**.

Because all conditions based on custom question responses are linked with the logical AND operator, the outcome of this dimension is the set of customers who meet all of your question response requirements. Requiring specific responses to multiple custom questions can yield a very narrow customer segment. Note also that, if a customer response to a custom question is not strictly required, only a subset of the population might provide any response.

If you set up a condition based on a custom question response that does not make sense, the CRMS cannot interpret questions, possible responses, and your application of the dimension logic. So you must test the logical condition you are defining.

## Dimension: Customer Types

You can use this dimension to target the following broad categories of customers:

### All Customers

Includes registered and unregistered customers.

### Registered customers only

Customers who have enrolled in your loyalty program.

### Unregistered customers only

Customers who have not enrolled in your loyalty program, but who have provided enough information to be tracked by the Reward system.

### Unsubscribed customers only

Loyalty program members who have opted-out of marketing email. (Note: Should only be used for changes to contractual terms and conditions, or other legally required email notifications.)

Be aware that the **Customer Type** selection is always administered as a **MUST Match** requirement.

To select a customer type:

1. Select one type by clicking the associated radio button.

## 2. Click **Save**.

### Notes:

- If you click **Registered Customers Only**, CRMS does not indicate that you have selected a **Customer Type**. If you click any other option, the normal dimension indicators are activated.
- This dimension is always defined as a **MUST Match** condition, by default.
- Do not choose **Unsubscribed Customers Only** unless you have validated that you have a legal rationale for targeting this customer group.
- In general, The **Unsubscribed Customers Only** (opted-out) customer type dimension should only be used to target offers to unsubscribed program members, for example: “sign up for marketing emails and receive 50 points.”

Some dimensions apply logical conditions that require data provided only by registered customers. The following dimensions only function with registered customers:

- **RFM**
- **Categories of Interest**
- **Gender** (from Sign up and My Account)\*
- **Customer Questions**
- **Tiers**

**i** **Note:** Gender based targeting can also select unregistered customers identified in files supplied by clients to Reward (example, customer or transaction files), if those files include gender data and if appropriate Reward system integration has been completed.

Although you can apply the dimensions when customer type is set to **All Customers**, selecting that option does not increase or change the customers selected, because all of the listed dimensions are based on data provided only by registered customers.

**Warning!** If you apply any of the profile dimensions when customer type is set to **Unregistered Customers Only**, zero (0) customers are selected by that dimension because the logical result is a null set.

## Dimension: Gender

Use the **Gender** dimension to select customers according to their gender attribute.

Reward can collect the gender data for a client's customers from different sources: the data files provided by the client, the loyalty program sign-up forms, and the data provided by customers in their My Account forms.

Gender is commonly determined from sign up or My Account forms by interpreting the salutation data (Mr., Mrs., Miss, Ms., and so on) provided by the customer in the sign-up process. If the salutation is not defined as a required field, then gender information might not be available for many customers.

If no source of gender data other than the sign-up and My Account forms data has been made available to TIBCO Reward, only those customers who have indicated their gender in their salutation can meet a gender based condition. Note, however, that a gender attribute might be included in customer files or transaction files provided to TIBCO Reward.

## Targeting Customers by Gender

### Procedure

1. Select one gender or either, by clicking on the associated radio button.
2. Click **Save**.
3. Select or clear the **Customer MUST match** check box, as appropriate.
4. Click **Save**.

## Dimension: Generic Events

The **Generic Event** targeting provides you flexibility to 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:

- You can 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 who performed the action on any one specific product, a group of products, or any product in your product catalog.

- If **Event Value** is enabled for the event, you must enter a value that is 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 Generic Event Target Profile

### Procedure

1. Click the **Target > Customer Profiles** tab. The Manage Customer Profiles page is displayed.
2. In the Manage Customer Profiles page, click **Create New Target Customer Profile**. The Description page is displayed.
3. Provide a name and description for the new profile and click **Save**.
4. Click **Generic Events**. The Generic Event Targeting page is displayed.
5. Select a **Generic Event Condition** from the drop-down menu and click **Add**. The options that are displayed on the page are determined by the way the event was set up.
6. Select the event occurrence values. (Note that event occurrence values change dynamically based on your selections.)
7. Enter a numerical event value, if available.
8. If the object is a product, specify whether the event applies to any product or one specific product.
9. Click **Save** to save your changes, or click **Done** to save your work and close the session.

After you have created a customer generic event profile, you can associate the profile with an offer, by which 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.

## Dimension: Geographic

Use the **Geographic** dimension to designate the desired geographic location for customers. The **Define Geographic Targeting** drop-down menu offers these options for selecting geographic areas:

### Geographic Targeting Using Postal Code Sets

#### Procedure

1. Select **Postal Code Sets** from the **Define Geographic Targeting** drop-down menu.
2. The corresponding configuration panel is displayed with a list of postal code sets, stores, or metropolitan areas.
3. Select or clear the **Customer must match** check box, as appropriate.
4. Click **Save**.

### Geographic Targeting Using U.S. States

#### Procedure

1. Select U.S. states from the **Define Geographic Targeting** drop-down menu.  
The corresponding configuration panel opens, displaying a drop-down list of U.S. states.
2. Select one or more states from the list of states in the panel under **Target customers that have zip/postal code in selected states/provinces**.
3. Select or clear the **Customer MUST match** check box, as appropriate.
4. Click **Save**.

## Geographic Targeting Using Stores

### Procedure

1. Select **Stores** from the **Define geographic targeting using** drop-down list.  
The corresponding configuration panel opens, displaying a list of stores.
2. Select stores by using check boxes.
3. Select or clear the **Customer Must match** check box, as appropriate.
4. Click **Save**.

## Geographic Targeting Using Metro Area

### Procedure

1. Select **Metro Area** from the **Define geographic targeting using** drop-down menu.  
The corresponding configuration panel opens, displaying metro areas.
2. Select metro areas by using the check boxes.
3. Select or clear the **Customer Must match** check box, as appropriate.
4. Click **Save**.

## Geographic Targeting Using Mobile Geolocation

You must create mobile geolocations before targeting them.

### Procedure

1. Select **Mobile Geolocation** from the **Define Geographic Targeting** drop-down menu.
2. Click **Add Mobile Geolocations**.  
This displays the **Select Mobile Geolocation** list.
3. Select the check box next to the appropriate geolocation.
4. Click **Add Checked**.
5. Click **Save**.

## Dimension: Lists

You can use **Lists** targeting dimension to target customers who are members of one or more lists. You can target to customers who are included in lists already existing in the database or lists imported from external sources. (Refer to [Creating Target List](#) for information about creating and importing lists.)

**Note:**

- The lists dimension is only available to clients who are implemented on the realtime 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 versus Profile Dimension List

The difference between the ability to target an offer directly to one or more lists at the Offer > Customer Targeting page and the customer profile dimension for lists is the following :

- When setting customer targeting for an offer, you can include any number of customer profiles and lists. The customers are eligible for the offer if they are members of any of the included customer profiles or lists. This is because the relationship between the lists and/or profiles is an OR statement.
- Targeting using the list dimension of a customer profile uses lists in combination with other targeting dimensions of the profile. The intended target has to be a member of the list and must also meet the other profile criteria such as past purchase, and so on. This is because the relationship between customer profile dimensions is an AND statement.

## Customer Profile: Adding Target List

### Procedure

1. Navigate to **Target > Customer Profiles > New/Edit Profile**.
2. Select the **Lists** dimension.

The List Targeting page is displayed.

3. Click **Add Lists**.

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

4. Select the check box next to the lists you want to add. (You can also select **Check All**.)

5. Click **Add Checked**.

This returns you to the List Targeting page.

6. Click **Save**, which saves the selected lists, or click **Done**, which saves the selected lists and returns you to the Manage Customer Profiles page.

The customer profile to which you added a list dimension is displayed in the list of customer profiles with **LST** under the **Attributes** column.

## Customer Profile: Removing Target List

### Procedure

1. After adding lists to the customer profile, the lists are displayed in the List Targeting page with a **Remove** link and **Remove All Lists** button.
2. You can remove the added lists by clicking **Remove** next to the appropriate list.
3. You can also select **Remove All Lists**.
4. Attempting to remove lists opens a dialog, which reads “This action will remove this list. Do you want to continue?”
5. Click **OK** or **Cancel**.

## Dimension: Offer Redemptions

You can use the **Offer Redemptions** dimension to target shoppers who are eligible for and have redeemed, or have not redeemed, an offer in a selected time frame.



**Note:** The customer profile targeting dimension for offer redemption considers only customers who are eligible for the offers, not all customers.

Using this profile dimension, you can provide additional incentive for customers to make a repeat purchase within a certain time frame. For example, you could create a "special bonus" offer with double or triple points to incent customers to make a second purchase within a determined time period after redeeming a reward.

Target customers based on the following types of Offer Redemptions conditions:

### **Redeemed**

A defined number of times the customer redeemed an offer within a selected time frame.

### **Did Not Redeem**

A defined time frame during which the customer was eligible for, but did not qualify for or redeem an offer.

## **Dimension: Past Purchases**

Use the **Past Purchases** dimension to select customers who have made purchases of specified products or purchases within specified categories within specified times. You can add multiple selection requirements, mixing both product and category purchases.

The logical conditions used in the **Past Purchases** dimension are based on the data provided to Reward by your company in its most recent product catalog file. If this file has never been provided, this dimension cannot function.

For each condition, three dropdown selection boxes are displayed. The default values for each are displayed:

### **Any Purchase**

Use this first control to select the number of purchases. Note that zero purchases ("0 purchase") is not a valid response, and that "**any purchase**" means one or multiple purchases (any number greater than zero).

### **In categories**

Change this to **of products** or **of brands**, as appropriate.

Use **in categories** to select customers who have purchased a product or products within a specific category or set of categories. Click **Add Categories** to open the Select Category dialog box, then add one or many categories.

Use **of products** to select customers who have purchased a specific product (a product with a unique SKU) or some selection from a set of products. Click **Add Products** to open the Select Product dialog box, then add one or many specific products.

Use **of brands** to select customers who have purchased a specific brand of products. Click **Add Brands** to open the Select Brands dialog box, then add one or more brands.

### In the last 3 months

Change this to the time period in which purchases must have been made. The time limitations range from "In the last week" to "In the last 2 years".

## Selecting Customers on Past Purchases

### Procedure

1. Select the first purchase condition.  
The first past purchase condition panel is displayed by default, but you can add more by clicking **Add Another Condition**.
2. Specify the number of purchases, using the first drop-down list.
3. Select either **in categories** or **of products**, using the second drop-down menu.  
Depending on your selection of **in categories** or **of products**, the appropriate list box and related controls are displayed in the list panel.
4. Specify the time limitation, using the third drop-down menu.
5. In accordance with the setting and changes described in step 3, click either **Add Categories** or **Add Products** or **Add Brands** to add categories, products, or brands.  
If you use the Products dialog box, you must manually close it.
6. Click **Save** after every addition or change.
7. To add another condition based on past purchases, click **Add Another Condition**, and repeat steps 2 through 6.
8. Select or clear the **Customer MUST match** check box, as appropriate.
9. Click **Save**.

## Dimension: Point Activity

You can use the **Point Activity** dimension to target customers based on points activity (or inactivity) during a time frame. Using this profile dimension, you can encourage additional purchases by targeting customers who are approaching a reward threshold.

Additionally, you can incent customers to use points before they expire or restart earning points after points have expired.

Target customers based on the following types of **Point Activity** conditions:

### 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.

### Points Expired

A defined number of Point Types or Point Groups that expired within a selected time frame.

### Points Set to Expire

A defined number of Point Types or Point Groups that are set to expire within a selected time frame.

## Dimension: Point Balance

You can use **Point balance** dimension to select customers whose current point balance meets your defined criteria. You can specify whether a customer point balance number must be:

- Less than or equal to a number.
- Between or equal to two numbers.
- Greater than or equal to a number.

# Targeting Customers According to Their Current Point Balance

## Procedure

1. Select the **Enable Point Balance targeting** check box.
2. Make sure that the checkmark is displayed.
3. Select **Balance Type**:
  - Cumulative balance of all point groups
  - Monetary Unit points group only
  - Votes point group only
4. 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.
5. Click **Save**.

## Dimension: Communications

You can use prior communication response to target customers based on the response or the lack of a response to email communications sent to them. After you have added a targeting condition, you can specify the criteria to apply against specific emails. To get started, click **Add a Condition**.

### About setting response criteria in a condition

You can select the customers who meet the criteria for the emails you specify using the **Select Emails** button. You can choose to target by choosing all customers who were sent an email, or you can drill all the way down to those who were sent, delivered, opened, and clicked one or more emails. As you make choices in the **Select all who were** pull-down menus, some choices have more options. These are denoted by a ">".

### About selecting multiple emails in a condition

When you select more than one email using the **Select Emails** button, the resulting set of customers is the union of all customers who meet the criteria you specify for the emails that you have selected.

For example, if you select all who were sent two different emails in a single condition, the resulting set includes all customers who were sent either of the two emails.

### **About multiple conditions**

Only one condition can be edited at a time. To save any changes you make when configuring a condition, click its **Update** button. To discard any changes made since the last time you clicked **Update** or **Save**, click **Cancel**. To edit a condition in its "collapsed" state, click **Edit** button. When you add and configure more than one condition, the resulting set of customers are derived from the intersection of the set of customers within each condition.

For example, if you select two different conditions, both of which define all who were sent a single specific email, the resulting set only includes customers who were sent both emails.

### **Selecting emails in a condition**

When you select more than one email using the **Select Emails** button, the resulting set of customers is the union of all customers who meet the criteria you specify for the emails that you have selected.

For example, if you select all who were sent two different emails in a single condition, the resulting set includes all customers who were sent either of the two emails.

### **Multiple conditions**

Only one condition can be edited at a time. To save any changes you make when configuring a condition, click **Update** button. To discard any changes made since the last time you clicked **Update** or **Save**, click **Cancel**. To edit a condition in its "collapsed" state, click **Edit** button. When you add and configure more than one condition, the resulting set of customers are derived from the intersection of the set of customers within each condition.

For example, if you select two different conditions, both of which define all who were sent a single specific email, the resulting set only includes customers who were sent both emails.

## Dimension: RFM (Recency, Frequency, Monetary Value)

RFM (Recency, Frequency, Monetary value) is one of the fundamental segmentation systems applied to retail markets. You can use the RFM dimension to filter customers based on any or all of the following conditions and your settings for each condition:

### Recency

Weeks since the customer last purchased (positive transaction)

### Frequency

How often the customer made a transaction within the chosen time frame

### Monetary Value

The net spending of the customer within the chosen time frame

### Membership Lifespan

How many weeks it has been since the customer enrolled in the loyalty program

### Lifetime Spend

The net spending of the customer since enrollment in the loyalty program

## Setting Parameters for the Conditions

### Procedure

1. For each condition you wish to apply, click **Activate**.

The display area changes from grey to green, indicating this condition is in use. Use the right and left slider tools to define ranges. Click the blue arrowhead pointer on either slider and drag the slider to the desired setting to define the lower or upper boundary.

2. If appropriate, change the time scale.
3. Click and drag the sliders on either end of the range to set an upper or lower boundary, as appropriate.
4. Click **Save**.
5. Repeat the process for each condition you wish to apply.

## Disabling a Parameter Setting for a Condition

### Procedure

1. Click **Reset**.

Your settings are removed and the display area turns from green to gray.

2. Click **Save**.

## Modifying Frequency or Monetary

### Procedure

1. In the time frame control drop-down menu, click the down arrow.

From the options that are displayed in the list, choose one : last 4 weeks, last 13 weeks, last 26 weeks, last 52 weeks, last 78 weeks, or last 156 weeks.

2. Click **Save**.

## Dimension: Tender Types

You can use the **Tender Types** dimension to target customers based on recency, frequency or spend using a select tender type within a defined period of time. Using this profile dimension, you can encourage customers to make purchases using a certain tender type (like a private label credit card).

Target customers based on the following tender types conditions:

### Recency with Tender Types

A defined timeframe during which the customer last made a purchase using selected tender types.

### Frequency with Tender Types

A defined number of purchases using selected tender types within a selected timeframe.

## Monetary Value with Tender Types

A defined monetary spend using selected tender types within a selected timeframe.

## Dimension: Tiers

If you have implemented tiers in your loyalty program, you can use this dimension 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.

Reward evaluates customers for their tier memberships every night. A change in a customer's tier level might 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 get into silver. Customers who accrue 400 points get into gold. The decision to implement tiers is one of the basic program design decisions that a company typically considers when setting up its loyalty program.

## Basket Profiles

### About Basket Profiles

You can use basket profile to set up conditions (basket profiles) that must be met for the items in a customer's shopping basket to qualify for an offer. If a basket passes, the items in the basket are evaluated for a reward. If the basket does not pass, the items in the basket are not evaluated and no reward is given, even if specific items would otherwise qualify for a reward. You can set up specific conditions that a basket must pass before the items in the basket are evaluated.

## Basket Profile List Page

Select **Target > Basket Profiles** to open the Manage Basket Profiles page. The Manage Basket Profiles page provides access to all basket profiles, and helps you create and edit each basket profile.

### Profile Page Features

Clicking **Create > New Target Basket Profile** starts the Create New Basket Profile process.

The **Manage Basket Profiles** panel includes:

- Standard navigation controls (the **Show** filter and the **1 2 3** page control).
- The complete list of basket profile records.

Each row in the list represents a basket 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:

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

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

#### Basket Profile Name

The name of the basket profile as defined in the CRMS, and set up as a hyperlink to the basket profile record. Click the basket profile name to open the record, either to see or edit its details.

#### Attributes

This column usually shows abbreviations for the attributes used to define the basket profile.

#### Updated

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

The following functions are supported:

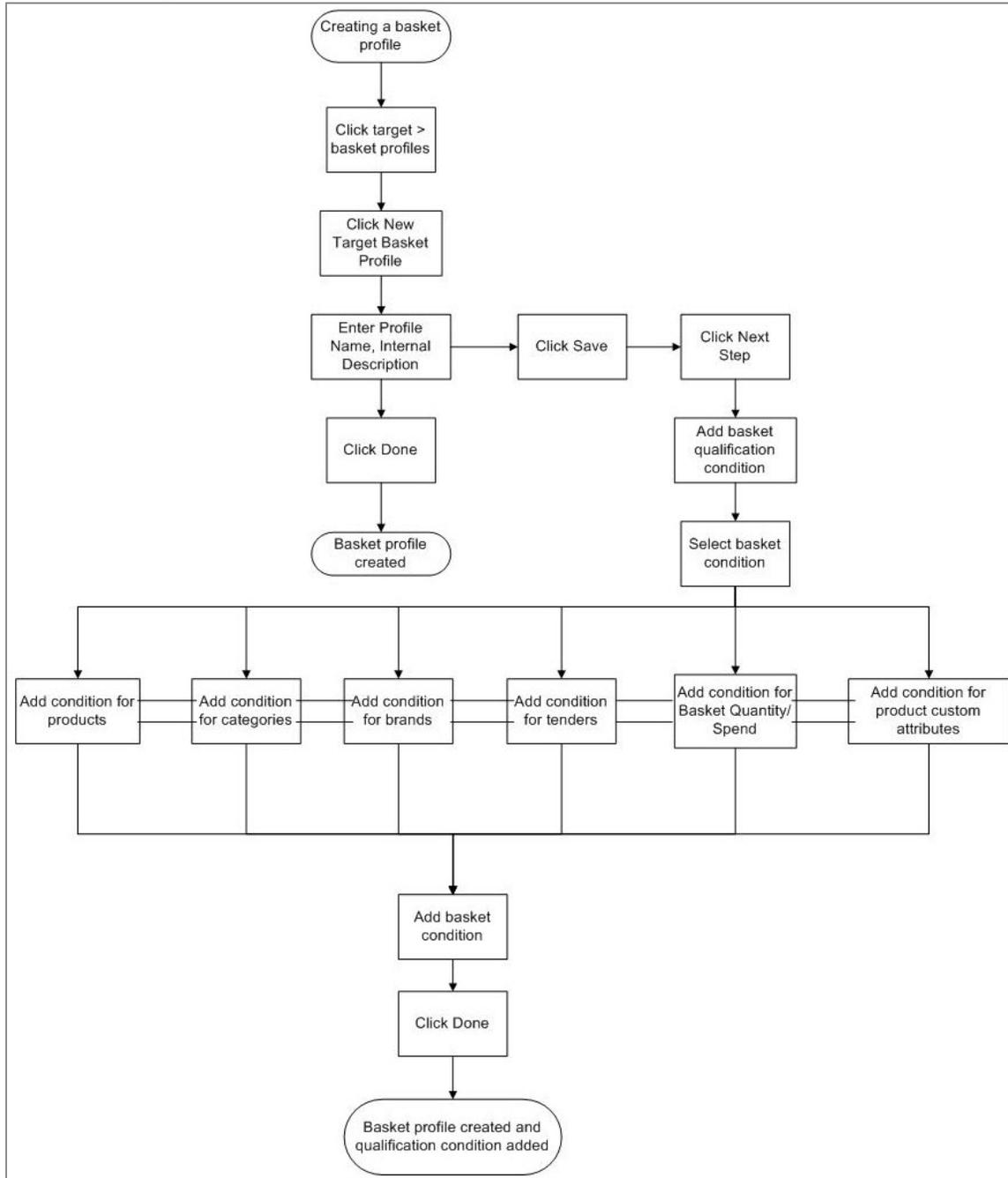
**Clone**

You can clone the associated basket profile record.

**Delete**

You can delete the associated customer profile record.

## Creating Basket Profile



### Procedure

1. Navigate to **Target > Basket Profiles**.
2. Click **Create New Target Basket Profile**.

This opens the Basket Targeting wizard.

3. In the **Basket Profile Name** field, enter the basket profile name.
4. In the **Internal Description** field, provide internal notes (optional).
5. Click **Next Step**.

This opens the Basket Qualification Conditions page.

6. From the **Add a basket condition to evaluate** pull-down menu, select one of the following:
  - Products
  - Categories
  - Brands
  - Tenders
  - Basket Quantity/Spend
  - Product Custom Attributes

7. Click **Add**.

Follow the appropriate steps based on the basket condition you selected as explained in [Basket Profile Condition](#).

## Basket Profile Conditions

The following are the evaluation criteria that determine the basket profile, that you create :

- Products
- Categories
- Brands
- Tenders
- Basket Quantity/Spend
- Product Custom Attributes

## Creating Products Condition

Follow these steps when using **Products** as the condition to evaluate a basket:

## Procedure

1. Complete the following statement by selecting the appropriate values from the pull-down menus:

**Match baskets that contain** (exactly, less than or equal to, greater than or equal to, between or equal to) (quantity) (items, monetary units spend) **in selected products.**

2. Click **Add Products.**

This opens the Select Products screen.

3. Select a product by selecting the check box next to the products you want to add.
4. Click **Add Checked.**
5. Close the Select Products screen.

The selected products you chose are now displayed in the basket qualification conditions screen for the basket profile you are creating.

## Creating Categories Condition

Follow these steps when using **Categories** as the condition to evaluate a basket:

### Procedure

1. Complete the following statement by selecting the appropriate values from the pull-down menus:

**Match baskets that contain** (exactly, less than or equal to, greater than or equal to, between or equal to) (quantity) (items, monetary units spend) **in selected categories.**

2. Click **Add Categories.**

This opens the Select Categories screen.

3. Select a category by selecting the check box next to the category you want to add.
4. Click **Add Checked** to add the products.
5. Click **Done.**

The selected categories you chose are now displayed in the basket qualification conditions screen for the basket profile you are creating.

## Creating Brands Condition

Follow these steps when using **Brands** as the condition to evaluate a basket:

### Procedure

1. Complete the following statement by selecting the appropriate values from the pull-down menus:

**Match baskets that contain** (exactly, less than or equal to, greater than or equal to, between or equal to) (quantity) (items, monetary units spend) **in selected brands**.

2. Click **Add Brands**.

This opens the Select Brands screen.

3. Select brands by selecting the check box next to the brands you want to add.
4. Or, find brands by entering the brand name and clicking **Go**.
5. Click **Add Checked**.
6. Click **Done**.

The selected brands you chose are now displayed in the basket qualification conditions screen for the basket profile you are creating.

## Creating Tenders Condition

Follow these steps when using **Tenders** as the condition to evaluate a basket:

### Procedure

1. Complete the following statement by selecting the appropriate values from the pull-down menus:

**Match baskets that contain** (exactly, less than or equal to, greater than or equal to, between or equal to) (quantity) (items, monetary units spend) **in selected tenders**.

2. Click **Add Tender**.

This opens the Select Tender Types screen.

3. Select tender by selecting the check box next to the tender you want to add.
4. Click **Add Checked**.

5. Click **Done**.

The selected tenders you chose are now displayed in the basket qualification conditions screen for the basket profile you are creating.

## Creating Quantity/Spend Condition

Follow these steps when using **Basket Quantity/Spend** as the condition to evaluate a basket:

### Procedure

1. Complete the following statement by selecting the appropriate values from the pull-down menus:

**Match baskets that contain** (exactly, less than or equal to, greater than or equal to, between or equal to)(quantity) (items, monetary units spend).

2. Click **Add**.
3. Click **Done**.

The selected basket quantity/spend you chose is now displayed in the basket qualification conditions screen for the basket profile you are creating.

## Creating Product Custom Attributes Condition

Follow these steps when using **Custom Attributes** as the condition to evaluate a basket:

### Procedure

1. Complete the following statement by selecting the appropriate values from the pull-down menus:

**Match baskets that contain** (exactly, less than or equal to, greater than or equal to, between or equal to) (quantity) (items, monetary units spend) **in selected attribute**.

2. Select a product custom attribute.
3. Select one of the following options in the **Select all that are** field:
  - less than or equal to
  - greater than or equal to

- between or equal to
4. Enter a number.
  5. Click **Add**.
  6. Click **Done**.

The selected custom attributes you chose are now displayed in the basket qualification conditions screen for the basket profile you are creating.

## Editing Basket Profile

### Procedure

1. In the **Target > Basket Profiles** page, click the basket profile name of the profile record you want to edit.
2. Change the name or description or both, as appropriate, to reflect the purpose of the profile record.
  - In the **Name** field, enter a name that is unique and succinct.
  - In the **Internal Description** field, provide internal notes (optional).
3. Click **Save** or **Next Step**.
4. Change the **Basket Qualification Condition** as needed.
5. Change evaluation conditions if appropriate.
6. After you have made the changes, click **Save**.
7. Click **Done** to save and close the profile.

The **Manage Basket Profiles** page is displayed again.

## Cloning Basket Profile

Cloning a profile record creates a copy of the record.

### Procedure

1. Find the profile record in the **Target > Basket 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 certain 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". Note, however, that if you make multiple clones of "XXX", they are all named "Copy of XXX".
- The **Profile Updated** date is, by default, reset to the date when you create the clone.

Here are some tips for using a cloned profile record to create a new profile:

- Start by assigning the cloned copy its own new, unique, descriptive profile name and internal description.
- As you edit a clone, make sure the **Internal Description** accurately reflects the dimensions and parameters you have defined. Before you click **Done**, review and update the profile name and internal description to ensure that they reflect the purpose and contents of the new profile.
- If you must stop working on a profile before it is completely defined, note its status. Applying even an informal system of version and revision tracking can help you save time and improve your profiles.

## Deleting Basket Profile

Deleting a basket profile removes a profile record from the listing in the **Target > Manage Basket Profiles** page.

### Procedure

1. Find the profile record in the **Target > Manage Basket Profiles** page.
2. Click **Delete** in the row of the profile record you want to delete.

A dialog box is displayed with a prompt "This action will permanently delete basket profile 'xx'. Do you want to continue?"

3. Click **OK** to erase the selected record.

The basket profile is no longer displayed in the list on the **Target > Manage Basket**

**Profiles** page.

**Warning!** You cannot recover a basket profile that has been deleted.

## Lists

### About Target 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 > 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 can 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 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 it is assigned a unique ID in CRMS, that CRMS list of customers cannot be edited. To change the content of a list, you must use it to create a new list and give it a new name.

### Target List Page

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

### Features and Fields

#### Source File section

- **Source File** : 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.
- **I Agree** check box : this requires you to verify that the customers in the list to be imported meet the "**opt-in**" requirement.

### Import Settings section

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

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

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

### Email Notification

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

You can create a target list in CRMS in different ways. Several of these methods create new lists by sorting and selecting email addresses from existing lists. Existing lists are stored in your Reward customer database, and have already passed tests for data quality (valid format, no duplications, and so on).

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 makes additional customer data available. Existing data is not changed.

## Create Target List

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

### **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.

### **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.

### **From Existing Lists**

Create a list by working with target lists already saved in CRMS, using one of the following methods:

#### **Subtraction**

Subtracting one or more Lists from a starting list.

#### **Merge**

Combining two or more lists.

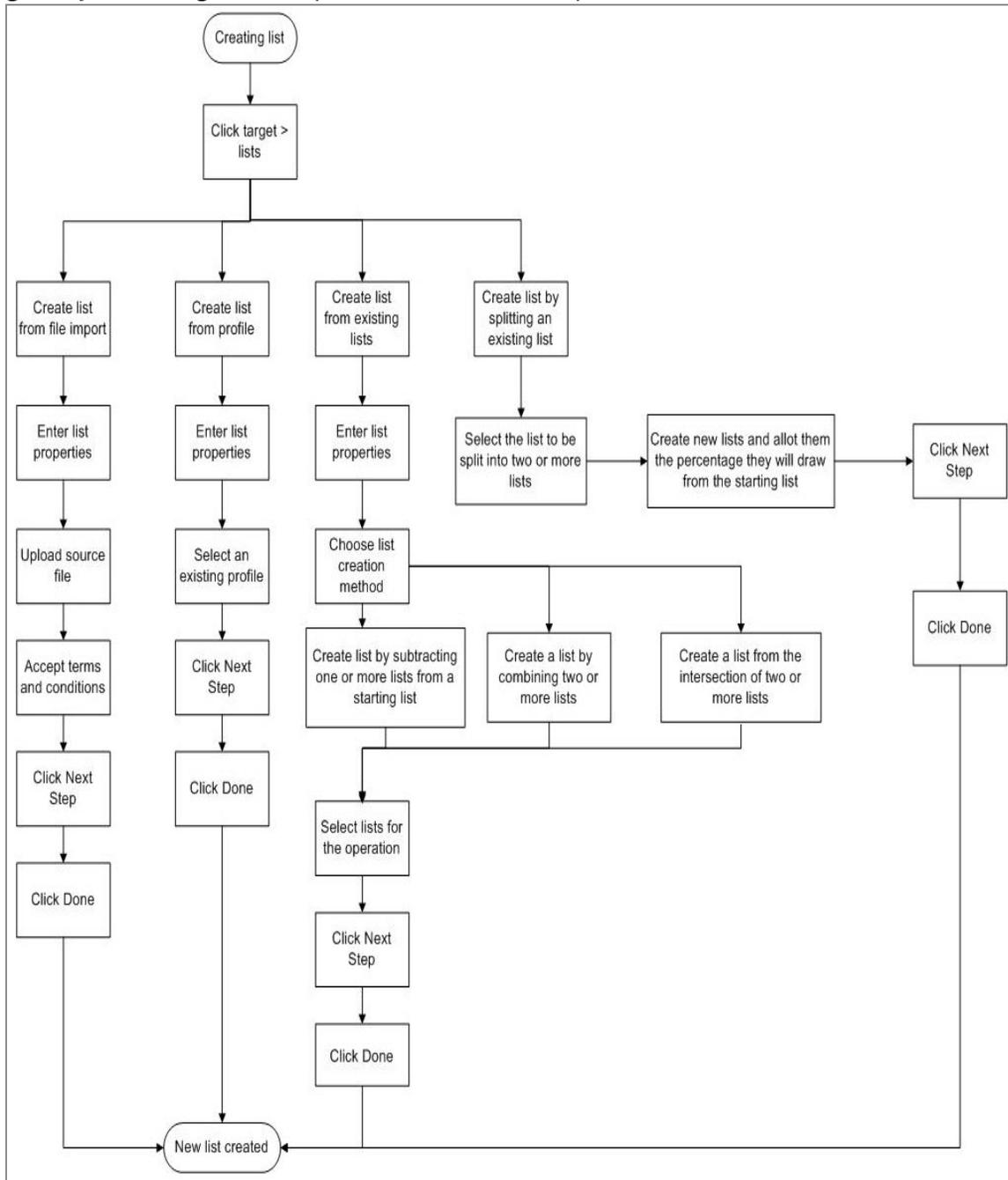
#### **Intersection**

The intersection of two or more lists.

### **By Splitting an Existing List**

By dividing up the set of customers in an existing CRMS list into subsets, each of which constitutes a new list.

To help you create new lists based on the existing target lists, CRMS provides wizards to guide you through the steps of the list creation processes.



## About Target 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 considered 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 makes additional customer data available. The 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.

## Features and Fields

- The **Create New List** option
- The Manage Lists panel

Each row in the Manage 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.

## 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 **Internal Note** text fields. Click the list name to open the list properties data, either to see or edit its details.

## 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.

## Reporting

Provides list import details.

## Created

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

## Total

The total number of customer records in the list.

# Creating Target List from File

## Procedure

1. From the **Target > Lists** page, select **Create New List > From File Import**.  
The New List from Import wizard is displayed.
2. Define the List Properties. Enter text in the three fields: **Name**, **Source**, and **Internal Note**.
3. Select the Source File.
  - a. Click **Browse**.  
A standard dialog box is displayed, titled "Choose file", using which 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.

**i Note:** Your list must contain one or more properly formed email addresses, separated by line breaks. If the selected file passes the validation checks, its name is displayed again in the **Source file** text field.

4. Read the text stating, "You must read the following..." and respond. This text concerns the requirement that persons in a list to be imported have opted in. Verify whether the list you are uploading meets the criteria. If it does, select the **I Agree** check box.

**i Note:** If the list includes email addresses from customers that have not provided permission to send them email, do not select the **I Agree** check box. Make the necessary changes outside of the CRMS platform.

5. Verify whether the selected **Import Settings** (Updates, Import As, Email Opt-In) are correct for your purposes.
  - If the rules that are displayed do not suit your purposes, you can change them.
  - To change the import settings, you can click the linked text, Click here to cancel your file import and change these settings. Note, however, that this closes the current wizard without saving your data.
6. To receive an email notification when your import has started, and again when it completes, enter an email address.
7. Click **Next Step** at the top of the page.

The CRMS opens the next page of the wizard, titled **Request Status**, and displays the message, "Your has been scheduled", along with a table of information about this list.

**i Note:** You can copy and save the table of information from this page. Pasting this table information into a document file outside of CRMS helps you retain a record of parameters and specifications you used to create the associated list.

8. Click **Done** to complete the process.

The CRMS processes the list creation information you have provided, opens the **Target > Lists** page, and displays a new row of information for this list in the **Manage Lists** table. The **Status** field for a newly created list is very important, because it indicates whether the list was successfully created.

- If the list creation succeeds, the **Status** field is gray and displays the word Ready. If this status is displayed, the list is ready to use.
- If the list creation fails, the **Status** field turns red and displays the word Failed. The list creation process failed and the list is not available.
- Depending on the complexity of the list creation task processing, the **Status** field for the new list can be yellow and might display the label "In Progress" for a few minutes until the processing is completed.

## Profile Target List

This section explains how to create a target list by applying an existing profile to a customer population. The basic procedure is simple: you pick a profile, and CRMS applies the selection criteria defined in that profile to Reward's most up-to-date customer information database. This process yields a list composed of the customers who currently fit the profile.

The first step in creating any target list is to name it and record the properties of the list. Immediately after you click any **Create New List** option, the first page in each list creation wizard opens, showing the List Properties panel.

## Features and Fields

### List Properties section

The List Properties fields are the same for every list creation method.

### Source Profile section

#### Source Profile

Clicking this button opens the **Select Profile** dialog box, using which you can select a profile to create the new list. After you select the profile from a dialog box, its name is displayed, and a **Change Selection** button replaces the **Select Profile** button. You can

use the **Change Selection** button to reopen the **Select Profile** dialog box, and any profile you then select replaces the existing selection.

### Profile Selection dialog box

You can use this dialog box to select one of the existing profiles from a list of all currently defined profiles. The selected profile is applied to the current customer data to select the set of customers in the list. This dialog box includes a **Find** button and other standard dialog box features.

## Creating Target List from Profile

### Procedure

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

The New List from the Profile wizard is displayed.

2. Define the List Properties:

Enter text in the three fields:

- **Name** : create a name for this list. The list name is displayed on the table of lists on the **Target > Lists** page, in Targeting, and in Reports. Lists must be named.
- **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, a file containing an SQL search.
- **Internal Note** : 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.

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 name is added to the

profile box in the New List from Profile wizard. The **Change Selection** button is displayed next to the profile selection box.

4. To change your profile selection, click **Change Selection**, then repeat the previous step.
5. Click **Next Step** to save your work and advance to the next step of the wizard. The Request Status section of the wizard opens, displaying the message, "Your list is being created."
6. Click **Done**.

When the list creation process is completed, the **Target > Lists** page is displayed again. In the **Manage Lists** table, a row shows information for the list you have just worked on, including the status and other standard information.

## Target 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 can also be associated with a customer record.

**Import List Format:** You can import the simplest form of target list: 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 > Lists** page.

**Export List Format:** When you use the CRMS Target>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)\*:

```
"990000000000000019", "53542359", "2007-01-30T13:50:17", "Dawn", "Cristopher", "412
Midland Avenue", "Apt 4E", "Emeryville", "CA", "94608", "US",
"dawnbcristopher@wahoo.com", "5105551234", "9876543210000019"
```

**i 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 were to export 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 the rules specified in **Admin > Main Settings > List Import**. You can check these rules, and change them if they do not suit your purpose.

- **New List** - this drop-down uses the current list as the basis for creating a new list. When you click the down arrow, a list of the following options is displayed
  - Using split
  - Using subtraction
  - Using merge
  - Using intersection

Selecting any one of these options starts the process of generating a unique new list, using the selected method and starting with the current file as the basis. Each method creates a new list file and initiates the New from Existing List wizard, which assists you in the process of populating the new file with a new list.

- **Export** : you can generate a comma separated value (CSV) file containing the existing Reward customer data for the customers included in this 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"<List Name>\_<your CRMS user name>\_<date when list file was generated/exported>. See [Target Lists](#) for the data format of the exported lists.
- **Delete** : you can permanently delete the associated list.

# Postal Codes

A postal code set is a collection of postal codes intended for use in a targeting profile. A postal code set is defined as a set of postal code numbers contained in a file, which is in either Comma Separated Value (.csv) or Tab Delimited (.txt) format.

To upload such a postal code file and assign a name to the set of postal codes it contains, click **Target > Postal Codes** in CRMS menu. The Manage Postal Code Sets page opens.

Use the **Target > Postal Codes** page to specify the location and filename of the postal code file you want to upload.

## Purpose

The postal code lists that you define with this page become available for use when you define a profile that uses the **Geographic** dimension. Instead of using the other options listed in the **Geographic** dimension to define targets according to geographical locations, you can select a Postal Code set. Each Postal Code set is a file, which you have uploaded using this **Target > Postal Code** page, that contains your own predefined set of postal codes. A postal code set is often the best way to set up a very specific set of postal codes for use with CRMS targeting features.

You can use postal code sets to target customers with the specificity of individual five-digit postal codes.

 **Note:** The use of the postal code targeting in the Geographic dimension often means that you are collecting postal codes from customer records. Be aware that such data can be collected by using data integration, the microsite, APIs, or the Support tool.

## Defining Profile Using Postal Code

### Procedure

1. Create or obtain a set of postal codes that identify your specific target by location.
2. Put the postal codes into the proper file format and location, and assign it a descriptive name. (Recommendation: Establish a naming convention for postal code set names, to prevent confusion of files and file-versions.)

3. Upload the file using **Target > Postal Codes**.

**i Note:** Postal Codes must be uploaded ASCII text files.

4. Create a Customer profile.  
(Recommendation: Assign a name that refers to the postal code set.)
5. Select the **Geographic** dimension.
6. Choose the Postal Codes sets option.
7. Select the postal code set defined for your specific targeting purpose.
8. Save the dimension and profile.

## Fields and Features

**i Note:** Before you use the postal code sets page, the file containing the postal codes must already exist and be accessible from your PC. TIBCO Reward recommends that you double-check and correct the postal codes and file format before you upload the file.

To use this page, you provide the following information: the name you are going to assign to the postal code set, and the address of the file you are going to upload.

- Enter the name to be assigned to the set of postal codes you are going to upload. Including notes is not possible, so make sure your source files are organized. You can manage the data using assigned notes.
- Enter the path and file name of the postal code file you want to upload:
  - Click **Browse** to open a standard **Choose File** navigation tool.
  - Use this to navigate through your local and network file hierarchies and select the path and file name for the set of postal codes you want.
  - Double-click the postal code file, or select it and click **Open**. The navigation tool closes and the path and filename are inserted into the File text box.

**i Note:** Be sure to click **Upload** after the path and name of the file are selected.

- When the file has been uploaded, the name you assigned to the set is displayed in the list of **Current Postal Code Sets**, indicating that the upload has been successfully completed.

#### **Upload Notes:**

- Your Postal code set file must include postal codes as ASCII text files. Other formats can cause imports to fail.
- At present, five-digit postal codes are supported as the standard.
- Double-check your values and file format before you upload the file.

## CSV File Example

File title: `WealthiestDonorspostalCodes.csv`

File content:

```
10021,10023,10024,10028,10128,20007,20008,20016,90049,90210,75205,75225,77019,  
77024,06830,06831,45243,78209,63124
```

**i** **Note:** You can generate a list of the existing Loyalty program members who have the postal codes in your file, and then use Target>Lists options to edit and add to that customer list.

## Custom Questions

You can use custom questions to create your own questions and answers for use in targeting profiles. Your customers are presented with these questions during Signup and can change or update their answers through their My Account page.

Step 1 - Create your Questions - Click "create a new question". You are asked to write the question, choose an answer type, and write your answer choices.

Step 2 - Create your Questionnaire - After you have created your Questions, collect your Questions into a Questionnaire by clicking Setup. You can add up to 3 Questions as part of the Standard service.

Step 3 - Enable your Questionnaire - Your Client Services Manager can assist you in enabling your Questionnaire if it is ready. After Questionnaires are enabled, you can target profiles based on customer responses to your questions.

Custom Questions can be included in a questionnaire that is displayed to your customers in their microsite. When enabled, loyalty program members can see your questionnaire and answer its questions. The questionnaire can be displayed in the customer sign-up process, or in a customer's My Account page, or both, depending on your microsite design decisions.

**i Note:** You can use the **Questionnaire** section of the Custom Questions page to create and work with questionnaires by adding, deleting and rearranging custom questions.

## Custom Questions: Create

There are two basic ways to create new custom questions: Import and Create.

1. Select **Target > Custom Questions** and then **Create a New Custom Question**.
2. Click **Import Custom Questions** to initiate the bulk file upload process.

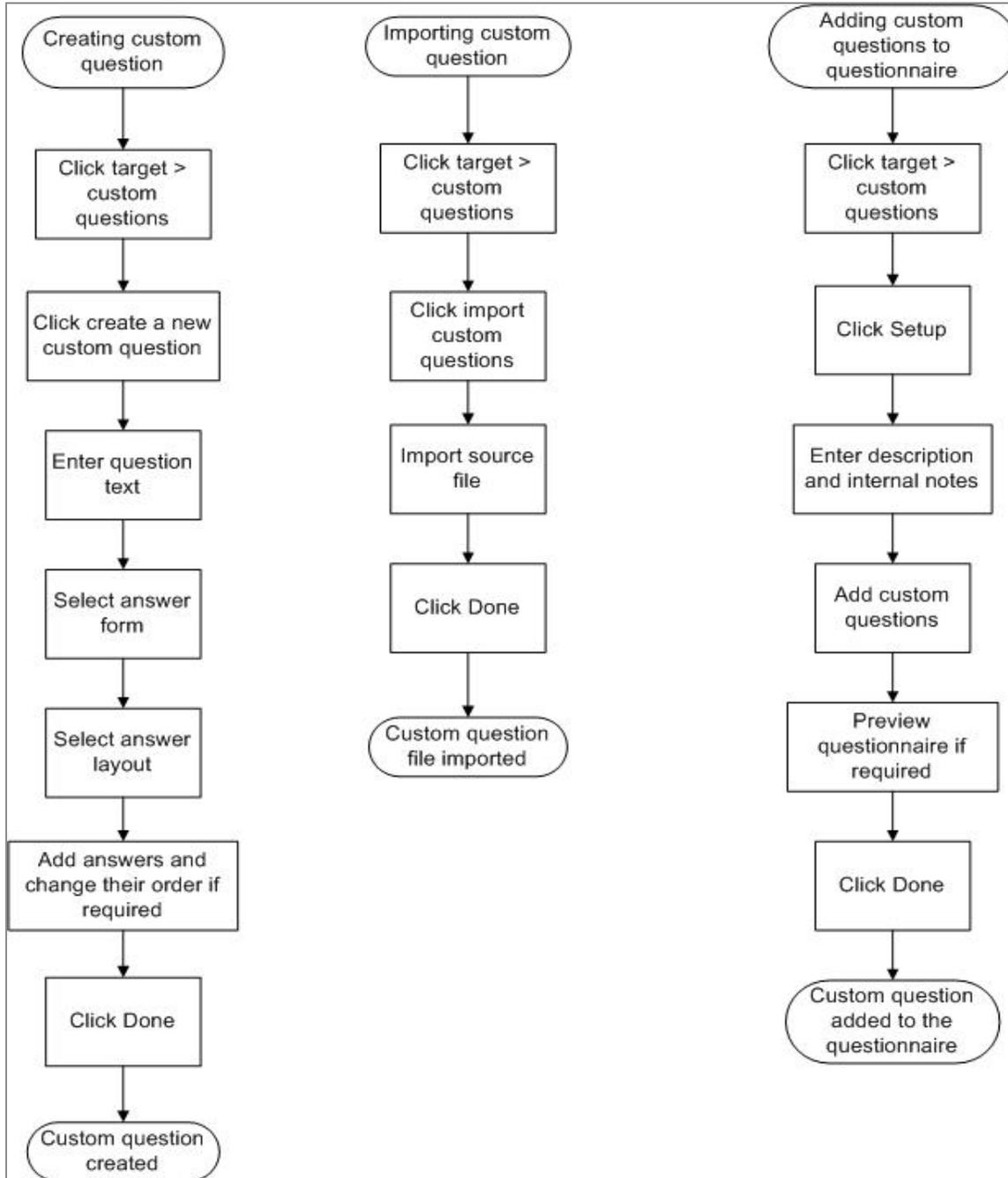
You can also create a new custom question by cloning an existing question and then modifying it. Regardless of which method you use to create questions, you use the same procedure to set up a questionnaire and add a question to it.

When creating custom questions, note:

- All questions included in a questionnaire are displayed on one page (a scrollable view).
- A questionnaire cannot be divided into separate pages.
- A maximum of 20 possible responses per question is allowed; that is, the number of possible response choices cannot exceed 20.

**i Note:** Custom Questions are not related to custom attributes.

## Creating Custom Question



Follow these steps to create a new custom question in CRMS (without uploading a file):

### Procedure

1. Select **Target > Custom Questions**.

The Manage Custom Question page opens.

2. Click **Create a New Custom Question**.

The Edit a Question page opens.

3. Enter Question Text.
4. Enter Answer Form (radio button or check box).
5. Enter Answer Layout (List or Column then Rows).
6. Enter Answers.
7. Click **Add Another Answer** (if needed).
8. Click **Done** when you have completed your definition of the custom question, including the responses.

The **Target > Custom Question** page reopens. Verify that the **Manage Your Questions** list includes your new question.

If you want the new questions and responses to be displayed in your questionnaire, click the **Setup** to open the Questionnaire Setup page.

## Procedure

1. Refer to the sample CSV file and instructions provided on the **Target > Import Custom Questions** page.

Use Excel or a generic text editor (such as Notepad) to open the sample file.

2. Create a CSV (comma separated values) file that contains your Question and Answer text and formatting instructions.
3. Store the CSV file in a location accessible from your computer.
4. Upload the file by using **Target > Custom Questions > Import Custom Questions** options to locate and identify the file.

If the upload is successful, the upload screen is updated with information confirming the filename and number of records uploaded.

After importing, your questions and their associated answers are added to the pool of all custom questions. You can edit these questions in CRMS.

You can also use the file upload method to make certain types of changes to existing custom question records.

To add existing questions to a questionnaire, click **Setup** to open the Questionnaire Setup page.

## Setting up a New Questionnaire

As a general rule, limit the length of your questionnaires to minimize customer abandonment.

### Procedure

1. In the **Target > Custom Questions** page, click **Setup** to open the Questionnaire Setup page.
2. Use the Questionnaire Setup page to:
  - a. Provide text telling your customers why they should complete the questionnaire. This shows up as the introductory text on the page in the microsite where custom questions are displayed.
  - b. Add the questions to be displayed to customers.
  - c. Change the order of the questions in the questionnaire.

3. Click **Done**.

The **Target > Custom Questions** page reopens.

Optional:

- If the questionnaire is enabled, you can click **Disable**.  
Disabling the questionnaire prevents your questionnaire from getting displayed in the microsite before it is ready for customers to use and before you have modified any profiles that are based on your custom questions. When you click **Disabled**, the button text changes to **Enabled**, which is the alternate option.
- If you are using this page for the first time, the only option that is displayed is the **Setup** option. Clicking **Setup** enables the questionnaire and makes it accessible to customers.

4. Click **Preview**.

The **Preview** window opens. Carefully proofread and test your questionnaire.

Consider how it is used to define a customer profile.

5. When you are finished with the **Preview** window, click **Close**.
6. Modify the question and responses, as necessary, using steps 2 and 3.
7. If you have Disabled the questionnaire. When you are ready to present the questions to live customers, click **Enable**.

## Changing an Existing Custom Question

### Procedure

1. In the **Target > Custom Questions** page, in the Manage Your Questions listing, find the Question you want to change.
2. Click the Question Name to open the related data in the Edit a Question page.
3. Make the required changes and click **Done**.

For complete details, see Edit a Question page.

You can also use the file upload method to make certain types of changes to existing custom question records.

## Creating Custom Question

Using these instructions to create a new custom question, complete with formatting and answers. These instructions assume you use the **Create a New Custom Question** link in the **Target > Custom Questions** page.

### Procedure

1. Click the **Target > Custom Questions** tab.  
The Custom Question page opens.
2. Click the **Create a New Custom Question** option.  
The Edit a Question page opens.
3. Use the Edit a Question page to define the custom question and the valid responses.
4. Click **Done** when you have completed your definition of the custom

question, including the responses.

The **Target > Custom Questions** page reopens. Verify that the Manage Your Questions list includes your new question. To add new questions and responses to your questionnaire, see **Custom Question > Questionnaire Setup** page.

## Custom Question Details

Use the Edit a Question page to define both a Custom Question and the set of responses to it that a customer can select from. The Edit a Question page opens when you create a new custom question or when you open an existing custom question record to edit it or review it.

**i Note:** Before changing a custom question, consider how your changes can impact any profiles that currently use the custom question dimension. Affected profiles (any currently-used profiles that include a custom question dimension) should either be retired, replaced, or updated.

If you make changes to an existing custom question that has been added to the questionnaire, then those changes are automatically implemented in the questionnaire. (The process of actually updating the website shown to customers can take an hour or more.) Open a preview of the questionnaire to see how the changes are displayed to customers.

**i Note:** You can also use the file upload method to make certain types of changes to existing custom question records.

### Fields and Features

**Question Text** – This is the question as it is displayed to customers in the **Target > Custom Questions** page and elsewhere in CRMS. Enter the text that you wish to display to customers. Each question must be unique.

**Answer Form** – Select a format for the responses that customers are able to provide when they answer the custom question. You have two choices:

- Select all answers that apply using check boxes– When more than one item can be selected as the response, using check boxes is the appropriate choice. Multiple check boxes can be selected at any one time. The customer can select all, some, or none of

the check boxes made available in the response.

- Select one answer using radio button – When only one item or another can be selected as the response, a radio button is the appropriate choice. Only one radio button can be selected at any one time. When the customer selects one radio button, any other radio button that was selected is thereby is cleared.

**Answer Layout** – Whatever answer form you choose, the selected controls can be lined up in different ways. You have two choices for arranging the display of the responses:

- List – All responses are listed in order from top to bottom.
- Columns then Rows – Responses are fit into a grid, or matrix, so that many short answers can be displayed in less space. Usually better when many check boxes, most of which are associated with short text strings, are to be presented to the customer.

#### **Answers fields and features:**

- **Use** – Indicates whether the associated Answer is used (presented to customers as a possible response). You can omit a possible answer by clearing the associated **Use** check box.
- **Order** – The numbers assigned to answers represent the order in which the answers are displayed in the questionnaire or wherever else the question is presented. (Answers are listed from top to bottom, based on the order of their numbers, from least to greatest. Skipped numbers do not matter.)

To change the given order, highlight the number assigned to an answer, then type the number representing the position where you want this answer to be displayed. Avoid duplicate numbers. Be sure to click **Update Order** after changing any numbers. Then check the new order. If the questions are listed in the order you want, click **Save**.

- **Answer Text** – This is the answer as it is displayed to customers. Enter the text that you wish to display to customers as a possible response.
- **Delete** – Click the **Delete** link to remove an answer. A confirmation dialog box is displayed. Click **OK** to continue with the deletion of the response.
- **Add Another Answer button** – To add another answer (possible response), click this button. A new row of Answers fields and features is displayed. Add up to 20 answers for each question.

# Editing Custom Question

## Procedure

1. In the **Target > Custom Questions** page, click **Create a New > Custom Question**.

The Edit a Question page opens.

2. In the **Question Text** field, enter the question that you wish to display to customers.

**i Note:** When framing a question, it is best to consider the purpose to which the answers are put, and how the answers are to be used.

3. Select an answer format. Using check boxes, customers can provide multiple responses. Radio buttons require customers to provide just one answer.
4. Select an answer layout. Lists are better suited to longer answers; the Columns-then-rows layout is better suited to multiple short answers, especially in check box form.

**i Note:** Your Answer form and Answer Layout decisions apply to all answers to the current question.

5. Click **Add Another Answer** on the bottom of the page to define each possible answer.
6. For each answer, provide the exact text that you want to present to your customers.
7. When you have provided all of the answers you want your customer to see, use the **Order** field, as necessary, to specify the order in which the answers are displayed.
8. Click **Update Order** to verify that the answers are displayed in the correct order.
9. Click **Done**.

The **Target > Custom Questions** page is displayed again.

**i Note:** When you return to the **Target > Custom Questions** page, click **Setup** at the bottom of the page to add your question and answers to your questionnaire, then click **Preview** to see how your questions and answers look and behave when customers see them.

## Procedure

1. In the **Target > Custom Questions** page, in the Manage Your Questions listing, find the Question you want to change.
2. Click the Question Name to open the related custom question data record in the Edit a Question page.
3. Make the required changes and click **Done**.

**i Note:** You can also use the file upload method to make changes to existing questions. However, the file upload method is better suited to making answer format changes to a list of question records that you have already uploaded.

## Import Custom Questions

You can import Custom Questions from a file on your computer. Each Custom Question record in the file consists of a question and a predefined set of answers. Answers are set up as the possible responses from which a customer can choose.

After importing, your questions (and their answers) are added to the pool of all custom questions. You edit and work with uploaded questions exactly as you do with questions added in CRMS, using the Create a New Custom Question page.

You can also use the file import method to make certain type of changes to existing custom question records.

Imported questions are not automatically added to your questionnaire. As with the questions you create in CRMS, you must use the Questionnaire Setup procedure to add questions to a questionnaire.

## Custom Question File Details and Requirements

Your Custom Questions file must be a CSV (comma separated value) file. Column headers should not be specified in the file. Every line in the file represents a question and its associated answers, including formatting parameters.

Every line must include all the following columns (field values) in this exact order:

1. Question text (required).
2. Question category (optional - leave blank if unspecified).
3. Answer format (required), as follows:
  - Specify "single" to set up the format so that the user can select only one answer by clicking a radio button.
  - Specify "multiple" to set up the format so that the users can select more than one answer by selecting multiple check boxes.
  - If format is unspecified, "multiple" is selected by default.
4. Answer layout (required), as follows:
  - Specify "list" to present answers in a list layout.
  - Select "column" to present answers in a multi-column layout (better for one-word and very short answers).
  - If unspecified, "list" is selected by default.
5. One or more columns containing the answer choices for this question.

See the sample CSV file for examples or answer records that apply to these requirements.

In text format, each column-value must be followed by a comma. Two commas with no text between them indicate that a value has been omitted.

**i Note:** If a part of question or answer text contains a comma, you must enclose that text in quotation marks to prevent the comma being read as a value separator. Here is a sample: "text, sample"

## Sample CSV File (displayed as text)

What are your dietary preferences/restrictions?,Food habits,multiple,list,No restrictions,Ovo-lactarian,Dairy-free,Gluten/Wheat-free,Low carbohydrate,Low calorie,Low sugar,Low fat,Diabetic, Vegetarian,Vegan,Organic,Adjusted for allergies not specified here

What strongly influences your buying decisions of electronic products?,,multiple,column,Advertising,Word of mouth,Reviews,Brand recognition,Brand Reputation,Conscience factors/Political Correctness, immediate need

How do you prefer to be contacted?,,single,list,Email,Instant Message,Home phone,Cell phone,Mail,Carrier pigeon

## Creating a new Custom Question using Bulk File Upload Process

### Procedure

1. Refer to the Custom Question File Details and Requirements and sample CSV file, or to the equivalent information provided on the **Target > Import Custom Questions** page.
2. Use Excel or a generic text editor (such as Notepad) to open the sample file. Use this as a reference when you create your own file.
3. Create a CSV file that contains your Question and Answer text and formatting instructions, and store the CSV file in a location on your computer.
4. Locate and upload the CSV file by using the **Browse** and **Upload** options in CRMS **Target > Import Custom Questions** page.

If the upload is successful, the upload screen is updated with information confirming the filename and number of records uploaded. If the upload is not successful, use the information in the error message to identify and fix the problems, then repeat step 3.

After importing, your questions and their associated answers are added to the pool of all custom questions.

To add a question to a questionnaire, click **Setup** to open the Questionnaire Setup page.

## Changing Existing Custom Questions using Bulk File Upload Process

### Procedure

1. Create a CSV file that contains your modified Question records and store the CSV file in a location on your computer.

**i Note:**

- The question text is the key data in each record: it must be an exact duplicate of the existing question text in the record to be changed.
- You can specify different Category, Answer Format, and Answer Layout data in a record, and when these are uploaded, the changes are implemented. If you leave blanks where existing Category, Answer Format, and Answer Layout data already exists, the blanks are treated as errors and the upload fails.
- Be aware that you cannot change existing answer-responses with an uploaded file. However, you can upload additional answers.

2. Locate and upload the CSV file by clicking **Browse**.



**Note:** If you want to make corrections to an existing custom question record by using the file upload method, the best practice is to start with an exact copy of the existing record and then make changes and additions to it.

**Notes on uploading and errors:**

- The upload fails if the file size exceeds 1 MB.
- If one answer record fails, the entire file upload (import) fails. After making repairs to the file, you repeat the upload process for the entire file.
- If the upload fails, an error report is displayed. The report is designed to help locate and identify any errors at the individual record level. The report identifies a faulty record by number (where the first record in the file is number 1, the second is 2, and so on). In many cases, the error reporting specifies the problem to be solved in the record.
- If you leave blanks where existing Category, Answer Format, and Answer Layout data already exists, the blanks are treated as errors and the upload fails.

## Questionnaire Setup

To create a questionnaire, you must have created questions first. The questions available for use in a questionnaire are listed in the Manage Your Questions list in this **Target > Custom Questions** page.

Three general steps to setting up a Questionnaire:

- Create a Questionnaire
- Choose Questions to include in Questionnaire
- Enable the Questionnaire

After the questionnaire has been enabled, program members can see and answer your questions during the Program Signup process, and later modify their answers on their My Account pages of the program microsite.

## Questionnaire Setup Page

The Questionnaire Setup page includes the following features:

**Preview Questionnaire** button (top of page) – Click to see how the Questionnaire looks and behaves when it is enabled and presented to customers.

### Properties section

**Name** – By default, the Name assigned to this **Questionnaire** field is "Sign Up and My Account Questionnaire". This text cannot be changed.



**Note:** At this time, the text in this **Name** field is not displayed anywhere in the microsite.

**Title** – Default Title text, such as "Questions" or "Tell Us About Yourself" might be displayed in this field, but at the current time this text does not show up as the Title in the microsite. The Title that actually introduces the questionnaire in the microsite is set during the onboarding process, when your company first defines the components of its Loyalty Program. To change your questionnaire Title, please contact your Reward Client Services Representative.

**Description** – The description text is displayed near the top of the Questionnaire, just below the Title text. Use the **Description** field to tell your customers why they should complete the Questionnaire.

**Internal Notes** – Use this space to record notes about this questionnaire, its contents, and how it is used. This text is visible only to CRMS users, not to customers.

### Questions section

**Update Order** – After changing the numbers assigned to questions, which you would do to change the order in which these questions are displayed, you must click this button to reassign these questions to the new order specified by the numbers. Note that you must also click **Save** or **Done** to save the change in order.

**Remove Question** – On the same line as each Question, at the far right, is a Remove Question link. Click this link to remove the question from the Questionnaire. To see the results, click **Update Order** and check the effects.

**Choose a question to add** [drop-down selector] – Click this drop-down list to see a list of all currently available custom questions, then click the one you want to add to the questionnaire. The selected question is displayed in the selection box.

**Add** – Click this button to add the currently selected custom question to the questionnaire. It is added to the end of the list.

## Creating Questionnaire

### Procedure

1. Select **Target > Custom Questions**.
2. In the **Target > Custom Questions** page, click **Setup**.  
The Questionnaire Setup page opens.
3. Provide some **Description** text.  
Use the **Description** field to tell your customers why they should complete the Questionnaire. Make sure that the details you provide here do not disagree with the details of any offer that involves this questionnaire.
4. Add text to the Internal Notes space to document how you use these questions and your progress with respect to the project. Internal Note are only visible to CRMS users and not to customers.
5. Use the **Choose a question to add** drop-down menu (at the bottom of the page) to select each question to be added to the questionnaire, then click **Add**.  
The added question is appended to the end of the list.
6. Click **Update Order** to change the order of the questions in the questionnaire.
7. Click **Preview Questionnaire** (at the top of the page) to see a preview version of the questionnaire.

The Preview window opens. Carefully proofread and test your questionnaire. Consider how it is used to define a customer profile that includes a custom question dimension.

8. When you are finished with the Preview window, click **Close**.

This returns you to the Questionnaire Setup page.

9. Click **Done**.

The **Target > Custom Question** page reopens.

10. Modify the question and responses, as necessary.
11. Use the steps 4 through 8 to update the questionnaire.
12. After completing all work associated with the questionnaire, click **Enable** to make your questionnaire go live on the Sign Up and My account pages of the microsite.

**i Note:**

- After clicking **Enable**, the button changes to **Disable**.
- Disabling the questionnaire prevents it from getting displayed in the microsite when it is not ready for customers to use.
- If you are working on a live questionnaire in your microsite, you can disable the questionnaire so that your work in progress is not exposed to customers.

## Mobile Geolocations

### About Mobile Geolocations

Marketers use mobile geolocations to define customer profiles based on proximity to store locations. They 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.

**i Note:**

- Beta capabilities enable the configuration of mobile geolocations that can be included in shopper profile targeting dimensions. 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 dimensions are included in a shopper profile, no shoppers qualify for offers or messages that use the shopper profile.
- Your use of the TIBCO Reward mobile 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 mobile geolocation mapping functionality. TIBCO might, at its discretion, terminate or suspend your access to or use of the TIBCO Reward mobile geolocation mapping functionality if your use fails to comply with the Google Policies.

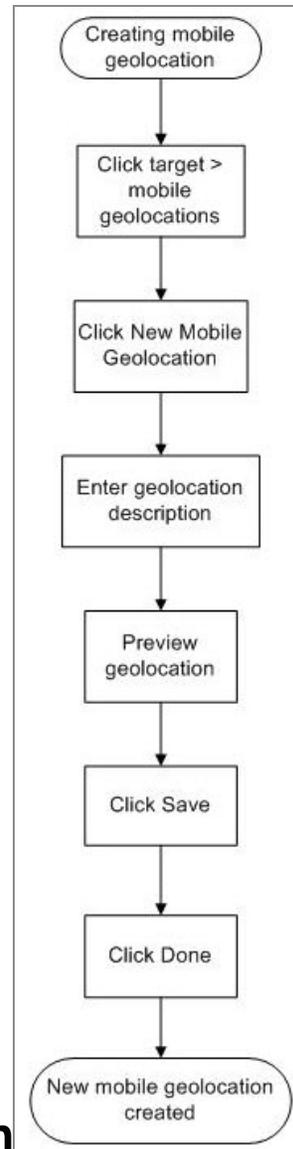
## Mobile Geolocation: Use Case

A marketer sets up a shopper profile that includes mobile geolocation targeting with a radius of 50 feet around each retail store location.

When a shopper comes within the defined radius, offers and messages that use the shopper profile are instantly delivered:

- On the retailer's mobile application
- Via SMS and/or email messaging

The shopper visits the nearby retail location and takes advantage of the offer that was just presented on their mobile device.



## Creating Mobile Geolocation

You can use geolocations to define locations that are used to trigger offers and messages when a customer enters the geolocation. Geolocations are most commonly defined around your existing retail locations.

### Procedure

1. Go to **Target > Mobile Geolocations**.
2. Click **Create New Mobile Geolocation**. This opens the Mobile Geolocation Details page.
3. Enter required address fields (marked by an asterisk).

4. Enter a radius value (measured in meters). This defines the area around the geolocation.
5. When a customer enters the area (geofence) they can trigger relevant offers and messages.
6. Click **Preview**. This opens a map showing the mobile geolocation and fence (set by the radius value entered).



**Note:** When creating Mobile Geolocations, you must click **Preview** before clicking **Save** or **Done**.

7. Click **Save**.
8. Click **Done**.

The new geolocation is displayed in the manage mobile geolocations list.

## Editing Mobile Geolocation

You can edit a mobile geolocation to correct an error, or when a geolocation needs to be changed such as when a store moves to a different location within a retail mall. Mobile geolocations in use by shopper profiles cannot be edited. To edit a mobile geolocation you must first remove from the associated shopper profile.

### Procedure

1. Go to **Target > Mobile Geolocations**.
2. Click the **Geolocation Name** of the mobile geolocation that you want to edit.  
This opens the geolocation description page.
3. Edit fields.
4. Click **Preview**. Your changes are displayed in the geolocation description page.
5. Click **Save** to save the changes to the mobile geolocation, or click **Done** to save the changes and display the list of mobile geolocations.

## Deleting Mobile Geolocation

You can delete a mobile geolocation when one of your retail stores has closed or moved.

### Procedure

1. Go to **Target > Mobile Geolocations**.
2. Click **delete** next to the mobile geolocation you want to delete. A dialog box is displayed indicating "This action will delete this mobile geolocation. Do you want to continue?"
3. Click **OK** to delete the mobile geolocation.

# Email

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This section has information about Email features and functionality in CRMS.

## Topics:

- [Communications](#)
- [Campaigns](#)
- [Trigger Events](#)
- [Stationary](#)
- [Test and Seed Lists](#)
- [Email Communication Guidelines](#)

## Communications

An email communication is a mass mailing that consists of a single email message and the profiles or lists to which it is addressed. The single message can include personalization tags and dynamic fields, that is to say, variations in content that are dynamically selected and inserted into the message, depending on the profile of the recipient. The message can also include rich content, which typically consists of HTML-based page design elements.

Email communications are often sent to a target audience for promotional purposes. Reward provides a large library of email templates for that frame your content for these purposes. Note, however, that there are no restrictions or limitations to the possible uses of an email communication.

Typical email communications include announcements, offers, invitations, newsletters, and postcards. These messages are often sent to promote products, to announce offer s, or to invite customers to take advantage of a special event. Email communications can be sent to potential customers, new customers, good customers, high value customers, at risk customers, or any other list you can define.

You can associate email communications with a campaign. This causes the data regarding the associated email communications to be associated with and tracked by the campaign reports.

CRMS provides a wizard to help you create and edit email communications. After you finish each step, the wizard saves your work and performs basic tests to identify unmet requirements.

To create an email communication, select **Email > Create New Email Message**. See [ISP Profiles](#) for more information.

To edit an existing email communication, select **Email > Communications** to open the Email Communications page. Click the name of the email communication you want to change. This opens **Edit Email Communications** wizard, which guides you through the steps of defining an email communication by completing a sequence of pages.

The **Edit Communication** wizard guides you through the completion of the following pages:

- Properties
- Targeting
- Offer
- Rich Content
- Text-Only
- Summary

After completing each page, click **Next Step** to advance to the next page until the offer is finished. After reviewing the information on the Summary page and making any necessary corrections, the next step is to change the status of the email communication from saved to submit. At this point, the email communication information is ready for review by your associates or for any formal approval process that your organization might have defined.

## Lifecycle

### Provide Prerequisites

Before you can complete the definition of an email communication, you might need to develop some or all of the following data components:

- Test list and/or Seed list. For more information, see [Test & Seed Lists](#).
- A high-quality list or a well-reviewed customer profile that targets receptive customers. (To avoid common email targeting mistakes, see the Email Communication: [List Page](#).)

- Offers and back-up offers that are live and available to your email recipients at the time when the email communication is being published.

**i Note:** Different practical factors can affect the dates when an offer starts and ends. For the purposes of analyzing the success of an email communication or a campaign, the dates of the live offers should fit within a distinct time frame. When you choose an email communication template, you might want to consider both practical and analytical constraints.

### Define the email communication with the **Edit Email Communication wizard**

An email communication is configured, designed, and scheduled using the **Edit Email Communication** wizard. This is a multi-step process that ensures all elements of the email are properly established before the email is approved and sent.

When all requirements are met, the status of an email communication can be changed from saved to pending. If approved, the status of the email communication status is changed to scheduled. On the date and time of the scheduled send, the status changes to live and the email is sent. If the email is only sent once, its status changes to completed. An email set up to send over multiple days stays live until the end of the publish window (that is, until the Pub End date).

If your organization has implemented a formal review process for email communications, you might decide that the change to approved status should depend on satisfactory completion of a final review or a formal approval process while the email is in pending status. Although the design of CRMS supports such procedural guidelines, such processes are not required or enforced by CRMS.

Email communications can be sent to either a list of customers, which is static, or to a profile. A profile dynamically generates a revised list every day. On the first publishing date, an email communications is sent to the current static list or to the profile-generated list. Thereafter, if sent to a profile, then the communication is sent to any customers who have been added to the profile-generated list; and this incremental mailing occurs every day when the email communication is being published.

Live offers mentioned in an email communication are made available to the targeted customers by links to the Reward-hosted Offer Showcase, or through at your store-site or through the TIBCO Reward microsite, or both, according to the schedule that you define.

After an email communication is published, delivery data about the email communication is gathered, analyzed, and summarized for the CRMS user. For each live or completed email communication, a dashboard display appears in the Email Communication Details

Summary page, showing the number and percentage of emails delivered, opened, clicked and bounced.

This email communication reporting data is calculated on a nightly basis. Please allow up to 24 hours for data to be updated.

## Email Communication: List Page

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.

To open the Communications page, select **Email > Communications** from the CRMS menu.

## Features and Fields

The Communications page includes the following features:

- The **Create > New Email Communication** option, which starts the Create New Email Communication process.

Each row in the list represents an email communication and displays a few key fields. These fields are lined up in columns. Click a column heading to sort all of the communications in the list by that field.

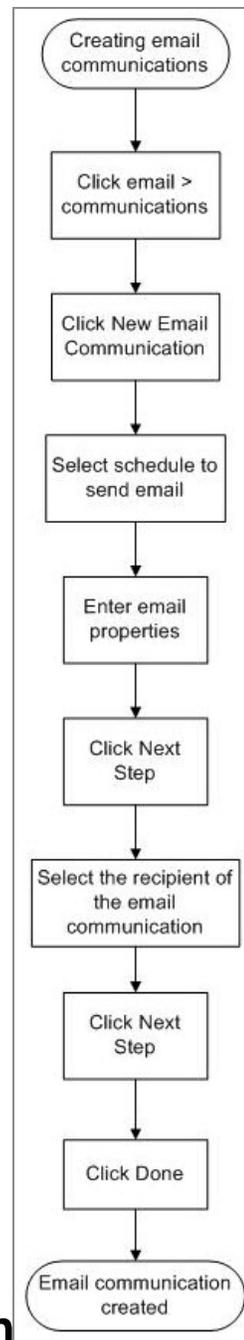
The Existing Communications panel displays the following fields:

- **Status** - You can see the current status of a communication, and also change the status of the communication when appropriate.
- **#** - The unique Communication record ID number, automatically assigned by CRMS when the record is created.
- **Communication Name** - The name of the communication as defined by the most recent update. The name is a hyperlink to the communication record, and it opens the record in the **Edit Communication Details** wizard.
- **Offer Status** - If an offer has been defined for this communication, this value reports

whether or not there is a problem with any of the offers. If there is a problem, there will be a hyperlinked Problem value in this column. Clicking **Problem** opens a pop-up window that displays the offers causing the problem.

**i Note:** The most common problem is that the dates for the offer are not compatible with the dates for the email. To avoid this, make sure that the offer is live within the publishing window defined by the start and end dates of the email.

- **In Campaign** - Identifies a campaign to which a communication has been assigned. Shows the default value, No, if a communication has not been assigned to any campaign.
- **Pub Start** - The publish start date of the communication. This is the first date on which the message can be sent to the defined recipients. A communication must be in scheduled status for it to be sent, so for an email to be sent on the publish start date, it must be approved on or before the publish start date. If an email is approved after the publish start date but before the publish end date, it is sent as soon as possible after the approval.
- **Pub End** - The publish end date of the communication. This is the last date on which the message is sent to the defined recipients. For one-time message delivery, this date is same as the publish start date. If the publish end date is different than the publish start date, each day the same message is sent to the new recipients who match the targeting definition, and who were not previously sent the message.
- **Open** - Displays the open rate of the communication as a percent. Shows n/a if the communication was never sent or if there are zero recipients.
- **Extract Stats** - You can generate a CSV file containing statistics on the responses for this email.
- **Clone** - You can clone the associated communication. All attributes of the original email communication, including targeting, are cloned to the copy. For details, see [Cloning Email Communication](#).
- **Delete** - You can inactivate the associated communication. The record remains listed, but its status is set to inactive.



## Creating Email Communication

Use the **Edit Communication** wizard to create a new email communication (sometimes called an "email message" for short) or to edit the details of an existing email communication. To use the **Edit Communication** wizard on an existing communication, click an existing communication listed in the **Communication Name** column in the Email Communications page.

## Procedure

1. Select **Email > Communications** in the CRMS menu.
2. Click **Create New Email Communications**.

There might be prerequisites for creating your email communication. See [Communications](#) for details.

The **Edit Communication** wizard guides you through creating email. You can also create a new email communication by cloning an existing email communication. Cloning is especially useful when you want to duplicate most of the attributes of the existing email message.

CRMS also sends out another form of email: the Trigger Event Response Email, sometimes called Trigger Email or Response Email. Response Email responds to trigger events. In general, Trigger Event Response Emails are used for customer service purposes and not so much for promotional purposes, as Email Communications are. However, both are forms of email, and there are similarities in the way they are composed, so the two can easily be confused by new CRMS users.

## Choose Template

You can use the Email Communication Template page to select an email template for your email message from a selection provided by TIBCO Reward. This page also gives you the option to use a blank template and insert your own content.

The first step in creating a new email communication is to choose an email template using the Email Communication Template page. To open this Template, select **Email > Communications > Create New Email Communication**.

 **Note:** You cannot go back to this template page after you have clicked **Next Step**. This means that you cannot switch to a different email communication template after you have chosen a template to use for an email communication.

Choose the type of template for your email communication:

- **Basic** - This tab includes two template options: Blank HTML and Text-Only.
- **Newsletters** - For communicating articles and other content of interest to your recipients.
- **Offers** - Designed to present multiple offers; also provides room for several

additional messages. Some Offer templates are designed to serve a specific strategic function.

- **Invitations** - Used to invite customers to store or other events.
- **Postcards** - Similar in shape and size to a printed postcard, this is the most commonly used format for single message emails. Creative elements fit well in the space, and the format leverages the benefits of a single message-per-email approach. High impact with minimal complication.

## Properties

If you are editing an existing email communication, the template has already been selected, and the wizard opens with the Properties page; otherwise, for new email message, the wizard opens first with the Templates page.

You can use the Properties page to define email data under three headings:

- Schedule
- Tracking
- Properties.

Use the Properties page of the **Edit Email Communication** wizard to establish when the email communication is sent and when it is tracked, and to assign the email a name, subject line, and any address data that remains the same on all emails (the **From Name** and **Address**, and the **Reply to Address**).

You can also use the Properties page to set up various properties of the email that are useful for administering, monitoring and assessing an email communication.

## Schedule

Specify when to send the email by responding to the following question in the **Schedule** section:

### **When do you want to send this email?**

- When a customer enters a mobile geolocation radius
- Today

- On a specific date

## Geolocation Trigger Events

If you click radio button next to **When a customer enters a mobile geolocation radius**, then you must specify Time of day to send this email:

- Today
- On a specific date

### **Note:**

- Beta capabilities enable the configuration of mobile geolocations that can be included in shopper profile targeting dimensions. 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 dimensions are included in a shopper profile, no shoppers qualify for offers or messages that use the shopper profile.

### Time of the day to send this email

- **Note:** If you choose **Today** and select As soon as possible from the pull-down menu, each email is sent from CRMS as it is built (customized) for each recipient. If you choose a time of day, the set of email messages are built in advance of the send time. At the send time, the process of sending the individual emails begins. Depending on the quantity of email, this can take some time. As soon as possible usually means that sending starts in about 20 minutes. As soon as possible on a future date means that sending starts at 12 a.m. Eastern time (9 p.m. Pacific Standard time on the day before the specified date.)

### Keep evaluating and sending this email?

**i Note:**

- If you choose "Yes, once a day until a specific date", the system reevaluates all of your target customer profiles every day to see if someone new matches the targeting profile. Each day, the system sends your email to these new customers, until the date specified.
- **Important:** If you are editing an existing email communication, the template has already been selected, and the wizard opens with the properties page. After an email template has been selected for an email communication, you cannot switch to a different template.

## Tracking

In the **Tracking** section, you can specify a range of dates (inclusive) when customer clicks on the URLs in an email communication for recording purpose.

**Tracking Dates** - These start and end dates define a period during which the links in the emails are monitored. Full tracking results are included in the clickthrough reports. Some tracking data, Opens and Clicks, are summarized in the Email Communication Summary page's Dashboard section, which is displayed for live and completed email communications.

If the CRMS user selects the Track all links check box in the Properties section of this page, the reports cover all links in an email; otherwise the reports cover only the links that are marked as trackable.

## Communication Properties

The following fields are used to assign to the email certain elements that are same on all email communications:

- **Email Internal Name** - This is the name used to identify a specific email communication record in CRMS. It is displayed in the **Communication Name** field in the Email Communication page. Use this field to assign or modify this name. (Although CRMS assigns a name by default, you and your associates should always customize this name to make it unique and easily identifiable. TIBCO Reward recommends that your organization should develop its own naming convention for these names.

- **From Name** - This is the name that is displayed in the **From** field in the address lines at the top of an email communication.\*
- **From Email Address** - This is the name that is displayed in the **From Email** field in the address lines at the top of an email.\*
- **Reply Email Address** - This is the name that is displayed in the **Reply** field in the address lines at the top of an email.\*

\* **Note:** Different email systems, and different options available in the same email system, can change the amount of information and types of information displayed to the email recipient at the beginning of each email. Some of these fields might not be displayed on an email recipient's emails, depending on the system and system settings in use by the individual.

**Subject** - This is the text that is displayed in the Subject line on email messages sent as part of this email communication.

The following fields are used to set up lists, campaign associations, link tracking, and outgoing email an internal name, address data that remains the same on all emails (the **From Name** and **Address**, and the **Reply to Address**), and a subject line:

- **Test List** - Use this drop-down field to specify which test list to use (optional). For details, see [Test & Seed Lists](#).
- **Seed List** - Use this drop-down field to specify which seed list to use (optional). For details, see [Test & Seed Lists](#).
- **Part of a Campaign** - Use this drop-down menu to specify which campaign (if any) this email communication is associated with.

If you associate an email communication with a campaign, all of the tracking data collected for the email communication is rolled up to the campaign reports. Several email communications can be associated with a campaign, and the campaign report can provide indications of how well each email communication succeeded in different ways.

TIBCO Reward recommends adding every communication to a campaign, even if there is only one message in the campaign. Reporting on control group behavior is currently only available for communications in a campaign.

**Track All Links** - Use this option to track clickthrough on all links contained in your email. This tracks all links in an email and displays the results in clickthrough reports. Some tracking data, Opens and Clicks, are also summarized in the Email Communication Summary page's Dashboard section, which is displayed for live and completed email communications.

Note that certain links cannot be properly tracked at this time. These include:

- Links with CSS or inline-style information - if your link has the form `<a class="classname [etc.] or <a style="color: [etc.]` then it does not convert properly.
- Area tags - If your link has the form `<area [etc.]` then it does not convert properly.
- Links with line breaks in the href - While hrefs should not contain line breaks, it is technically possible for them to occur. These are not converted to tracked links.

It is not necessary to name all of your links, but it is recommended if you wish to create clearer, easier to read reports. If you do not name your links, their URLs (some of them long and awkward to decipher) are displayed in reports instead.

To name links, use the "title" property in your links. For example, `<a href=http://www.loyaltylab.com title='Loyalty Lab'>Loyalty Lab Link</a>` displays 'Loyalty Lab' as the name for this link in reports.

When **Track All Links** is enabled on a URL that includes personalization, the report shows the link before the tag is resolved.

TIBCO Reward strongly recommends leaving the **Track All Links** options checked for every single message you send.

**Multipart MIME** - When this box is selected, each email is sent as a multipart MIME message. This means each recipient is sent in both a text and an HTML version. Their email client displays one or the other, depending on their local preferences.

Checking the multipart MIME box is a good practice, as it improves email delivery rates.

**Control Group** - Control groups are used in conjunction with Campaigns to determine and report incremental sales and response. CRMS randomly selects a control group composed of 5% of the target population, up to maximum of 10,000 email addresses. This control group does not receive the email message, and their behavior with respect to the contents of the email is used as a control for the purposes of evaluating the email's effectiveness.

Control Groups are only valid for communications targeted to at least 10,000 recipients, and then they make sense only if you link the email communication to a Campaign. A control group serves largely as a basis for comparing sales information, and you cannot report sales information and sales lift information unless you include the communication in a campaign.

**Internal Note** - Use this space to record notes to yourself and any associates who might work with this email communication.

# Target

The Targeting page displays estimated data about the emails in the currently defined target, and you can also specify profiles to be included and excluded.

Use the Targeting page of the **Edit Email Communication** wizard to establish to whom the email communication should be sent.

## Fields and Features

### Target Estimates

The Target Estimates component displays estimates based on your currently defined target. This information is just an estimate, as both targeting profile populations and list populations are calculated and updated on a nightly basis. To view all detailed estimates, click **More Details** to expand the display and show the following data:

- **Included Registered:** The number of registered customers that are targeted to receive this email.
- **Excluded Registered:** The number of registered customers that are excluded, based on profiles or lists set for exclusion.
- **Included Unregistered:** The number of unregistered customers that are targeted to receive this communication.
- **Excluded Unregistered:** The number of unregistered customers that are excluded, based on profiles or lists set for exclusion.
- **Offer Present:** The number of unregistered customers that are removed from the targeted set if the email includes an offer. This is due to the fact that offers cannot be sent to unregistered customers.
- **Invalid Email Addresses:** If there are malformed or invalid email addresses in the target pool, those addresses are removed from the final Emails to Send estimate.
- **Control Group:** If there is a Control Group defined for this communication, those customers are removed from the final Emails to Send estimate.
- **Emails to Send:** The sum of all the target estimates, this is effectively an estimate of the number of emails that are sent with the current settings.

### To whom do you want to send this communication?

You can choose to target to all registered customers, or choose to limit targeting to one or more selected Profiles and/or Lists.

To target all registered customers: choose All customers.

To target to selected profiles or lists: choose "Only selected Profiles or Lists". The screen changes significantly: a list is displayed, and you can select and add profiles and lists to target (that is, to which the email message should be sent). You can also create a new profile and add it to this list.

For information about selecting and adding targeting information, either to add include or exclude targets, which uses the same methods.

### **Should anyone be excluded from this communication?**

When one or more profiles or lists are chosen for exclusion, any customers that match any of those profiles or lists are excluded from the targeted set of customers, which is either "All customers" or the profiles or lists you have chosen to include.

To exclude profiles or lists: choose **Yes, selected Profiles and/or Lists**. Then click **Exclude Profiles or Exclude Lists** to launch the appropriate dialog box.

When you exclude profiles, only the dimensions of those profiles that have **Customer MUST match above criteria** selected affects the exclusion calculation. The Profile Chooser window shows you whether a profile has a **MUST match** dimension defined. Although you can choose to exclude a profile that does not have a **MUST match** dimension, it does not affect the exclusion calculation. Lists always exclude all of their membership.

## **Rich Content**

You can use the Rich Content page to see and edit the HTML code for the selected email template. You can also generate and add several different types of client and customer-specific elements to the email template.

In the Rich Content page, you can specify the dynamic fields and elements you want to add to an email, and then generate the personalization tag for these. You can then insert the personalization tag for each dynamic field into your email in the appropriate locations. Your email uses these dynamic fields to extract data from the extensive database of information maintained for your company by TIBCO Reward. The appropriate data is extracted and inserted into the email message for each customer, where it displays information selected for that customer.

For example, you can insert such elements as a field displaying the customer's first name, point balance, last award or award date; or elements of one of the offers that you selected in the Offers page of the **Email Communications** wizard, including an image; or a URL that links this customer to a questionnaire or to a refer-a-friend site (assuming you have set up the options to support these elements).

If you want to customize an email communication, the Rich Content page provides the basic code display and text editing environment that you need.

## Fields and Features

**Preview** [button] - Click this button to see a rendering of the displayed code for this email, as it is currently displayed in this Rich Content page. This rendering is displayed in the Email Preview dialog box. Be aware that, without a link to a real email recipient, it is impossible to address much of the content, and only a few elements of the template might be displayed.

- **Current Personalization and Default Personalization.** In the Email Preview dialog box, you can click **Current Personalization** to get a slightly better sense of how the text is displayed when an individual customer is associated with the email. Similarly, you can click **Default Personalization** to get a sense of how the text is displayed when no individual customer is associated with the email and the default values are displayed.

**Field Type** - Use this drop-down menu to choose the type of field code you want to generate. By first selecting the type of field you want to use, you narrow down the list of fields from which you can select. Your selection of **Field Type** can also change the other field selections you need to use, as follows:

- If you choose **General**, a **Default** data entry field is displayed in addition to the **Fields** drop-down menu. You can use this Default text entry field to specify some default text to be used if specific field data is not available for a specific customer.
- If you choose **Offers**, another (untitled) drop-down selection box is displayed after **Fields**. From this selection, choose each piece of Offer data to be generated; for example, the offer headline, description, qualification End date or expiration date.
- If you choose **Programs**, another (untitled) drop-down selection box is displayed after **Fields**. From this selection, choose a piece of fundamental main program data to be generated.
- If you choose **Trackable URL**, both a **Name** and a **URL** fields are displayed. Use these

to assign a name to the trackable field and the URL for that field, respectively.

**Field** - Use this drop-down menu to choose the field you want to generate. The Fields displayed are of the Field Type you selected.

If you have created a **Custom Attribute** field that records some unique piece of data about your customers, you can personalize your emails for each customer by adding this unique attribute to each email. Although **Custom Attribute** fields that you define in CRMS are not listed in the standard drop-down menus, they can be added to an email communication.

**Generate** [button] - Click this button to generate a personalization tag that you can insert into the email template.

**Generated** - This field contains the generated personalization tag, which represents the field, default data, program data, or name and URL that you selected. Copy the generated field and paste it into the template in the appropriate location.



**Note:**

- JavaScript is not allowed in email. Email clients do not allow the use of JavaScript within email due to security concerns. If you copy and paste HTML from a web page, be aware that it can contain JavaScript or other tags, such as Flash EMBED and OBJECT tags, that might not render as expected or can cause failure or rejection of the email.
- Few email clients correctly support CSS in email. It is a good practice to do formatting with inline style definitions and not classes.

## Reference Tags

To create email that addresses customers with personalized content and other loyalty-based content, you can include reference tags. Depending on their functions, they can also be called personalization tags, dynamic fields, or dynamic content tags.

The tags discussed in this topic are those that insert customer-specific data from the Reward database into your email communications. You simply add these pieces of HTML code (sometime called "tags" for short) into the Rich Content page in the Email Communication Wizard, or into the Content Item Rich Content page of the Content Item wizard.

**i Note:** Do not modify or add parameters to tags. Modifying tags can result in unexpected consequences. For example, adding parameters to the unsubscribe link can make it impossible for a customer to unsubscribe.

See also the Rich Content pages, which provide the means and methods that you use to select and generate tags and to paste them directly into the HTML code for an email message or content item.

Field Type	Field	Description and Comments
General	@(s:firstname)	First Name
General	@(s:lastname)	Last Name
General	@(s:emailaddress)	Email Address
General	@(s:streetaddress)	Street Address (lines 1 and 2)
General	@(s:city)	City
General	@(s:state)	State/Province
General	@(s:zip)	ZIP/Postal Code
General	@(s:retailershopperid)	ID of customer from client system
General	@(s:shopperid)	ID of customer in the Reward system
General	@(s:pointbalance)	Customer's available point balance. If point vesting is enabled, this does not include pending points
General	@(s:pendingpoints)	Pending points
General	@(s:monetary unit balance)	Customer's current monetary unit balance
General	@(s:savingstodate)	Customer's "Savings to date"

<b>Field Type</b>	<b>Field</b>	<b>Description and Comments</b>
General	@(r:companyname)	Client company name
General	@(r:companyurl)	Client company URL
General	@(s:lastaward)	Customer's last award earned
General	@(s:lastawarddate)	Date of customer's last award
Offers	@(o:description:#)	* Offer description
Offers	@(o:qualificationstring:#)	* Qualification Text
Offers	@(o:awardstring:#)	* Award Text
Offers	@(o:terms:#)	* Terms & Conditions
Offers	@(o:imageurl75:#)	* Image URL 65 x 65
Offers	@(o:imageurl65:#)	* Image URL 75 x 75
Offers	@(o:imageurl264:#)	* Image URL 264 x 264
Offers	@(o:imageurl400:#)	* Image URL 400 x 400
Offers	@(o:buyurl:#)	* Buy URL
Offers	@(o:shopperredemptionlimit:#)	* Shopper Redemption Limit
Offers	@(o:qualificationstartdate:#)	* Qualification Start Date
Offers	@(o:qualificationenddate:#)	* Qualification End Date
Offers	@(o:expires:#)	* Offer expiration

<b>Field Type</b>	<b>Field</b>	<b>Description and Comments</b>
Offers	@(o:clickurl:#)	* Landing Page URL
Email	@(c:fromname)	From Name
Tiers	@(c:fromemailaddress)	From Email Address
Tiers	@(c:replyemailaddress)	Reply Email Address
Tiers	@(c:emailsubjectline)	Subject Line
Tiers	@(u:unsubscribe)	Unsub link URL - goes to unsubscribe.aspx
Tiers	@(s:nexttierbenefits)	Next Tier Benefits
Tiers	@(s:nexttierdescription)	Next Tier Description
Tiers	@(s:nexttierentryvalue)	Amount to Next Tier
Tiers	@(s:nexttierheadline)	Next Tier Headline
Tiers	@(s:nexttiername)	Next Tier Name
Tiers	@(s:tierbenefits)	Current Tier Benefits
Tiers	@(s:tierdescription)	Current Tier Description
Tiers	@(s:tierentryvalue)	Current Tier Entry Value
Tiers	@(s:tierheadline)	Current Tier Headline
Tiers	@(s:tierlastevaldate)	Current Tier Evaluation Date
Tiers	@(s:tiermeasurevalue)	Current Tier Balance
Tiers	@(s:tiername)	Current Tier Name

Field Type	Field	Description and Comments
Tiers	@(s:tierresetdate)	Tier Reset Date
Awards	@(award:count)	Count - NOTE: This is no longer supported.
Awards	@(award:date) Date	Date
Awards	@(award:headline) Headline	Headline
Awards	@(award:productname) Product Name	Product Name - NOTE: This is no longer supported.
Awards	@(award:text) Text	Text
URLs	@(url:addressbookhelp)	Address Book Help - goes to home.aspx?P=help_address_book&rgd=@(RGD)
URLs	@(url:bulkunsubscribe)	Unsubscribe (no login) - goes to email_unsubscribe.aspx
URLs	@(url:myaccount)	My Account - goes to myaccount.aspx
URLs	@(url:myinfo)	My Info - goes to s_info.aspx
URLs	@(url:myoffers)	My Offers - goes to Offers.aspx
URLs	@(url:myshoppinglist)	My Shopping List - goes to ShoppingList.aspx

\* In the tag, :# refers to a particular offer slot, defined at the time you create your email within the Reward CRM Suite. The pound sign must be replaced with a number between 1 and 6, corresponding to the offer slot of your email. For example, the tag @(o:headline:2) would render the headline for the offer that is in the number 2 slot within a given email.

## Text-only

In the Text-Only page, you can see and edit the text only version of your email template. You can also generate and add several different types of client and customer-specific elements to the email template.

Before using the Text-Only page, you might want to click **Update from HTML** to bring in text from the HTML (Rich Content) version. This option strips out all of the HTML formatting and includes just the text from your rich content version.

In the Text-Only page, you can specify the dynamic fields and elements you want to add to an email, and then generate the code for these -- as appropriate for emails rendered in text-only format. You can then insert the code for each dynamic field.

Your email uses these dynamic fields to extract data from the extensive database of information maintained for your company by TIBCO Reward. The appropriate data is extracted and inserted into the email message for each customer, where it displays text information selected for that customer.

For example, you can insert such elements as a field displaying the customer's first name, point balance, last award or award date; or text associated with one of the offers that you selected in the Offers page of the Email Communications wizard; or a URL that links this customer to a questionnaire or to a refer a friend site (assuming you have set up the options to support these elements). You cannot insert images or formatted text.

## Fields and Features

**Preview** [button] - Click this button to see a rendering of the displayed code for this email, as it is currently displayed in this Text-Only page. This rendering is displayed in the Email Preview dialog box. Be aware that, without a link to an individual email recipient, it is impossible to address much of the content, and only a few elements of the template are displayed.

In the Email Preview dialog box, you can click **Current Personalization** to get a slightly better sense of how the text is displayed when an individual customer is associated with the email. Similarly, you can click **Default Personalization** to get a slightly better sense of how the text is displayed when no individual customer is associated with the email and the default values are displayed.

**Field Type** - Use this drop-down menu to choose the type of field code you want to generate. This narrows down to a reasonable number the list of fields from which you can

select. Your selection of **Field Type** can also change the other field selections you need to use, as follows:

- If you choose **General**, a **Default** data entry field is displayed after the **Fields** drop-down menu. Use this **Default** to supply default text to be used if specific field data is not available for a specific customer.
- If you choose **Offers**, another (untitled) drop-down selection box is displayed after **Fields**. From this selection, choose each piece of Offer data to be generated; for example, the offer headline, description, qualification end date or expiration date.
- If you choose **Programs**, another (untitled) drop-down menu is displayed after **Fields**. From this selection, choose a piece of fundamental main program data to be generated.

**Field** - Use this drop-down menu to choose the field you want to generate. The Fields displayed are of the Field Type you selected.

**Generate** [button] - Click this button to generate personalization tags that you can insert into the email template.

**Generated** - This field contains the generated personalization tag, which represents the field, default data, program data, or URL that you selected. Copy the generated field and paste it into the template in the appropriate location.

## Summary

The Summary page performs several functions:

- Provides an at-a-glance review of the email communication. This review summarizes progress on its development and you can see a one-click review of the data entered for each page in the wizard.
- You can see the email communication in either HTML or text-only presentation format.

## Fields and Features

### Preview

Clicking the **Preview** button displays a preview of the email communication

### Send to Test List

Click this button to send copies of the email message to the Test List. (Tests lists are defined using the Email Test and Seed Lists page.) Be aware that, when you send emails to your test list, the dynamically rendered URL Field tags in your email messages do not link correctly in the received emails.

**Summary bars** (blue bars) corresponding to each page in the Edit Email Communication wizard page sequence. The bar corresponding to a page might include an error message if there is a problem with the page.

- To see more page details, click the (down arrow) button to expand the summary display.
- To open and edit each page, click **Edit**.

## Cloning an Email Communication

Cloning an email communication record creates a copy of the record.

### Procedure

1. Find the email communication record you want to copy in the **Email > Communications** page.
2. Click **Clone** in the row of the communication record that you want. This opens the Edit Communication wizard.

The cloned copy of an email communication record includes all of the data in the original, including the template selection and the targeting data, with the exceptions noted as follows:

- The clone is assigned a new, unique numerical ID (which is listed in the "#" column). This is a system requirement.
- The clone of a record named "XXX" is automatically renamed "Copy of XXX."



**Note:** If you make multiple clones of "XXX," they are all named "Copy of XXX."

- The Pub Start date is, by default, re-set to the date following day when you create the clone.
- The Pub End date is, by default, always reset to a date one week and a day

after the initial Publish Start date.

- The status of the new clone is saved.

Tips for using a cloned offer record to create a new offer:

- Check the Pub Start and Pub End dates; in a clone, these are set to default dates.
- Assign the cloned copy its own new, unique, descriptive name.
- Review every field, and update fields to clearly distinguish the new clone from the original. Add an Internal Note to the clone, contrasting it from the original.

## Change Status

The current status of each email communication is displayed in the **Existing Communications** table on the **Email > Communications** page, in the email

communication status control that is displayed in the left-most column:



You also use this control to change the status of an email communication. If you click the down arrow in the offer status control box, the currently available options are displayed in a drop-down list. Select the new status; unless the change is blocked (for example, because some requirement has not been met), the email communication takes on the status you have selected.

## Status Details

Depending on the current status of an email communication, the options available to you in the Status control box change, as indicated in this table:

If Status is	you can select:
saved	submit
pending	approve or deny
scheduled	unapprove or launch

If Status is	you can select:
live	complete
inactive	saved

For example, if an email communication is in pending status, then you can either approve or deny the email communication. An approved offer is automatically published on its specified publish date, and the status changes to live at that time.

## Address Rules

The following rules apply to email communications:

- These characters cannot be the last character:

@ (at sign)

. (period)

- These characters cannot be the first character:

@ (at sign)

# (pound sign)

+ (plus sign)

& (ampersand)

, (comma)

/ (slash)

- Only one "@" (at sign) character is allowed.
- The domain name should end with two or more characters after the last period; for example: ".au" or ".com" or ".net"
- These characters and character combinations are not allowed:

.@

//

@.

..

"

--

- There must be a "." (period) character somewhere in the string following the "@" (at sign) character.

## ISP Profiles

The latest estimate is that 93% of all email traffic is spam, so clients should be very aware of how aggressive ISPs have become at managing and filtering spam.

### Email Source Issues

Email collected from any source other than your own website is fraught with peril. If you cannot pass a basic audit on an email address (requesting IP and date of request), you expose yourself to issues if you are ever called out for violation of anti-spam legislation such as the CAN-SPAM act, EU Opt-In Directive, or CASL, and so on. Even if you can, the quality of emails from outside sources is substantially lower than those collected internally.

In addition, emails collected via sweepstakes, in store events, partner events, and other locales where providing the address in order to receive an incentive are of much lower quality.

Why is this important? Because bad addresses cause hard bounces, which are a signal to ISPs that a sender is a spammer. If you have not been opting out hard bounces, or soft bounces after a series of consecutive bounces, you are behaving like a spammer would, which is noticed by the ISPs spam filter algorithms very quickly.

In addition, if you are harvesting email from anywhere, for any reason, you are both violating CAN-SPAM, EU Opt-In Directive, or CASL (no opt in) as well as picking up spam trap addresses that are seeded all over the Internet to spot this exact practice.

### Personal Whitelists

When a recipient indicates that a sending domain is safe or known, the ISP creates what is known as a personal whitelist. Future email from that domain is delivered to the inbox. Over time, this improves overall delivery, as more and more individuals add you to their safe sender list.

When you first start sending email through Reward, none of your recipients have you added to their personal whitelist. This takes time to overcome, and reduces your inbox delivery and overall open and clickthrough rates.

### **Basic checks for a clean list**

It is important to start emailing on a new IP address with a clean list. Customers that use a clean list see over 90% of their emails delivered in the In box. While maintaining a clean list is an ongoing effort, there are a few simple steps you can do before you start sending with Reward.

The most basic check is to verify that the list of addresses does not include addresses that start with any of the following:

- email
- noe (for noemail)
- spam
- nos (for nospam)
- post (for postmaster)
- abuse
- support
- zzz
- xxx
- and potentially a lot of the triple letters.

This simple step gives you a better understanding of the quality of your list before you start sending with Reward.

## **Campaigns**

## About Campaigns

You can use campaigns to define a set of related email communications associated with a marketing campaign and to track the responses and sales associated with this set of emails.

The results of a campaign are summarized in the campaign dashboard, and details are provided in an extensive set of campaign reports.

Campaign management reporting data is calculated on a nightly basis. You must wait up to 36 hours for population data to be updated, after it has reached .

To open the Campaigns page, select **Email > Campaigns**.

## Fields and Features of Campaigns

The Campaigns page includes the following features:

- The **Create > New Campaign** option, which starts the Create New Campaign process.
- The Existing Campaigns panel consists of:
  - Standard navigation controls - the **Show** filter and the **1 2 3** page controls.
  - The complete list of existing campaigns.

Each row in the list represents a campaign record and displays a few key fields. These fields are lined up in columns. Click a column heading to sort all the campaigns in the list by that field.

The following campaign fields are displayed:

### Status

Use this control to see the current status of a campaign, and to change the status of the campaign when appropriate.

### #

The unique campaign record ID number, automatically assigned by CRMS when the record is created.

## Campaign Name

The name of the campaign as defined by the most recent update. The name is a hyperlink to the campaign record, and opens the record, usually displaying the Email Campaign Details page.

## Communication Status

If an email communication has been associated with this campaign, this value reports whether or not there is a problem with the email. If the word "problem" is displayed, click the linked campaign name in this row to open the Campaign Summary page, and then address the problem in the email. For example, if the offer in the email ends before the campaign starts, you can change the offer or select a different offer.

## Pub Start, Pub End

The Pub Start date and Pub End date define the start and end of the campaign. All email communications to be included in a campaign must be published within these start and end dates. An email communication that is part of a campaign cannot start before the campaign's Pub Start date or end after the Pub End date.

You define the Pub Start and Pub End dates in the Campaign Properties page, in the "Dates" start and end fields. The Campaign Properties page is displayed immediately after you click **Create New Campaign**. Note that the Pub Start and Pub End dates might be different than the campaign tracking dates. Sales summaries for a campaign (example, Campaign Summary Reports) show sales data for the period defined by the tracking dates.

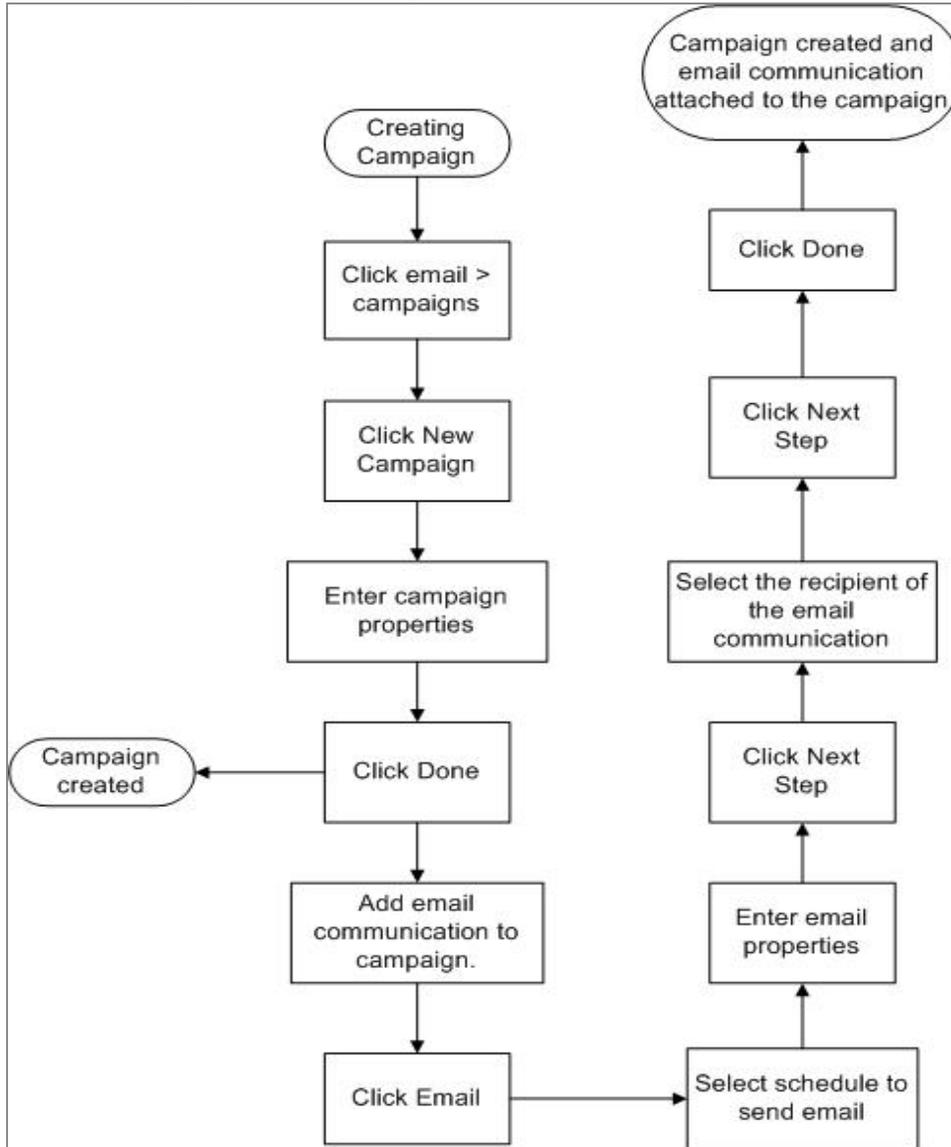
## Author

Displays the name of the CRMS user who authored the campaign (the user who was logged in).

## Delete

Use to inactivate the associated campaign. The record remains listed, but its status is set to inactive.

## Creating Campaigns



Use a campaign to define a set of related email communications and to track the sales that result from these email communications. The results of a campaign are summarized in the campaign dashboard, and details are provided in an extensive set of campaign reports.

### Procedure

1. Open the **Email > Campaigns** page and click the **Create > New Campaign** link.

This opens the Edit Campaign page, which you use to define the name and important

dates for the campaign, along with the notes on the campaign for internal use.

2. After you click **Done**, you can create email communications to be associated with the campaign.

You can also create a new campaign by cloning an existing campaign. Cloning is especially useful when you want to duplicate attributes or features of an existing campaign.

## Campaign Properties

Use the Campaign Properties page to define the name of the campaign and to establish key dates for the campaign. The date indicate when the email communications that are part of this campaign can be sent, and when the campaign formally starts and ends for the purpose of reporting.

## Fields and Features of Campaign Properties

The Campaign Properties section includes the following data:

### Campaign Name

Use this internal name to identify a campaign in CRMS. It is displayed in the **Campaign Name** field in the **Email > Campaign** page. Use this field to assign or modify this name. Although CRMS might assign a name by default, you and your associates should always customize this name to make it unique and easy to distinguish from others. Clients should develop their own naming conventions for campaign names. Campaign name example: 2012 Q1WinterCloseOut1 Snowflake.

### Dates

These dates are displayed as the **Pub Start** and **Pub End** Dates on the initial **Email > Communication** page. All emails to be included in a campaign must be published (sent) within these campaign dates. These dates thus provide an indication of which emails were included in the campaign. To enter a date, click a calendar icon to open the calendar date selector, then click a date to select it. The Pub Start and Pub End dates can be different than the campaign tracking dates, although they are typically set to be the same by default.

## Tracking Dates

The tracking dates define the time period for which sales are tracked for this campaign. Sales during the campaign tracking period are summarized in the campaign summary reports. To enter a date, click a calendar icon to open the calendar date selector, and then click a date to select it. The Campaign Summary Report includes summary data for all the campaigns with any tracking dates within a specified timeframe, for example, the month of May. (Specify the timeframe when you request the report.)

## Internal Notes

Use the internal notes to record notes about the campaign.

# Campaign Details

The Campaign Details page provides basic information and status updates about a campaign, including any email communications currently associated with the campaign. You can add a new email communication directly to the campaign using the Edit Email Communication wizard.

The Campaign Details page opens immediately after you successfully complete the Campaign Properties page and click **Next Step**.

If you have already provided the campaign data required by the Campaign Properties page, the Campaign Details page opens immediately when you click the name of a campaign in the **Email > Campaigns** page.

## Fields and Features of Campaign Details

The Campaign Details page includes the following features, each of which is accessible by clicking a down arrow located on the right edge of the blue summary bar:

- The **Dashboard** view displays key information and a status update about the campaign that include response and sales data.
- The **Properties** view presents a quick review of the data you entered in the Properties page. To edit this information, click **Edit**. For information about the data in this view, refer to [Campaign: Properties](#).
- The **Communications** view lists the email communications currently associated with the campaign. You can also add a new email communication directly to the campaign. If the

communications summary bar indicates that you have "No Communications", this campaign is incompletely defined.

To add an email communication to the campaign immediately, click **Add a New Communication > Email**. This opens the Edit Email Communication wizard. You can use this wizard to create a new email communication. After you have defined the new email communication, reopen the campaign.

To add an email communication in a separate session, including an existing email communication, you can create or edit an email by starting from the **Email > Communications** page. To add an existing email communication to a campaign, click the email to open it in the Edit Email Communications wizard. The Email Communication Properties page is displayed. Use the **Part of Campaign** drop-down menu (near the bottom of the page). Select the campaign to which the communication should be added, and then click **Save**.

Confirm that each email communication has been correctly added to the campaign by opening the **Communications** view in the Campaign Details page.

## Trigger Events

### About Trigger Events, Response Email, and Stationery

Trigger events, Trigger Event Response Emails (response email or trigger emails), and stationery are the basic components of a CRMS feature that uses email to deliver customer support messages. These email messages are generated in response to trigger events.

### Trigger Events

A trigger event is an event that can be addressed with a customer service email.

The trigger event might be a customer registration, a request, a confirmation of the completion of a process or arrival at a threshold, an availability or expiration date, a reminder date, or any of several other events to which a client wants to automatically respond.

For example, the "Forgot Password" response email message is set up and administered by using the trigger events system. These emails are automatically sent out when the triggering event occurs (a customer signal that the user forgot his password).

**i Note:** Trigger event response emails are not the same as email communications. Email communications are typically marketing emails that are sent to a targeted group of customers on dates that you explicitly choose, often in connection with a campaign. Although some trigger event response email behave similar to email communications, these different classes of email are separately managed.

**Warning!** Avoid disabling a trigger event that is currently enabled. Currently enabled trigger events are crucial for the smooth and continuous operation of your loyalty system.

## About Trigger Event Response Emails

Using CRMS, you can set up a response email to respond to a trigger event. The CRMS provides a standard response email that you can clone, customize, and personalize in several ways. For example, many clients set up their own alternate response email in CRMS by designing their own corporate stationery format and assigning this stationery to their response email.

- i Note:**
- All email generated and sent by CRMS includes **From** and **Reply To** fields. Before you set up any email, define the text to be used in these fields, using the **Email > Settings** page.
  - To change either the response email associated with a trigger event or the stationery associated with such a (live) response email, create a clone of the response email associated with the currently enabled trigger event, and then work with the clone and test it until it is ready to go live. Then substitute it for the current response email without disabling the trigger event.

**Warning!** Although you can "disable" the trigger event and work on the current response email, this approach stops all email responses to this trigger event, which has potentially harmful results.

### What is Stationery?

You can use stationery to change elements of a trigger event response email, such as the header and footer or a graphic element, without touching the content of the email itself. Stationery is used solely with trigger events. Note that stationery formats are not available as templates in email communications.

# Trigger Event Descriptions

The following email trigger events are available:

## **Welcome**

A new customer has signed up for your program online on the Microsite or through APIs. This email welcomes the new customer, and it can include a reiteration of program benefits.

## **External Registration**

A new customer has signed up for your program at a store or during a transaction. Importing transaction or shopper files triggers this email, which welcomes the new member. This message can include a reiteration of program benefits.

## **Award Earned**

The customer has earned a new award. This email informs the customer of the award.

## **New Password Request**

The customer has forgotten their password. This email sends a new random password to the customer. The customer can change their password after signing in.

## **Award Reversed**

The customer no longer qualifies for an award previously earned. This email informs the customer of the award reversal.

## **Registered Card Expiring**

A member's registered card (credit, loyalty, debit, or other) expires at the end of the month. This email suggests to the member, to visit the member portal and update the card information.

## **Shopper Information Updated**

The customer has changed one or more elements of their profile. This email confirms the changes and includes the specific elements changed.

## **Email Address Change Requested**

The customer has requested a change to their email address. This email is sent to the new email address to confirm the change. The email address does not change until the customer clicks on a link within the email.

### **Friend Referred**

A customer has referred a friend to join your program. This email invites the friend to join your program.

### **Next Tier**

The customer has changed tiers and now belongs to the next tier up. This email informs the customer of their new tier association.

### **First Reminder**

This email reminds the shopper of an occasion.

### **Second Reminder**

This email reminds the shopper of an occasion.

## **Trigger Event List Page**

Select **Email > Trigger Events**. Use this page to set up email messages (trigger event response emails) that your customers receive when certain trigger events take place (for example, new password request, new offer available). These response emails are automatically sent out when the triggering event occurs.

The Trigger Events page has the following features:

- You can generate response emails through the standard trigger events.
- You can enable or disable specific response emails.
- You can view and edit response emails.
- You can send a response email to a test list.

CRMS identifies 18 trigger events that are commonly associated with these customer service emails. There is no limit to how many of these trigger events can be enabled or disabled at one time. However, at least one message must be assigned before the event can be enabled.

## **Features and Fields of Trigger Events**

The Trigger Events page includes the following features:

The Edit Address Settings option, labeled **Click here to edit your From, To, and Reply email address settings**. Clicking this link opens the Email Settings page. In this page, you can define the following email settings that are displayed, by default, for each email response :

- **"From" Email Address**
- **"From" Name**
- **"Reply" Email Address**
- The Trigger Events panel, which displays a list of all trigger events that have been defined or are in the process of being defined.

Each row in the Trigger Events list represents a trigger event and displays a few key fields. These fields are lined up in columns. Click a column heading to sort all of the trigger events in the list by that field.

**The following Trigger Events fields are displayed:**

- **Enabled/Disabled Status** - You can use this control to see the current status of a trigger event, and to change the status of the event when appropriate.

**Warning!** Changing the trigger event status from enabled to disabled has potentially harmful consequences.

To enable or disable a trigger event, change the status setting in the drop-down list to the left of each event name. When an event takes place, and the event is enabled, the response email assigned to this event is sent to the customer. If the event is disabled, no email is sent when the event occurs.

**i Note:** It is a good practice to send the response email, which has been assigned to a trigger event to a test list prior to enabling that trigger event.

- **Trigger Event** : the name of each trigger event available in CRMS. Click this name to change or view the properties of a trigger event. The Manage a Trigger Event page is displayed. You can create a new response email for the event or choose from existing response emails.

Note that some trigger events in this list might no longer be supported. For an updated list of the trigger events, including information on their current availability and a brief explanation of the purpose of each, refer to [Trigger Events](#).

- **Assigned Response Email** : this is the response email that the customer receives

when the event takes place.

- **Preview** : click this link to preview the email for a trigger event.
- **Send to Test List** : click this button to automatically send the assigned message to a preselected list. You are not asked to confirm this action.

## Manage Trigger Event

To open the Manage a Trigger Event page, click the event name in the **Email > Trigger Events** page, which displays the current data for that trigger event. Use this page to create, assign, and manage response email message content for a trigger event.

 **Note:** Some trigger events in this list might no longer be supported.

For an updated list of the trigger events, including information on their current availability and their purpose, refer to [Trigger Events](#).

## Features and Fields of Manage a Trigger Event Page

### Properties:

- **Description** : this explains the specified trigger event that triggers the email message you assign. This description might also describe the kind of information included in the response email.
- **Event Status** : reflects the current status: a reminder indicating whether the event is currently enabled or disabled.

**Warning!** Avoid disabling a trigger event that is currently enabled. Some trigger events are crucial for the smooth and continuous operation of your loyalty system.

- **Bulk Email** : includes notes regarding response emails and customers' bulk email settings. Some events observe these bulk email settings and some do not. This is a reminder that the event response email is a service email and not subject to bulk email settings.

# Response Email

## About Response Emails

A response email is sent in response to a specific trigger event. For example, an "Award Earned" email response might be sent in response to the "Award Earned" trigger event.

Using CRMS, you have the option to set up an email to respond to a trigger event. CRMS provides a standard response email that you can clone, customize, and personalize in several ways. For example, many clients set up their own alternate response email in CRMS by designing their own corporate stationery format and assigning this stationery to their response email.

 **Note:** All emails generated and sent by CRMS include **From** and **Reply To** fields. Before you set up any email, define the text to be used in these fields through the **Email > Settings** page.

## Creating Response Email

### Procedure

1. Select **Email > Trigger Events**.

A list of trigger events is displayed.

2. From the list, select a trigger event that is disabled.

The Manage a Trigger Event page is displayed for that trigger event.

3. To modify the email that is used with an enabled trigger event, see trigger event: [Change Response Email](#).

4. In the Responses section of the page, select **Create a New > Response Email**.

The Edit a Trigger Event Response Email wizard is displayed. This wizard guides you through the following steps for response email creation:

- [Properties](#)
- [Rich Content](#)
- [Text-Only Content](#)
- [Summary](#)

## Properties

The first step in the wizard is the Properties page. You can edit following fields on this page:

### Internal Name

This field is required. Assign a name to the email response. This name is used to identify the response email and differentiate it from other response emails associated with the same trigger event. Only CRMS users see this name. Your customers do not see this name.

### Subject

This is the subject line that your customers see in their email in boxes. This field is required. You can insert the following variables in this field to personalize the subject line for the recipient:

@(s:firstname) - customer's first name

@(s:lastname) - customer's last name

@(s:emailaddress) - customer's email address

@(s:city) - customer's city

@(s:state) - customer's state/province

@(s:zip) - customer's zip/postal code

### Internal Notes

Use the **Internal Notes** field to identify the purpose and unique features of the email for yourself or your colleagues. Only the CRMS users can see this information. Your customers cannot see this internal note.

## Rich Content

In the Rich Content page of the wizard, you can create the email content and edit the HTML version of your email.

To preview what your customer sees, click **Preview** underneath the page heading.

## Text-Only Content

In the Text-only Content page of the wizard, you can edit the text version of the email for customers who have opted to block HTML from their inboxes.

## Summary

Summary is the final step in the wizard. You can review the information and content, which you entered at each previous step, and edit that content.

Click the arrow located on the right side of any step of the summary to expand that section and view the contents.

Click **Edit** on any step of the summary to modify the setting for that step.

## Change Response Email

The following are some methods to change the response email associated with a trigger event:

- [Change the response email that is assigned to the Trigger Event](#)
- [Clone the response email, modify the clone, then choose that response email](#)
- [Create a new response email and then assign it to the Trigger Event](#)

**i Note:**

- The difference between email communications and response emails are the following:
  - Email communications are emails that a marketer sets up, and then they are tied to customer targeting profiles to determine who gets the email (these are generally marketing emails).
  - Response emails are emails that a marketer sets up, and then they are tied to trigger events. These are not so much of marketing emails (though they could be), but are basically system generated emails based on whatever the trigger is, such as moving from one tier to another.
- If the trigger event is enabled, the existing response email cannot be edited: you can only change the response email for trigger events that are disabled.
- Avoid disabling a trigger event that is currently enabled. Although you can disable the trigger event and work on the current response email, this approach effectively stops all email responses to this trigger event, which has potentially harmful results.

## Changing the Response Email Assigned to the Trigger Event

### Procedure

1. Select **Email > Trigger Events**.

A list of trigger events is displayed.

2. From the list, select a trigger event that is disabled.

The Manage a Trigger Event page is displayed for that trigger event.

3. In the Responses section of the page, select a different response email than the one already assigned to the trigger event. (The assigned response email is highlighted and its radio button is selected.)

4. At the top of the page, click **Save** to save your work or **Done** to save your work and return to the list of trigger events.

The alternate response email is now assigned to the trigger event.

## Cloning the Response Email, Modifying the Clone, and then Choosing that Response Email

### Procedure

1. Select **Email > Trigger Events**.

A list of trigger events is displayed.

2. From the list, select a trigger event that is disabled.

The Manage a Trigger Event page is displayed for that trigger event.

3. In the Responses section of the page, click **Clone** on the row of the assigned response email. (The assigned response email is highlighted and its radio button is selected.)

The clone of a record named "XXX" is automatically renamed "Copy of XXX," in the Edit a Trigger Response Email wizard.

4. The wizard walks you through editing the following aspects of the assigned response email:

- Properties
- Rich Content
- Text-only Content
- Summary

5. In the Properties step, you can edit **Internal Name** and **Subject**.

6. Click **Next Step** to display the Edit Rich Content page.

7. In the Rich Content page, click **Generate** to generate a personalization tag that you can insert into the email template.

After you click **Generate**, the values that you selected are displayed in the **Generated** field.

8. Copy the generated field text and paste it in the template in the appropriate location.

**i Note:** JavaScript is not allowed in the email. Email clients do not allow the use of JavaScript within email due to security concerns. If you copy and paste HTML from a web page, be aware that it can contain JavaScript or other tags, such as Flash EMBED and OBJECT tags, that might not render as expected or can cause failure or rejection of the email.

9. Click **Next Step** to display the Text-only Content page.
10. In the Text-only Content page, click **Generate** to generate a personalization tag that you can insert into the email template.  
After you click **Generate**, the values that you selected are displayed in the **Generated** field.
11. Copy the generated field text and paste it into the template in the appropriate location.
12. Click **Next Step** to display the Summary page.  
The Summary page shows the settings entered in the previous steps of the wizard.
13. Click **Edit** next to any step, and you are directed to that step of the wizard where you can modify settings.
14. Click **Preview** to see how your email looks.
15. Click **Send to Test List** to send a test email to a specified email list.
16. Click **Save** to save your work. Click **Done** to save your work and return to the Manage a Trigger Event page.  
The cloned email response is displayed in the list of response emails.
17. Select the radio button next to the newly cloned email response.
18. Click **Save** to save your work or **Done**.  
The cloned email response is now assigned to the trigger event.

## Creating a New Response Email and Then Assigning It to the Trigger Event

### Procedure

1. Create a response email. Refer to [Creating Response Email](#) for instructions about how

to create a response email.

The new response email is displayed in the list of response emails in the Manage a Trigger Event page.

2. Select the radio button next to the newly created email response.
3. Click **Save** to save your work or **Done**.

The new email response is now assigned to the trigger event.

## Stationery

### About Stationery

Use stationery to change elements of a trigger event response email, such as the header and footer or a graphic element, without touching the content of the email itself.

Stationery is used solely with trigger events. Stationery is especially useful when you want to change the theme of a response email for events or holidays without editing the email content itself.

**i Note:** Stationery formats are not available as templates in email communications.

#### Features and Fields

Select **Email > Stationery** to access the Stationery page, that includes the following features:

- The **Create > New Stationery** option, that creates a new stationery and initiates the Edit a Stationery wizard.
- The trigger events stationery panel, that includes a complete list of existing stationery. Each row in this list represents a stationery definition and displays a few key fields in columns. Click a column heading to sort all of the stationery definitions in the list by that field.

The following fields are displayed:

### **Name**

The name of the stationery as defined by the most recent update. The name is a hyperlink to the stationery record, and opens the record in the Edit a Stationery wizard.

If a stationery name is displayed in gray letters and the stationery record does not open in the Edit a Stationery wizard when you click it, this stationery is "live". Live status means that a stationery is currently associated with an enabled trigger event response email. You cannot work on stationery in live status; you can either clone it and work on the cloned stationery, or you can disable all trigger events with response emails that use this stationery. Disabling all such trigger events changes the stationery status to "assigned" and you can then edit the stationery. To use the modified stationery, you must re-enable the trigger events to use the modified stationery. If you edit a clone, you can assign it to the trigger event response email without disabling the trigger event.

### **Status**

You can see the current status of a stationery definition.

### **Live**

Indicates that the stationery is assigned to a trigger event response email and is currently being used.

### **Assigned**

Indicates that the stationery is currently assigned to a trigger event response email.

### **Unassigned**

Indicates that the stationery is not currently assigned to a trigger event response email.

### **Last update**

The date and time stamp applied and maintained by CRMS to indicate when each stationery definition was last updated.

### **Preview**

Displays a preview of the stationery.

### **Clone**

Use the clone option to create a duplicate of a stationery record. The cloned copy of a stationery duplicates all of the data in the original, with certain exceptions.

The clone of a stationery record named "XXX" is automatically renamed "Copy of XXX". If you make a clone of "Copy of XXX", it is named "Copy of Copy of XXX"

The status is "Unassigned".

The **Last Update** field reflects the date and time when the new clone was created.

### **Delete**

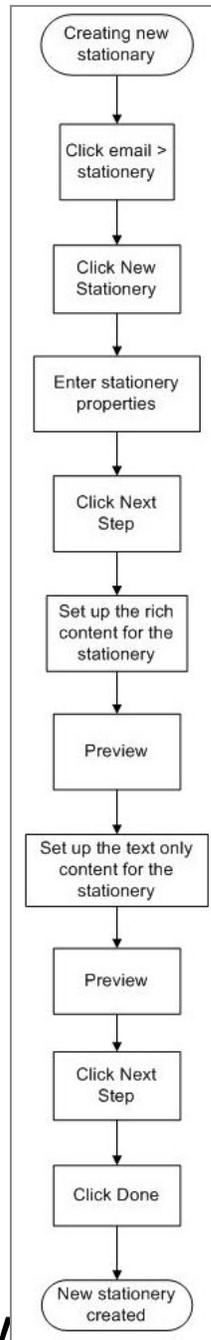
Deletes the stationery.

## **About Stationery Creation**

To create a new stationery, select **Email > Stationery > Create New Stationery**. This creates a new stationery record and starts the Edit a Stationery wizard. This wizard helps you define the new stationery by guiding you through the completion of the following pages:

- Stationery Properties
- Stationery Rich Content
- Stationery Text-Only Content
- Stationery Summary

You can also create a new stationery by cloning an existing stationery. Cloning is especially useful when you want to duplicate most of the elements of the existing stationery. It also provides an alternative to editing an original stationery design that should remain in use (in live status).



## Creating Stationery

### Procedure

1. Select **email > stationery**.
2. Select **create > New Stationery**.

CRMS creates a new stationery record and starts the Edit Stationery Details wizard.

The wizard opens its first page, titled Properties, showing the new stationery record. The new record contains no data except for a unique, CRMS-generated stationery name. Replace this stationery name, which is just a place holder.

3. Click **Next Step** and complete the new stationery design by using the Edit a Stationery wizard to finish the process.

## About Editing Stationery

Use the Edit a Stationery wizard to change the details of an existing, saved stationery or to set up a new stationery.

To use the Edit a Stationery wizard to work on an existing stationery design, click the name of that stationery in the **Email > Stationery** page.

To create a new stationery and immediately start the editing process, open the **Email > Stationery** page and click **Create New Stationery**. The wizard opens, ready to start editing the new stationery.

The Edit a Stationery wizard guides you through the process of completing the following required steps:

- Stationery Properties
- Stationery Rich Content
- Stationery Text-Only Content
- Stationery Summary

You can also create a new stationery by cloning an existing stationery. Cloning is especially useful when you want to duplicate most of the elements of the existing stationery. You can use cloning to work on the response emails or stationery associated with trigger events without disabling events.

**i Note:**

- To edit stationery that is currently associated with an enabled trigger event, it is a good practice to create a clone of the original stationery that requires changes, and then work on that clone. When the clone includes all the changes that you want, switch to the properly modified clone. This is an alternative to editing the original itself, which requires you to disable the associated trigger events. Disabling a trigger event can result in undesirable consequences.
- You can minimize downtime by creating a clone of an original stationery that requires changes, and then working on that clone. This is an alternative to editing the original itself, which requires you to disable the associated trigger events. When the clone includes all the changes that you want to make to the original, you simply switch to the properly modified clone.
- To switch the response email or the stationery associated with a response email, click the name of the trigger event in the **Email > Trigger Events** page to open the Manage a Trigger Event page. You can assign a different response email (if available) or select a different stationery to be used for the response email. Be sure to click **Save** immediately after making any changes.

## Stationery Properties

Use the Stationery Properties page in the Edit a Stationery wizard to record the internal name and internal notes that identify the stationery and its purpose. Note that this data is used internally: customers never see this data. Defining and saving the name and internal note text is the first step in creating a new stationery or editing an existing stationery.

### Fields

Use the Properties page to name and describe a stationery by recording data in the following fields:

- **Internal Name** is an internally used name that the customer does not see. It serves to identify and describe the stationery record in the Manage a Trigger Event page, so that you can select the correct stationery to use with a trigger event response email. Choose a name that is descriptive and unique. Ideally, the new name should indicate the purpose of the stationery and why it should be used rather than another

stationery. Replace the CRMS-provided stationery name as soon as possible in the process of defining the new stationery.

- **Internal Note** text is used internally in CRMS, and is displayed only on this page. Ideally, the notes should help distinguish the associated stationery from any other stationery and prevent confusion. If two or more stationery designs have similar names or the names do not indicate the unique purposes of the different stationery designs, you should use the **Internal Note** field to record the crucial aspects of a stationery that make it different.

After finishing work on this page, click **Next Step**. This saves your work and advances the wizard to the Stationery Rich Content page, the next step in the workflow of the wizard.

 **Note:** When you open the Properties page, always review any default data and preexisting data. Remove unwanted data and add correct new data.

## Stationery Rich Content

Use the Stationery Rich Content page in the Create a Stationery wizard to set up the rich content for the current stationery. The rich content established in the stationery affects every response email that used this stationery, and every customer can see the results. For this reason, it is a good practice to test this stationery thoroughly, and to send it to a test list before you make it available to a real customer.

During the normal process of creating a stationery, the Rich Content page opens after you complete the Stationery Properties page and click **Next Step**. You can also navigate to the Rich Content page from other pages in the Create a Stationery wizard by selecting the page in the drop-down **Jump to Step** menu.

Use the Rich Content page to see and edit the code for the selected stationery. It also generates code for several different types of client and customer-specific data and you can also add this code to the stationery. The following are examples of code that can be generated and added to the stationery:

- Company Name
- Company URL
- Point balance
- Monetary Unit balance

- Terms and Conditions
- Customer Service URL
- Return email elements (From Name, From email address, Reply email address)
- URLs that customers commonly want to navigate to, such as the Signup, My Account, My Offers, Main Program, Questionnaire, Refer a Friend, and so on.

Insert the code for each dynamic field into your stationery in the appropriate locations. Your trigger event response email uses these dynamic fields to extract data from the extensive database of information maintained for your company by Reward. The appropriate data is extracted and inserted into the stationery for each customer, where it displays information selected for that customer.

## Fields and Features

### Preview [button]

Click to see a rendering of the displayed code for this stationery, as it is currently displayed in this Rich Content page. This rendering is displayed in the Preview dialog box. Be aware that, without a link to a real response email recipient, it is impossible for the preview version to address much of the content, and only a few personalized elements of the stationery can be displayed. In the Preview dialog box, you can also select text-only content to get a sense of how the text is displayed when the email is in the text-only format.

### Field Type

Use this drop-down menu to choose the type of field code you want to generate. This narrows down the list of fields to a reasonable number, from which you can select. Your selection of **Field Type** might change the other field selections available for you to select from.

### Field

Use this drop-down menu to choose the field you want to generate. The fields displayed are of the **Field Type** you selected.

### Generate [button]

Click to generate code that you can insert into the stationery.

## Generated

Contains the generated code, which represents the field, default data, program data, or name and URL that you selected. Copy the generated field and paste it into the stationery in the appropriate location.

**i Note:** JavaScript is not allowed in email, and so is not allowed in the stationery. All modern email clients disallow the use of JavaScript within email due to security concerns. If you copy and paste HTML from a web page, be aware that it can contain JavaScript or other tags, such as Flash EMBED and OBJECT tags, that might not render as expected or can cause failure or rejection of the email.

## Stationery Text-Only Content

Use the Text-Only Content page to see and edit the text-only code for the selected stationery. This Text-Only Content page addresses the case where the email associated with the stationery is rendered in text-only format by the customer's email viewer.

You can also use the Text-Only Content page to generate and add several different types of client and customer specific elements to the stationery. You can specify the dynamic text-only fields and elements you want to add to an email, and then generate the code for these. You can then insert the code for each dynamic field into the appropriate location in your email. Stationery uses dynamic fields to extract data from an extensive database and to display text information selected for each customer.

**i Note:** Before using the Text-Only Content page, click the **Update from HTML** button to bring in text from the HTML (Rich Content) version. The HTML version might contain text-only content.

## Fields and Features

### Preview [button]

Click this button to see a rendering of the displayed code for this stationery, as it is currently displayed in this Text-Only Content page. This rendering is displayed in the Preview dialog. Be aware that, without a link to a real response email recipient, it is impossible for the preview version to address much of the content, and not all personalized elements of the stationery are displayed.

## Field Type

Use this drop-down menu to choose the type of field code you want to generate. This narrows down the list of fields to a reasonable number from which you can select. Your selection of **Field Type** can change the other field selections available to you.

## Field

Use this drop-down menu to choose the field you want to generate. The fields displayed are of the **Field Type** you selected.

## Generate [button]

Click to generate code that you can insert into the stationery.

## Generated

This field contains the generated code, which represents the field, default data, program data, or name and URL that you selected. Copy the generated field and paste it into the template in the appropriate location.

**i** **Note:** JavaScript is not allowed in email, and so is not allowed in the stationery. All modern email clients disallow the use of JavaScript within email due to security concerns. If you copy and paste HTML from a web page, be aware that it can contain JavaScript or other tags, such as Flash EMBED and OBJECT tags, that might not render as expected or can cause failure or rejection of the email.

# Stationery Summary

The Stationery Summary page provides instant access to a summary of the state of the stationery. You can preview the properties and content currently defined for the stationery.

## Features:

**Preview** - Click **Preview** to see what your customers see.

**Summary bars** (blue bars) corresponding to the results of each page in the Edit a Stationery wizard page sequence.

- To see more page details, click the (down arrow) button at the right end of each bar to expand the summary display.

To open and edit a page, click **Edit**.

# Test and Seed Lists

Test lists and seed lists are collections of email addresses that are used for the purpose of assuring the quality of outgoing emails. Test lists and seed lists are managed under the **Email** tab of the CRMS menu.

You use a test list to test the appearance and behavior of an email communication or a trigger event response email. The email communication or trigger event response email is sent to the test list, providing copies of the email for testing and QA purposes before it is sent to customers.

**i Note:** Because many personalizations and variations are possible in email communications, the emails sent to a test list do not represent a comprehensive sampling.

A seed list is added to the normal email address lists of an email communication to assure that a specific set of email addresses (example, the addresses of the manager and staff working on the campaign, the associated marketing managers, and the CEO) receives a copy of the email sent.

For email communications sent over multiple days (as in the case where a profile is used as the target), the email is sent to the seed list only on the first day.

## Email Communication: Guidelines

### Reputation is Everything

The main algorithms used by ISPs to identify spam are based on the sender's reputation. Reputation is measured differently by every ISP, but some basic principles hold for all ISPs:

1. The customer complaint rate is the primary input. That is, every time someone clicks the "**This is Spam**" button, your reputation takes a hit. As long as complaints are below 0.1%, your reputation is safe. With anything higher, your reputation starts to suffer.
2. It takes time to gain the ISPs trust. Some senders require time before the ISPs allow their mail to reach the inbox. Live mail from Microsoft currently has the most stringent rules about bulk mailings until they trust you.
3. Spam traps are the second most important input. ISPs use abandoned accounts to

watch for unsolicited email. As a result, you should not email any address that has not had activity in 90-180 days, preferably 90. While this is unfair to legitimate senders (perfectly legitimate addresses can suddenly become spam traps), it is a standard practice in today's email world.

4. Consistent mailings help maintain reputation. Mailings of similar size and with regular frequency can help maintain your reputation. Inconsistency can reduce your overall reputation.
5. Overmailing can hurt your reputation. Mailing too frequently can hurt your reputation. Though there is no "magic number", twice a week does not hurt reputation, but four times a week does.

### **One Bad Message Can Hurt You**

It is crucial that you understand this point. Even a single message sent to an old or suspect list can do lasting and substantial damage to your reputation and your ability to deliver.

We want you to have long and productive relationships with your customers. Maintaining a high level of vigilance regarding email quality greatly improves your short and long term success. If you are in doubt about anything regarding email practices, talk to your client services manager before you send another message.

# Signage

---

This section provides information about signage.

## Topics:

- [About Signage](#)
- [Features and Fields](#)
- [About Creating Signage](#)
- [Embed Tag: Use](#)

## About Signage

Use signage, also known as widgets, to add personalized and dynamically rendered content to a website. For example, depending on the customer who opens your website, you might want to incorporate different offer, club, or tier information in your website.

You can embed widgets in almost any web page. After a widget is inserted, it functions as a modular element in the page, like a spot advertisement, a standard design element, or a regularly occurring feature. You can insert personalized content into these widgets, so that they address and respond to the current customer browsing your web pages.

### Benefits

Web widgets greatly reduce the effort needed to add personalized and dynamic content to a website. Instead of relying on an IT team to build multiple web based applications using APIs, marketers can use Reward's ready-made signage tools and options. Reward's signage features manage the business logic and put control of the payload into the marketers' hands.

## Signage Widgets

Marketers use widgets to work more directly with corporate websites by providing a means of working with site components, page elements and features that serve marketing purpose. The benefits of using Reward widgets rather than custom built applications

become even more compelling over time, as marketers become more familiar with the signage features and as the value of the customer loyalty database becomes clearer.

To implement a widget that communicates data about the customer who is currently browsing the web page, you must link the widget to that customer's records in the Reward customer database. You can accomplish this by supplying the widget with this current customer email address, which serves as the key data.

This key data, the current customer's email address, must be dynamically inserted into the client side Embed Tag for each widget. Different clients pass along this key user data in different ways: using cookies, session variables, and so on. Without exception, IT professionals and senior web designers must be recruited to devise and set up the processes for obtaining and passing this key customer data. This important process is addressed in [Embed Tag: Use](#).

## Features and Fields

Use the Signage page to provide access to all signage records and to help you create and work with signage. The Signage page lists all signage records that have been defined or are in the process of being defined.

To open the Signage page, select **Signage > Signage** from the CRMS menu.

The Signage page includes the following features:

- The **Create > New Signage** option, which starts the Create Signage process.
- The Manage Existing Signage panel which consists of:
  - Standard navigation controls – the **Show** filter and the **1 2 3** page controls.
  - The **Show** filter includes a Type filter, using which you can display records of one of the three main signage types: Offers, Customer Information, and RSS.
  - The complete list of existing signage.

Each row in the list represents a piece of signage and displays a few key fields. These fields are lined up in columns. Click a column heading to sort all of the signage items in the list by that field.

The following fields are displayed:

### **Status**

You can see the current status of piece of signage, and change the status of the communication when appropriate.

### **#**

The unique signage record ID number, automatically assigned by CRMS when the record is created.

### **Signage Name**

The name of the piece of signage as defined by the most recent update. The name is a hyperlink to the signage record, and opens the record in the Edit Signage Details wizard.

### **Type**

The category of signage as selected at the time the record was created.

### **Modified**

The last date on which the signage was changed in any way.

### **Views**

The number of times the signage has loaded on a web page in its lifetime.

### **Clicks**

The number of times a link in a piece of signage has been clicked.

### **Clicks:views %**

The ratio, expressed as a percentage, of total clicks to total views on the piece of signage, analogous to the clickthrough rate on email.

### **Embed Tag**

Clicking this link spawns a pop-up window with the embed tag for this piece of signage.

### **Clone**

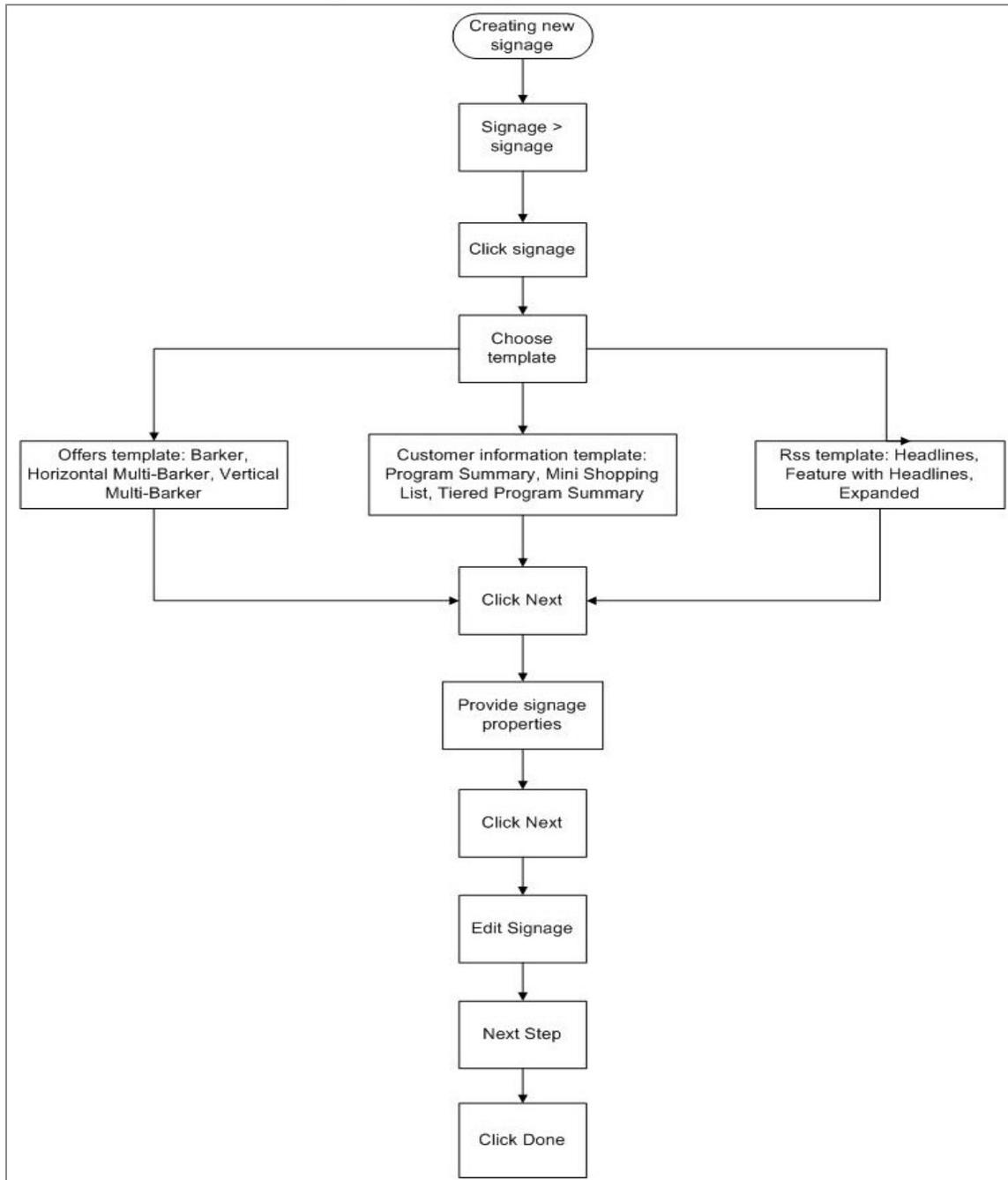
Clicking this link creates a copy of the existing signage as a new record.

## Delete

This link is only available for signage in Saved or Paused Status. To delete a piece of Live signage, you must first pause it by changing its status to Pause. Deleting a piece of signage removes it permanently from CRMS.

Notice that embedding the widget involves modification of the embed tag. You must replace the generic text "Email Address of Customer" with the actual email address of the customer currently viewing the page.\* Your company's IT department and web designer can obtain and insert this data using cookies, session variables, or other methods.

## About Creating Signage



Follow these steps to create a new signage using the **Signage > Create a New Signage** option:

Click **Create > New Signage** link on the Signage page, which creates a new signage record and starts the Edit Signage wizard.

This template selection page is displayed for the first time when you open the Edit Signage wizard to create a piece of signage. This wizard helps you define the new offer by guiding you through the completion of the following pages:

### **Choose Template**

This page is displayed only the first time you open the Edit Signage wizard. After you have selected a signage template, you cannot change templates.

### **Properties**

After you have selected a signage template, the Edit Signage wizard is displayed with either this page or the Summary page.

### **Content**

### **Summary**

You can also create a new piece of signage by cloning an existing signage record. Cloning is especially useful when you want to duplicate most of the attributes of the existing signage.

## **Signage: Developer's Guide**

Using Reward Web Signage, sometimes referred to as web widgets, your company can insert personalized content into your web pages. The customer-facing loyalty program website is the most obvious location for widgets, but you can embed them in almost any web page that follows a customer log-in. After a widget is inserted, it functions as a modular unit, like a spot advertisement, a standard design element, or a regularly occurring feature. Unlike other web elements, widgets can grab attention by displaying the customer's name or other customer-specific data pulled from the Loyalty database.

Widgets are commonly deployed to provide dynamically targeted links to current offers, clubs, and other loyalty program content. Widgets can also be used to record information about the customer.

To see more examples of what signage can do for you, take a quick tour of the signage samples in the Reward Backstage area. This area is made available only to Clients and invited guests, and requires a user name and password. After you have logged in, navigate to the Capabilities section for examples of signage.

## Developing Signage

Marketers can contribute more directly to corporate websites, especially the page elements and features that serve a marketing purpose, by working with signage, also known as widgets. To make widgets available to marketers, however, IT professionals and web designers must help with the set-up.

**i Note:** Marketers must engage their IT staff and website designers in the implementation of Reward signage. Marketers frequently "wade too deep" as they first start to work with signage. Widgets are very useful building blocks, but they must initially be integrated into a website with the cooperation and expertise of your company's IT professionals and web specialists.

After the basic implementation work is done, all parties experience a substantial improvement in efficiencies: IT expertise is no longer required for every update to a widget, marketers get a powerful tool for leveraging their loyalty program data, and web design staff get a personalization tool that improves the quality of the website. The structured work environment of CRMS brings the different talents together into the same loop. The benefits of using Reward widgets rather than custom-built applications become more compelling over time, with the growth of the Reward customer database.

Crucial Signage Requirement: Insert Current Customer Email Address in the Embed Tag

A basic requirement for implementing a personalized widget is the email address of the customer currently browsing the page. This data serves as the key to the customer's information in the Reward customer database. Different Clients pass the ID of the current user in different ways: using cookies, session variables, and so on.

As soon as you know you are using CRMS to develop signage (a widget) for a particular purpose, you should recruit your IT and Web design staff to set up the method for modifying one line in the client side Embed Tag, "isc\_e = <Email Address of Customer>", such that the address of the customer currently browsing the page is inserted into the Embed Tag.

The methods used to insert the current customer data vary greatly from one client to another, so it is impossible for Reward to specify coding that supplies a "one size fits all" solution. However, if your site already includes a secure log-in, or maintains a customer's shopping cart, or captures the customer data required for electronic billing, it already relies on the use of this data, and your IT staff and web design staff have already developed some method for harvesting the customer address.

## Signage: Example

In this screen capture, the section titled "**Exclusively for**" is a widget (a piece of signage) that has been embedded in an ecommerce web page. The name of the loyalty program member viewing the page (Joann Miller, in this example) is dynamically inserted. The offer is selected for Joann based on multiple criteria.



## Embed Tag: Use

An embed tag is a piece of JavaScript code that is used to embed either widgets (pieces of signage) or web beacons (tags) in a web page.

A signage (aka widget) embed tag is a unique piece of JavaScript code that is generated by CRMS "Create a New Signage" feature for each widget (that is, for each piece of signage). It is used to embed a widget in an existing web page, and to capture the email address of the

customer currently browsing the page, and register that this customer has opened that page.

The embed tag is used for tracking customers. A unique embed tag is created within CRMS for each activity that you define. The tag can be embedded in a web page to capture the email address of the customer currently browsing the page, and to register that this customer has opened that page.

Note that both varieties of the embed tag require the email address of the customer browsing the website.

## Notes on Widget Embed Tags

Widgets designed to display more personalized customer information are typically embedded in web pages for loyalty program members.

After the basic content and characteristics of a piece of signage (a widget) is defined in the Create a New Signage process, CRMS generates the basic embed tag code for the widget. The embed tag is made available in the Summary Page of this process.

The CRMS Signage page provides a link to the embed tag for each widget. To see the basic embed tag code, click the embed tag link on any row in the Manage Existing Signage table. A new pop-up window opens, displaying the widget embed tag and its two components.

Each embed tag displays two pieces of code and instructions for inserting both in your web page.

Copy and paste the first piece of code in the location you want this signage to be displayed in your web page. Copy and paste the second piece of code as close as possible to the `</HTML>` tag at the bottom of your web page.

**i Note:** You must replace the text "Email Address Of Customer" in the second piece of widget embed code with the email address of the customer currently browsing the page. This modification to the embed tag, the insertion of the current customer's email address, is the primary subject of this help topic.

## How the Embed Tag is Processed

When your HTML page is browsed by a customer, the following happens:

1. The request to serve the page to a user is sent to your web server first.
2. Your web server renders the email address of the current user into the widget embed tag.
3. Your web server then sends the rendered page to the customer's browser.
4. When the widget embed tag (now including a rendered, real email address) is loaded into the browser, it uses JavaScript to send the rendered email address to our database.
5. Our database looks up the customer, based on their email address, and then sends back the customer's properties (first name, last name, point balance, and so on) to the widget.
6. The widget then displays whatever properties you have chosen in your widget design. This can be the customer's first name, or an accounting of the users loyalty program point earning, balance, and point expenditures.

### **How Do I Get the Address of the Current Customer?**

Almost all commerce websites today maintain and display personalized information for their users. This is accomplished in a variety of ways, but most often by using cookies and session variables. When a customer logs in, the web server for the site often stores information about that user (including the user's email address) into a cookie. Some sites that maintain more strict security store an encrypted ID for the customer in the cookie, then use that ID to look up the email address of the customer in a protected database at run time. In one way or another, almost all pages of a modern commerce web site have the ability to retrieve the customer's email address.

Users might not even need to be "logged in" to be recognized; instead, they might be "passively recognized". Amazon.com serves as a good example of this approach: if Jane Q. Doe logs in once, closes her browser, then reopens it later (even weeks later), she is greeted with the message "Hello, Jane Doe!". After receiving this personalized greeting, if you try to do anything that requires a higher level of security, like editing personal information, you are asked to login formally.

## **Server-Side Tags**

So how does a web page retrieve and display the email address of a customer? Most often, by using server side tags. Consider this line of HTML:

```
<b>Hello, Valued Customer</b>
```

This displays in a web browser, for everyone, as Hello, Valued Customer; not a bad message, but not very personalized. We can replace the "Valued Customer" text with a server side tag, like this:

```
<b>Hello, <%=Session['currentCustomerEmailAddress']%></b>
```

Server side tags are just like using mail merge tags in Microsoft Word or any other word processing program. When your web page is requested by a customer, your web server first reads through the entire page's HTML and replaces all server side tags with the data they are requesting. Only then, does it send the rendered page along to the customer's browser. The exact syntax and method of how the email address is retrieved depends entirely on how your web site is built. For instance, the example just cited only works in a site that is running Asp.Net and happens to use a session variable called "currentCustomerEmailAddress".

### **Let Your IT Professionals Do It**

If your site already has some personalization, getting the customer's email address into the embed tag is going to be relatively easy. However, it is a job for the pros: your IT department and website specialists know exactly how to retrieve the current customer's email address and place the requisite server side tag into your signage embed tag.

Other modifications to the embed tag code are treated as optional here; however, they might not seem optional to your company's web designers. Be sure to enlist the services of the web page designer responsible for the page in which any signage widget is embedded. This designer can set up the widget so that it reflects your corporate design standards and so that the widget and web page respond to any unrecognized email addresses in a graceful manner.

# Content

---

This section provides information about content items.

## Topics:

- [Content Items & Rule Sets](#)
- [Content Items](#)
- [Content Rule Sets](#)

## Content Items and Rule Sets

Used in concert with CRMS email communication features, you can add "dynamic content" to your email communications by using content items and content rules sets features.

Dynamic content helps you create emails that deliver more specific, smartly-tailored messages to recipients, messages that are more likely to generate increased sales.

Email marketers use dynamic content technology to solve challenges such as the following:

- Customize updates by state, province or other geographical characteristics.
- Substitute different paragraphs of text or graphics in an email by applying rules based on demographics or other targeting data.
- Create cross-sell offers based on previous purchases.
- Alert customers to replenish consumable products that must be replaced regularly, or to schedule recurring services that must be performed at specific intervals, such as oil changes and tune-ups).

Using dynamic content features, your company can define pieces of content to be added to email communications, and also sets of business rules that selectively add these content items into different customer emails. You can define the pieces of content by using the **Content Items** options. You can define the selection rules by using the content rule sets options.

Adding a content rule set to an email communication causes specific pieces of content (content items) to be added to the individually addressed emails. When the individual

emails are generated, the email system automatically applies matching rules to select the content. You can use content rule sets to display content items based on whether an email recipient is a member of the profiles and/or lists specified in the rule set.

Content items are chunks of email content. They can include rich content (HTML) or text-only content. You can add a content item directly to an email communication, by selecting it from a drop-down selection box in the Edit Email Communication wizard, or you can add a content item indirectly, through the use of content rule sets and their logic.

To add a content item directly to an email, you can use the Edit Email Communication wizard. (Adding a content item directly to an email is convenient, but it is not a proper example of dynamic content.)

To make a content item available for insertion into an email communication by means of a content rule set, you must associate the content item with a content rule set. Then, if the email communication is sent to a customer identified in the rule set, CRMS inserts the content item into that email.

### **How do you add a Content Rule Set to an email communication?**

To define content items, select **Content > Content Items**. To define a content rule set, select **Content > Content Rule Sets**.

When you are constructing an email communication, you can insert a content rule set into the email message, just as you would insert any other type of predefined content. Using the Edit Email Communication wizard, you insert a reference tag for the content rule set into the email. If a matching condition in the rule set is triggered, then the content item identified by that matching rule is inserted into the email. The content is inserted at the location where you placed the content rule set reference tag.

### **How is an email communication that uses dynamic content different than other emails?**

Email that does not use the full range of dynamic content features define one email communication for one list of recipients (that is, for the entire mailing list). Such email can include one level of personalization, which is very powerful. However, without the extra level of targeting afforded by dynamic content, this single level of personalization is limited to displaying the contents of specific data fields, including the following :

- Customer-related data values from fields that are already in the database
- Email address data that you have already specified (e.g., from name, from address, subject line)
- The existing loyalty-related URLs

- The loyalty-program data, such as the tier or club data you have defined in previous CRMS sessions.

**i Note:** A content item can include the same basic personalization data that is allowed in an email.

As powerful as these personalizations are, they add the same basic set of rich content or text, and the same set of reference tags, to each email. If you lack content rule sets, you cannot insert different types of content for different recipients, nor can you insert different images and messages that are targeted at specific lists and customer profiles. Customer-targeted images, and informational contexts cannot be switched in and out to appeal to different targets.

Using content rule set features, you can insert variable content (different CRMS content items) where and how you want, based on the customer targets you choose. You can identify swappable content items (such as different images, URLs or paragraphs) and insert them in an email, based on different targeting parameters (including lists).

Using multiple content rule sets you can customize a single email to include appeals to several different customer attributes. That is, you can insert different pieces of rule-selected content in multiple locations in an email. Each inserted element can be based on a different segmentation criteria, so one email communication can effectively target multiple customer traits. The power is equivalent to using multiple variables.

Instead of creating a separate email communication for each segment in a emailing list, the content features let you compose an email that is made up of various targeted content items, depending on the rules you define to control the insertion of content items. Each content item can include its own personalization items, of course.

### General Procedures

To add a content item directly to an email, you simply use the Edit Email Communication wizard. Depending on the type of content you are adding, you use either the Rich Content or Text-Only Content page of the wizard. With the **Field Type** set to **Content Item**, you can see and select from all of the content items that are currently defined.

To make a content item available for insertion into an email communication by means of a content rule set, you must specify the rules for using the content item in a content rule set. You do this by associating the content item with a profile or list identified in the rule set. Then, if the email communication is sent to a customer identified in the rule set, CRMS inserts the corresponding content item into that email in an intelligent way.

# Dynamic Content

Reward's **CRMS Content** tab provides wizards to help you create and edit content items and content rule sets. To put content items and content rule sets into an email, you can use the **Email** tab's **Communication** features, especially the Edit Email Communication wizard.

## To Work with a Content Item

To create a content item, select **Content > Create New Content Item**. For help, see "Create a New Content Item".

To edit an existing content item, select **Content > Content Item** to open the Content Item page. Click the name of the content item you want to change. This opens the Edit a Content Item wizard, which guides you through the steps of defining or redefining a content item by completing a sequence of pages. You can also navigate freely to a specific page to see or change data.

After completing each page, click the **Next Step** button to advance to the next page until the content item is finished. If you have no rich text, skip the Text-Only Content page by clicking **Done**.

## To Work with a Content Rule Set

To create a content rule set, select **Content > Create New Content Rule Set**. For help, see "Create a New Content Rule Set".

To edit an existing content rule set, select **Content > Content Rule Set**. Click the name of the content rule set you want to change. This opens the Edit a Content Rule Set wizard, which guides you through the steps of defining a content rule set by completing a sequence of pages. You can also navigate freely to a specific page to see or change data.

After completing each page, simply click the **Next Step** button to advance to the next page until the content item is finished. If you have no rich text, skip the Text-Only Content page by clicking **Done**.

## To Work with an Email Communication

1. To add a content rule set to an email communication, select **Email > Communications**, and then click the email whose content you want to modify from the list of existing email communications. The Edit Email Communication wizard is displayed, displaying properties information for that email communication. Add or edit information on this page as necessary.

2. Navigate to the Edit Rich content page or the Edit Text-only page of the wizard, depending on the type of content you need to add. In the **Field Type** drop-down menu, select **Content Rule Sets** and **Select**. The Select a Content Set window is displayed.
3. Select a content rule set. The tag for the selected content rule set should be displayed in the text box following the word "Generated:".
4. Copy the tag (using the **Edit > Copy** menu option from your window frame, or Ctrl+C) and paste it into the email where you want the content item to be displayed.
5. Click **Save** inside the CRMS page.
6. For each content rule set you want to insert, repeat steps 3 through 6.
7. Click **Done** to save your work and exit the Edit Email Communication wizard.

### **Dynamic Content Planning Tips:**

Rather than segmenting your lists and then spending days creating, managing, and sending numerous variations of your email to the appropriate segments, you can use dynamic content features to create a single, smarter email communication. As a general rule, the more population segments you target, and the more specific the variations of your message, the more compelling dynamic content becomes. However, if you do not have content that makes sense for each segment, or you do not have a list that can be segmented on specific data, dynamic content might not be the best choice for your circumstances.

Effective use of dynamic content requires planning. Before using dynamic content, do the following to build an email:

- Assess the feasibility of your initial concept. If solid content is available and you can readily implement content rule set logic that accurately targets the same segment as the content, you have a good candidate.
- Develop a plan, including a spreadsheet or equivalent, that identifies all required elements, from swappable content items to test lists.
- You must define rules and content that match. For example, to deliver the "Top Ten list for Demographic A" as content to a recipient if she is a Demographic A customer, you must create a rule to select Demographic A customers and then assign the "Top Ten list for Demographic A" content to that rule.
- Before sending your dynamic content messages, preview and test all versions to ensure that each audience segment receives messages that are properly rendered and that it makes sense in all possible contexts. Test the various elements and

combinations by sending to the email to a test list that exercises all results of the content rule sets used in the email.

### **Deleting Content Items or Content Rule Sets after Reference Tags are in Emails: Use of Defaults**

In general, when a content item or content rule set is deleted, or for some other reason is not inserted into an email, nothing is added to the rendered version of the email that is sent out: no spaces, no line breaks or line spaces or new paragraphs.

#### **Note the following applications of this rule:**

- If you include in an email a rule set that has no matching conditions but the default, every email that is sent includes the default.
- If you include in an email a content item tag that is subsequently deleted, the item renders as blank. That is, the email is rendered exactly as if no item has ever been added: nothing is added. The same is true for a content rule set that is deleted after the rule set tag has been added to an email. Nothing is displayed in the email to replace the omitted content.
- If you include in an email a content rule set whose matching conditions have been deleted, the default content is supplied. If the default is blank, the email is rendered exactly as if no content rule been added. Nothing is added.

## **Content Items**

### **Content Item: Content**

Content item can contain virtually all of the types of information that an email can contain. The only exception is that a content item cannot contain other content items or content rule sets. A logical loop that could not be processed might be created.

A content item is, in most respects, simply a chunk of an email communication that has been defined as a reusable email component and that has been assigned its own reference tag.

## What Types of Rich Content Go into a Content Item?

You can use the Rich Content page of the Content Item wizard to create a set of rich content HTML code (including links) that you can use as a preassembled component when you are constructing an email communication. If you intend to insert a content item into an email by applying a content rules set, the content item should be suitable for use as an interchangeable component that can be replaced by alternative content items. The selection of the content item to be inserted depends on the targeting rules set up in the content rules set.

When you are defining the contents of a content item, you can use the Rich Content page to specify the dynamic fields and specific elements you want to add to an email, and package them in the form of a content item.

### Details

At the most detailed level of processing, the Rich Content page provides assistance by helping you select or generate the reference tag for a dynamic field or element that you want to include. (These tags are sometimes also called "personalization tags" because they refer to data that personalizes the email.) You can then insert the reference tag into your content item in the appropriate location. As Reward generates each personalized email in an email communication, it renders these reference tags into personalized data by extracting the referenced data from its extensive database. At this level of processing, specific types of data about your customers and your loyalty program are specified by the reference tags.

For example, you can personalize an email by inserting into a content item fields that display the customer's first name, point balance, last award or award date; or by inserting elements of one of the offers that you selected in the Clubs and Offers page of the Email Communications wizard, including an image; or by inserting a URL that links the customer to a questionnaire or to a Refer a Friend site. Assuming you have set up the appropriate options in your email communication to support these elements, the detailed data you specify in a content item can be quite powerful.

If your company has defined custom attributes, you can insert reference tags that pull customer specific values from these custom attributes.



**Note:** The reference tags for custom attributes are not standard items, and cannot be listed with other reference tags and dynamic fields.

## What Happens to a Content Item?

After you complete your definition of a content item, that content item itself is assigned a type of reference tag, and you can manage it almost like a reference tag for a dynamic field. That is, you can select it and insert it in an email as if it were an object. Note, however, that the reference tags for content items can also be managed on a higher level when you use a content rule set.

If a content item is added to an email, the appropriate data for each recipient is extracted from the database and inserted into that email message. Ultimately, the email displays information selected for the recipient.

In summary, if you want to customize the rich content in a content item, the Rich Content page provides the basic code generation tools, code display, and text editing environment that you need.

## Content Item: Properties

The Content Item Properties page records the content item name and other crucial information used to reference and identify the content item. This information is for other CRMS users and for CRMS: it is not displayed to users. Defining and saving the content item description is the first step in creating a new content item or editing an existing content item.

The Properties page is displayed when you create a new content item, clone a content item, or open an existing content item record for editing.

### Fields

You can use the Properties page to describe a content item by recording data in the following fields:

#### **Name**

It is the content item name that is displayed in the main Content Item page.

#### **Reference Tag**

It is the unique identifier for this content item that is displayed in content rule sets or emails. This is the text that forms the unique part of a hyperlink to this content. Content item reference tags can only use standard alphanumeric characters and the underscore character: "\_". If you supply no reference tag text, CRMS-assigned ID number is used instead, by default. Modifying the content item reference tag for a content item causes existing links to fail. The content is no longer rendered in any emails that include the

old tag. This action has no effect within a content rule set, since content rule sets do not use the reference tag.

### Source ID

You can use this optional field to define an alternate name or ID for this content item. This is most often used if you have exported content items from another content management system and want to retain a cross reference to the item's old ID. This field is not used in any way by the Reward system.

### Internal Note

This text is used internally in CRMS, and is displayed only on this page. The best practice is to use this space to record useful information about this content. Such information might include its intended purpose, a content summary, how it has been modified (if appropriate), non-obvious characteristics with potential impact, and so on.

**i** **Note:** After finishing work on this page, click the **Next Step** button. This saves your work and advances the wizard to the next page in the workflow.

To define the properties of a content item:

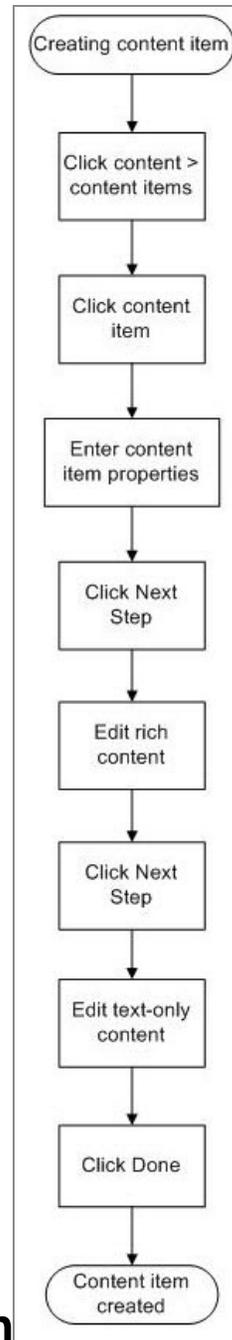
1. Start the Edit Content Item wizard.

When you create a new content item record or edit an existing content item record, the Edit Content Item wizard starts automatically, and the Properties page is displayed first. A new content item record contains no data except for a unique content item ID number, which is automatically assigned by CRMS and cannot be changed.

2. Supply the content item data field values.
3. Click **Next Step**.

The Edit Rich Content page is displayed.

**i** **Note:** When you modify an existing content item record, add text to update the notes in the **Internal Note** field in the Properties page. Always review all preexisting data. Remove unwanted data and add the correct new data.



## Creating a New Content Item

A content item is a collection of rich content or text-only content that is designed to be inserted into an email communication, either directly, or according to the logic defined in a control rule set.

### Procedure

1. Select **Content > Create New Content Item**.

This opens the Edit a Content Item wizard, which guides you through the steps of defining a content item by completing a sequence of pages.

## Editing an Existing Content Item

### Procedure

1. Select **Content > Content Item** to open the Content Item page.
2. Click the name of the content item you want to change.

This opens the Edit a Content Item wizard, which displays the first page of data for the existing content item. The wizard provides access to each page of data that defines the current content item.

The Edit a Content item wizard guides you through the completion of the following pages:

- Content Item Properties
- Content Item Rich Content
- Content Item Text-only Content

After completing each page, simply click **Next Step** to advance to the next page until the content item is finished. If you have no rich text, skip the Text-Only Content page by clicking **Done**.

## Editing Content Item

### Procedure

1. Select **Content > Content Items** to open the Content Item page.
2. Click the name of the content item you want to change.

The Edit a Content Item wizard is displayed, which provides access to each page of data that defines the current content item.

3. In the Properties page, modify any of the fields: **Name**, **Reference Tag**, **Source ID**, and/or **Internal Note**.
4. Click **Next Step**, which takes you to the Edit Rich Content page.

You can use this page to see and edit the HTML code for the selected email template.

5. Select the **Field Type** and **Field** you like to include, then click **Generate**.

The generated content is displayed in the **Generated** field.

6. Copy this generated text and insert it anywhere in your content.

At run time, this tag is replaced by the first name of the customer receiving the communication.

7. Click **Next Step**, which takes you to the Text-only Content page.

You can use this page to see and edit the text only version of your email template.

8. Click **Save** or **Done**.

## Content Item: Rich Content

You can use the Rich Content page to create content and to see and edit HTML content associated with the currently selected content item. It also provides a preview of the currently saved rich content. If included in any given email communication, this content item information is rendered according to the standards associated with that email.

**i Note:** A content item can contain all types of information that an email can contain. The only exception is that a content item cannot contain other content items or content rule sets. A content item is, in most respects, simply a chunk of an email communication that has been defined as a reusable email component and assigned its own reference tag.

### The Rich Content of a Content Item

You can use the Rich Content page to create a set of rich content HTML code (including links) that you can use as a preassembled component when you are constructing an email communication. If you intend to insert a content item into an email by applying a content rules set, the content item should be suitable for use as an interchangeable component that can be replaced by alternative content items. The selection of the content item to be inserted depends on the targeting rules set up in the content rule set.

### Fields and Features

## Preview

Click this button to see a preview of the displayed code for this content item, as it is currently displayed in this Rich Content page. This is displayed in the Preview dialog box.

### Current Personalization and Default Personalization

In the Preview dialog box, you can click **Current Personalization** to get a slightly better sense of how the text is displayed when an individual customer is associated with the email. Similarly, you can click **Default Personalization** to get a sense of how the text is displayed when no individual customer is associated with the email and the default values are displayed.

## Field Type

Use this drop-down selector to choose the type of field code you want to generate. By first selecting the type of field you want to use, you can narrow down the list of fields from which you can select. Your selection of **Field Type** can also change the other field selections you must use, as follows:

- If you choose General, a **Default** data entry field is displayed in addition to the **Field** drop-down selector. See the entry on the **Default** field.
- If you choose Offers, another (untitled) drop-down selection box is displayed after **Field**. From this selection, choose each piece of offer data to be generated; for example, the offer headline, description, qualification End date or expiration date.
- If you choose Main Program, another (untitled) drop-down selection box is displayed after **Field**. From this selection, choose a piece of fundamental main program data to be generated.
- If you choose Trackable URL, it is followed by a text entry box labeled "**Name**", which is followed by another labeled "**URL**". You can use the **Name** field to enter a short name that you want to substitute for the URL that you copy into the **URL** field. The name that you enter is displayed on any reports and displays that show trackable URL data. You must supply the URL text and make sure that it is correct. Although CRMS can determine whether the URL satisfies the basic requirements for a URL string, it cannot validate that an apparently legal string actually refers to the URL you meant to track.

## Field

Use this drop-down selector to choose the field you want to generate. The fields displayed are of the **Field Type** you selected.

For example, if you set **Field Type** to URLs, the **Field** drop-down selector list displays reference tags that refer to the defined list of loyalty program URLs, and you might see a listing that includes Signup, My Account, and Refer a Friend.

**i Note:** If you have created a custom attribute field that records some unique piece of data about your customers, you can personalize your emails for each customer by adding this unique attribute to each email. Although custom attribute fields that you define in CRMS are not listed in the standard drop-down selection boxes, they can be added to an email communication.

### Default

Use this field to specify the default text to be inserted in the email if a customer specific field cannot be populated. For example, if the customer's name cannot be provided in an opening address, you might substitute a generic term, so that the opening reads, "Dear Valued Customer," or something no worse.

### Generate

Click this button to generate a reference tag that you can insert into the email template.

### Generated

This field contains the generated reference tag, which represents the field, default data, program data, or name and URL that you selected. Copy the generated field and paste it into the template in the appropriate location.

**i Note:** JavaScript is not allowed in email. All modern email clients disallow the use of JavaScript within email due to security concerns. If you copy and paste HTML from a web page, be aware that it might contain JavaScript or other tags, such as Flash EMBED and OBJECT tags, that might not render as expected or can cause failure or rejection of the email.

**i Note:** Few email clients correctly support CSS in email. It is a good practice to perform formatting with inline style definitions, not classes.

## Content Item: Text-Only

You can use the Text-Only Content page to see and edit the text only version of your content item. You can also add several different types of client and customer specific elements to the content item.

**i Note:** Before using the Text-Only Content page, you might want to click the **Update from HTML** button to bring in text from the HTML (Rich Content) version. This option strips out all of the HTML formatting and includes just the text from your rich content version. Note, however, that text imported in this way can include or omit material in unexpected ways. Such text should be used only as rough draft material; that is, you should review it and revise it to assure that it is of suitable quality.

You can use the Text-Only Content page to specify the dynamic fields and elements you want to add to an email by means of the content item, and then generates the code for these -- as appropriate for email rendered in text-only format. You can then insert the code for each dynamic field.

Email uses dynamic fields to extract data from the extensive database of information maintained for your company by Reward. The appropriate data is extracted and inserted into the email message for each customer, where it displays text information selected for that customer.

For example, you can insert such elements as a field displaying the customer's first name, point balance, last award or award date; or text associated with one of the offers that you selected in the Clubs and Offers page of the Email Communications wizard; or a URL that links this customer to a questionnaire or to a Refer a Friend site (assuming you have set up the options to support these elements). You cannot insert images or formatted text.

**i Note:** Custom attribute fields that your company has defined can be inserted into an email, but they are optional. The standard Email Communication wizard does not display these fields or supply you with the reference tags.

### Fields and Features

#### Preview

Click this button to see a rendering of all of the content items selected as possible candidates for this email. You can change a setting to see either the rich content or the

text-only version. This rendering is displayed in the Preview dialog. Be aware that, without a link to an individual email recipient, it is impossible to address much of the detailed content, and few data values might be displayed.

**i** **Note:** In the Email Preview dialog, you can click **Current Personalization** to get a slightly better sense of how the text is displayed when an individual customer is associated with the email. Similarly, you can click **Default Personalization** to get a better sense of how the text is displayed when no individual customer is associated with the email and the default values are displayed.

### Update from HTML

Click this button to strip the text out of the existing Rich Content page and paste it into the text-only version. This does not necessarily yield a perfect text-only version, so you must review the results carefully and edit the Text-Only Content page to suit your purpose. However, the convenience of using this option to parse out and copy a large quantity of text usually results in a significant saving of time.

### Field Type

Use this dropdown selector to choose the type of field code you want to generate. This narrows down the list of fields from which you can select, to a reasonable number. Your selection of **Field Type** can also change the other field selections you must use, as follows:

- If you choose General, a **Default** data entry field is displayed after the **Field** drop-down. Use this **Default** data entry field to supply the default text. The default text is used if specific field data (a value) is not available for a customer.
- If you choose Main Program, another (untitled) drop-down selection box is displayed after **Field**. From this selection, choose a piece of fundamental main program data to be generated.
- If you choose Offers, another (untitled) drop-down selection box is displayed after **Field**. From this selection, choose each piece of offer data to be generated; for example, the offer headline, description, qualification End date or expiration date.
- If you choose Email, another (untitled) drop-down selection box is displayed after **Field**. From this selection, choose each piece of offer data to be generated; for example, the offer headline, description, qualification End date or expiration date.
- If you choose Trackable URL, it is followed by a text entry box labeled "**Name**",

which is followed by another label "**URL**". You use the **Name** field to enter a short name that you want to substitute for the URL that you copy into the **URL** field. The name that you enter is displayed on any reports and displays that show **Trackable URL** data. You must supply the URL text and make sure that it is correct. Although CRMS can determine whether the URL satisfies the basic requirements for a URL string, it cannot validate that an apparently legal string actually refers to the URL you meant to track.

### Field

Use this drop-down selector to choose the field you want to generate and add to the email. The fields displayed are of the **Field Type** you selected.

### Generate

Click this button to generate personalization tags that you can insert into the email template.

### Generated

This field contains the generated reference tag, which represents the field, default data, program data, or URL that you selected. Copy the generated field and paste it into the template in the appropriate location, that is, where you want the text to be displayed in the email.

## Deleting Content Item

Deleting a record permanently deletes the record. The item is removed from all content rule sets that use it, and from all lists that offer it as a selectable option. References to this content item are not automatically removed from emails. However, all emails that include references to this content item omit the content. Nothing, not even a character space, replaces the omitted content.

### Procedure

1. Find the record you want to delete in the Content Items table in the Content Items page.

Use the search and sort options to narrow your choices and put the remaining filtered records in order. Each row in the page represents a record. Column headings identify the key record fields displayed in this list. Click a column heading to sort all

of the offers in the listing by that field. Use the standard navigation controls, as necessary. Identify the row for the record you want to duplicate.

2. Click the **Delete** link in the same row.

A warning message is displayed, advising you of the effects of deleting. Click **OK** to continue.

3. The content item record is deleted and the list in the Content Items page is displayed again, with the deleted content item omitted.

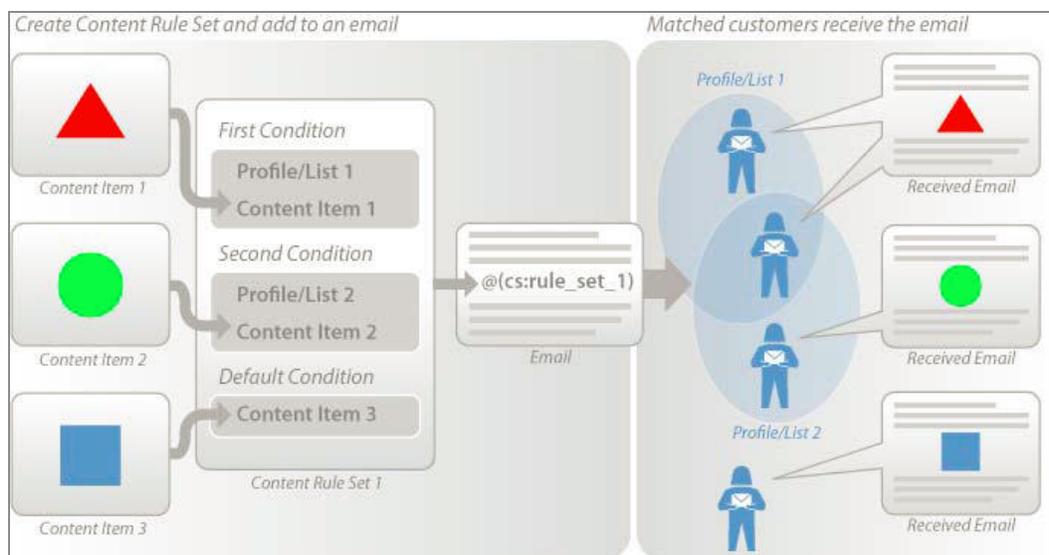
**i Note:**

If a content item in use is deleted (that is, if the content item is deleted while its reference tag is still included in some email), the following occurs:

- In a content rule set: the content item is removed from the content rule set, and the rule set continues to function as normal.
- In an email: the content item reference tag remains in the email, but renders to nothing, effectively being erased in the final, sent email. Not even a space is displayed in the rendered email where the tag is placed. Note that if a new content item is created that uses the same reference tag as a previously deleted content item, all emails including that same tag render the new content item. Delete content items with care.

## Content Rule Sets

This diagram shows how content rule sets apply logical match conditions to select and add different content items to emails targeted to different users.



## Content Rule Set: Match Conditions

You can use the Match Conditions page to define a content rule set: a set of logical matching rules used to selectively insert a predefined content item into an email communication message.

When you are creating the message for an email communication, you can insert the reference tag for a content rule set in the same way you insert any other reference tag.

When CRMS processes an email communication that includes a given content rule set, it applies that content rule set to determine which content item to insert into the email for each recipient.

The Match Conditions page opens after you complete the definition of the Content Rule Set Properties page, or when you navigate directly to it in the Content Rule Set wizard.

### Fields and Features

You can use the Match Conditions page to describe a content rule set by using the following controls and fields:

#### Add New Match Condition button

Click this button to add another rule (also called a **"Match Condition"**) to the existing rule set. A new **Match Condition** box is added to the bottom of your current collection, just before the last (**Default**) box, which is reserved for remaining customers who do not

match any defined match condition.

You can reposition the new match condition by using the "**Move Up**" and "**Move Down**" links.

### **Profile & List controls:**

#### **Add Profiles & Lists button**

Click this button to add profiles and/or lists to the **Match Condition** you are defining. The Select Profiles and Lists window opens, and you can select from displays of all existing profiles and lists. When you click the **Add Checked** button, the selected items are added to the condition.

The order in which profiles and lists are listed within a condition does not matter. If an email recipient is a member of any of the profiles or lists attached to the condition, there is a match to that condition.

#### **Remove (Profile or List)**

If a profile or list is currently associated with the match condition and is displayed in the list box to the right of the **Add Profiles & Lists** button, a control labeled "**Remove**" is displayed in the same row, at the right edge of the box.

To delete the associated profile or list and end its association with the match condition you are currently defining, click this **Remove** link.

#### **Remove All (Profiles and Lists) button**

To disassociate all profiles and lists from a match condition and remove their names from the list for the match condition, click the **Remove All** button.

#### **Move Up/Move Down**

To change the order in which a match condition is processed relative to other match conditions in the same content rule set, use the **Move Up** and **Move Down** controls.

#### **Delete**

To delete and permanently remove a match condition from the current content rule set, click the **Delete** link in the upper right corner of the Match Condition box.

This warning notice is displayed: "This action will remove this condition. Do you want to continue?"

Click **OK** to complete the removal of the entire match condition.

Be aware that if all match conditions are deleted, only the default content is provided. If that content is blank, absolutely nothing is added.

**Controlling the evaluation order of match conditions.** Match conditions are displayed in the order in which they are evaluated, from top to bottom. If a given email recipient is a member of a profile or list associated with the first condition, that recipient is shown the content item associated with that condition. (That is, the associated content item is added to the email for this matching recipient.) If the recipient is not a member of the profiles and lists in the match condition, that recipient is evaluated against the next match condition in turn. If a recipient fails to match any condition, the content defined in the default condition, at the very bottom of the list, is added to the email.

A recipient can match more than one condition. In that case, the content associated with the first successful match to a condition, and no other, is inserted into that recipient's email. You can adjust the order in which any one condition is evaluated with respect to others by clicking its "**Move Down**" and "**Move Up**" links. You can also change the processing of a condition by deleting it, naturally.

#### **Content Item controls:**

##### **Choose Content button**

Click this button to select the content Item to be associated with the match condition you are currently defining. The Select a Content Item window opens in which you can select items from a display of all existing content items.

 **Note:** It is perfectly OK not to select a content item for a condition. In that case, nothing is rendered at the location of the content rule set reference tag in your email. The absence of content can be part of your design, so the lack of content is not considered an error.

##### **Remove (Content Item)**

If a content item is currently associated with the match condition, a control labeled "**Remove**" is displayed after the title of the content Item.

Click **Remove** to remove the associated content item and end its association with the match condition you are currently defining. This warning notice is displayed: "This action will remove the current content item in this condition. Do you want to continue?"

Click **OK** to complete the removal of the content item.

### Preview (Content Item)

If a content item is currently associated with the match condition, a **Preview** link is displayed after the title of the content item.

Click this link to see a preview of the content item currently associated with the match condition.

## Match Condition: Define

Before you define a content rule set, ensure the following:

- That you have created the content items and the profiles and/or lists you are going to use with each match condition.
- That your content item and your selection of profiles or lists for each match condition address the same target.
- That you have a default content item, one that can be inserted into the emails to recipients who do not match any of your defined conditions.

**i Note:** If you specify to omit a content item for a given match condition, nothing is added when there is a match to that condition. Intentional omissions are a legitimate tactic, and it is perfectly acceptable for your plan to specify the omission of a content item. However, while the technology fully supports the tactic, almost all instructions assume that a content item is supplied for each match condition. This is to prevent accidental omissions.

Your plan helps you keep track of the lists and profiles that should be associated with each content item, so that the components of content rule set are easy to assemble and check.

If you are defining a new content rule set, the two standard approaches are the following:

- Start by defining the first match condition that should be processed, and then proceed to the other match conditions in the order.
- Define the last, default content item first, and then return to the top of the list to work on the first match condition and proceed to the others.

If you need to leave a content rule set incomplete for more than a short time, the best practice is to leave notes about any partially defined match conditions, in addition to your plans for the content rule set as a whole.

## Defining Match Condition

The following instructions assume that you are defining a new set of matching conditions for your content rule set. If some match conditions have already been defined, click **Add New Match Conditions**.

### Procedure

1. In the first match condition, click **Add Profiles and Lists** to open the Select Profiles and Lists window.
2. Add all of the profiles and lists that are part of the match condition.
  - In the Select Profiles and Lists window, click **Profiles** tab.
  - Select all profiles that should be added to the match condition you are currently defining. Each profile should be checkmarked.
  - Click **Add Checked** to add the selected profiles.
  - In the Select Profiles and Lists window, click **Lists** tab.
  - Select all lists that should be added to the match condition you are currently defining. Each list should be checkmarked.
  - Click **Add Checked** to add the selected lists.
  - Click **Done** in the Select Profiles and Lists window to close it.

The Select Profiles and Lists window closes and the correct items are displayed in the list for the match condition.

3. Double check the items displayed in the match condition to verify that the correct profiles and lists have been added to the condition. Correct the list, as necessary:
  - If required profiles or lists are not displayed in the condition list, repeat steps 1 through 2 to add them.
  - To delete an associated profile or list and end its association with the match condition, click the **Remove** link associated with it, on the same row to the right.
  - To disassociate all profiles and lists from a match condition and remove their names from the list for the match condition, click **Remove All** to the left of the list.
4. Choose the content item to be associated with this match condition.

- Click **Choose Content**.
- The Select a Content Item window opens, displaying all existing content items.
- To find a content item, enter part of its name in the text entry box at the top of the window and click **Go**. Content items with matching text strings are displayed.
- To preview a content item, click the **Preview** link associated with it, on the same row to the right.

Note that, because the preview window lacks a specific associated customer name to use as an index, most personalization fields are not rendered in the preview.

- Click **Select** link next to the content item. The Select a Content Item window closes, and the selected item is associated with the match condition.
5. Click **Save** to save your work.
  6. If you need to add another match condition to your content rule set, click **Add New Match Condition**. A new Match Condition box is displayed at the end of your currently defined conditions, and just before the last default rule.
  7. To define another match condition, repeat steps 1 through 6.
  8. Use the **Move Up** and **Move Down** controls to change the order in which your match conditions are processed.
  9. Click **Done**.

**i Note:** The definition of a content rule set is not complete until testing is complete. Your test list for an email with content rule sets should exercise every variation of all the different content items that your content rule set can insert.

## Content Rule Set: Properties

The Content Rule Set Properties page records the name and other crucial information used to reference and identify the content rule set. This information is for other CRMS users and for CRMS: it is not displayed to users. Defining and saving the content rule set description is the first step in creating a new content rule set or editing an existing content rule set.

The Properties page is displayed when you create a new content rule set, clone a content rule set, or open an existing content rule set record for editing.

## Fields

Use the Properties page to describe a content rule set by recording data in the following fields:

### Name

It is the content rule set name that is listed in the table in the main Content Rule Set page. (Maximum characters: 45.)

### Reference Tag

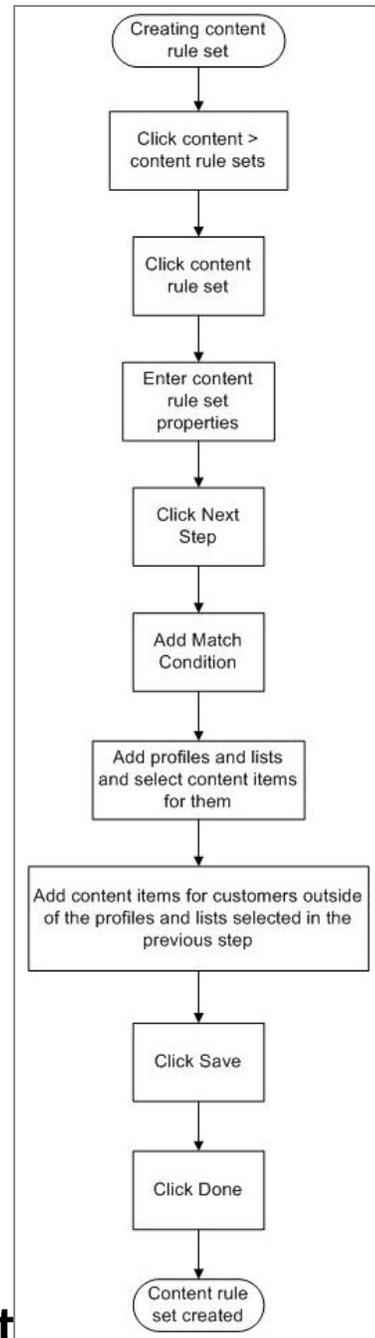
It is the unique identifier for this content rule set that is displayed in emails. This is the text that forms the unique part of a reference tag to this content rule set. Content rule set reference tags can only use standard alphanumeric characters and the underscore character: "\_"; no spaces are allowed. If you supply no reference tag text, CRMS assigned ID number is used instead, by default. Modifying the content rule set reference tag causes the existing links to fail: rules are not applied and content is no longer rendered in any emails that include the old tag. (Maximum characters: 30.)

### Internal Note

It is the text used internally in CRMS, and is only displayed on this page. The best practice is to use this space to record useful summary information about this content rule set. Such information can include its intended purpose, a content summary, how it has been modified (if appropriate), caveats, and so on.



**Note:** After completing work on this page, click **Next Step**. This saves your work and advances the wizard to the next page in the workflow.



## About Creating Content Rule Set

Create a content rule set to add dynamically selected content to an email communication.

A content rule set establishes a set of matching rules using which you can add specific pieces of content to the individual emails in an email communication. The selection of content that is added to each individual email depends on whether that email's address matches a customer specified in one of the matching rules in the rule set.

### How is a Content Rule Set used?

When you are using the Edit a Content Item wizard to construct an email communication, you can insert a reference tag corresponding to the content rule set into the email message. You paste the reference tag exactly where you want the results of the content rule set to be displayed.

When the process of generating the email communication commences, the individual emails are populated in two stages:

First, if a matching rule in the rule set is triggered, the content item identified by that matching rule is inserted into the email at the location where you placed the reference tag. Then, if the embedded content item contains any reference tags that are supposed to pull data from the database or from URLs, the next stage replaces these tags with the appropriate database values, or else with the default data that you specify. This adds another level of personalization. White space is not added.

Test Lists and Content Rule Sets - If you plan to send an email communication to a test list, and if that email message incorporates content rule sets, be aware that populating the test emails with the appropriate content might delay your receipt of the email.

Follow these steps to create a content rule set:

Select **Content > Content Rule Sets > Create New Content Rule Set**.

The Edit a Content Rule Set wizard is displayed, which guides you through the completion of the following pages:

- Content Rule Set Properties
- Content Rule Set Match Conditions

After completing each page, click **Next Step** to advance to the next page until the content item is completed.

**i Note:**

- It is a good practice to test the variations made possible by adding content rule sets by sending the email to an appropriately diversified test list.
- You can also clone an existing content rule set record and modify the duplicate copy of the record that this generates. This option is very useful when you want to duplicate much of the data used in an existing content rule set.

# Editing Content Rule Set

## Procedure

1. Start the Edit a Content Rule Set wizard.

When you create a new content rule set record or edit an existing content rule set record, the Edit Content Item wizard starts automatically, and the Properties page opens first. A new content rule set record contains no data.

2. Supply the content rule set data field values.
3. Click **Next Step**.

The Edit Content Rule Set wizard's Match Conditions page is displayed.

 **Note:** If you modify an existing content rule set record, leave an update in the Properties page. If you modify an existing record (such as a clone), always review all existing data.

# Deleting Content Rule Set

## Procedure

1. Select **Content > Content Rule Sets**.
2. Click **Delete** on the row of the content set you want to delete.

This opens a dialog warning that deleting a content rule set affects all email communications that use this content rule set.

3. Click **OK**.

# Program Microsites

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When customers who are loyalty program members sign in to your company's e-commerce website, they typically find Reward web pages that support them and help them make the most out of their loyalty program. These loyalty program web pages, which constitute a microsite within your larger site, are tightly integrated with your e-commerce pages. The customer never knows that different elements are hosted by different groups.

Throughout our documentation, microsite refers to these web elements as the loyalty-customer-facing web portal. In a few instances, the online help refers to specific parts of this microsite, such as the Account page and the Offer Showcase, which are the two major components of the microsite.

 **Note:** Changes made in CRMS might take up to one hour to become live on the microsite (Rewards Catalog, Offers, and so on.)

Topics:

- [About Offer Showcases](#)
- [About Mobile Microsite](#)

## About Offer Showcases

There can be many variations in the way the microsite is implemented. Most of these variations depend on the design decisions your company makes as it integrates its loyalty program. Some design alternatives might exclude others, so not all loyalty program options show up in your site.

One of these microsite options is called the Offer Showcase. If your site includes this site (which might be displayed under a different name), this is where special offers, defined in CRMS and supported by the loyalty program, are presented to the customer.

When defining an offer in CRMS, you can require loyalty program members to use the Offer Showcase to take advantage of member-only promotions. This option limits access so that only loyalty members can take advantage of these offers.

## About Mobile Microsites

The TIBCO Reward Mobile Microsite add-on is a mobile optimized version of the standard microsite. When a program member accesses the microsite using a mobile device, the member is seamlessly redirected to the microsite that is optimized for mobile devices. The mobile microsite gives program members the ability to check point balances, view offers, update account information, and more from any device that supports a browser such as a mobile phone or tablet, increasing customer activity and engagement with your loyalty program and brand.

# Clienteling

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The TIBCO Reward clienteling add-on is a browser-based interface that supports a simplified set of existing customer service representative functions. The clienteling add-on gives store associates the ability to easily sign up new members, look up existing members and check members' point balances from any device that supports an Internet browser such as a tablet, mobile phone, personal computer, or web-enabled Point of Sale (POS).

Refer to [User: Roles](#) for more information about clienteling users.

## Topics:

- [Clienteling: Access](#)
- [Clienteling: Creating Users](#)

## Clienteling: Access

Clienteling users can access the clienteling user interface, which is used to look up and/or enroll customers in the loyalty program. Clienteling users do not have access to CRMS or CSR.

For clients who have implemented the clienteling add-on, the following user types can access the clienteling Interface:

- Administrator
- Category Manager
- Clienteling User
- CSR Admin
- CSR User
- Publisher
- Store Manager

The following user types do not have access to the clienteling interface:

- Advanced Reporting User
- API User
- Existing Customer User Types

## Clienteling: Creating Users

### Procedure

1. Navigate to the **Admin > CRMS Users** page.
2. Select clienteling user type.
3. Click **Add**.

This opens the Create Clienteling User page.

4. Fill in the following:
  - **First Name** : the first name that is used to identify and greet this clienteling user.
  - **Last Name** : the last name that is used to identify and greet this clienteling user.
  - **Email Address** : this must be a valid email address for this clienteling user. It is this email address that CRMS typically uses to send confirmation emails.
  - **Password** : create a unique password for this clienteling user.
  - **Re-enter Password** : confirm the new password.
  - **Select Stores** : associate this clienteling user with selected stores so that the clienteling user's actions are linked to a selected store for reporting and analytical purposes.
5. Click **Done**.

 **Note:** You can also add clienteling users through file. Please refer to [Create Users via File Import](#).

# Rewards

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This section explains the Rewards pages in CRMS.

**Topics:**

- [Reward Codes](#)
- [Reward Items](#)
- [Reward Catalogs](#)

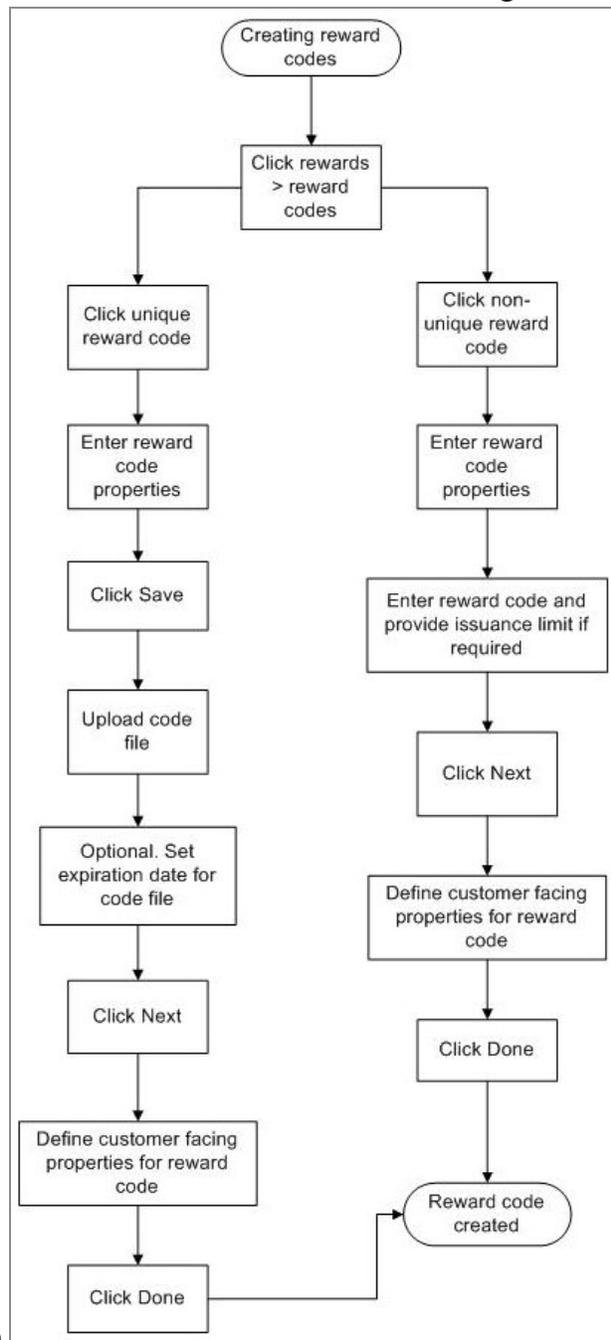
## Reward Codes

You can use the reward code functionality to create offers that issue codes as rewards. The two types of reward codes are:

- **Unique Reward Codes**
- **Non-unique Reward Codes**

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 versus using a unique code such as “123456,” which is issued only to a single customer.

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



offer showcase.

## Reward Code: Requirements

Reward codes must be uploaded from a file on your computer. Your list must contain one or more codes, separated by line breaks.

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

Here is a sample file:

090034000001

090034000002

090034000003

090034000004

090034000005

## Uploading Unique Reward Codes

Unique reward codes use an inventory of code values, each of which is unique and issued once to a customer. If you are using unique reward codes, you must upload your inventory of code values before you issue them as rewards.

### Procedure

1. Navigate to **Rewards > Reward Codes**.
2. Select **Create New Unique Reward Code**.  
The Edit Unique Reward Code screen is displayed.
3. Define properties for this unique reward code:

**i Note:** None of these values are visible to end customers.

### Name

Create a descriptive name for this reward code. This value is displayed in the grid of codes on the Reward Codes landing page.

### Reference Tag

Enter a unique identifier for this code. This value is the primary identifier for this

code used by the Reward hosted microsite, as well as Reward APIs. Note that this value must be unique among all other reward codes.

### Stored Value

Can be None, Monetary units, Monetary units off, % off, or other. Depending on your integration with Reward, this value can be passed to you or a third party through the Rewards File.

### Internal Note

Use this space to record notes about the reward code.

### Enable Dynamic Expiration Date check box

Expiration can be static (all codes expire on the same day) or dynamic (code expires X days after the **Award Date** or **Offer Start Date**).

4. Upload unique code values in the Code Inventory section of the screen: Click **Browse** to find your unique reward codes file on your computer.

**i Note:** If you have uploaded codes, you see an indication of the remaining inventory, plus the status of all prior uploads in the **Current Inventory** field.

5. Click **Upload**.
6. You can set an expiration date for the unique code by clicking the calendar and selecting a date. Leave this field empty for no expiration date.
7. Click **Next Step**.

## Defining a Non-Unique Reward Code

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 **Issue Limit** field.

### Procedure

1. Navigate to **Rewards > Reward Codes**.
2. Select **Create New Non-Unique Reward Code**.

The Edit Non-Unique Reward Code screen is displayed.

3. Define properties for this non-unique reward code:

**i Note:** None of these values are visible to end customers.

### Name

Create a descriptive name for this reward code. This value is displayed in the grid of codes on the Reward Codes landing page.

### Reference Tag

Enter a unique identifier for this code. This value is the primary identifier for this code used by the Reward hosted microsite, as well as Reward APIs. Note that this value must be unique among all other reward codes.

### Stored Value

Can be None, Monetary units, Monetary units off, % off, or other. Depending on your integration with Reward, this value can be passed to you or a third party through the Rewards File.

### Internal Note

Use this space to record notes about the reward code.

### Enable Dynamic Expiration Date check box

Expiration can be static (all codes expire on the same day) or dynamic (code expires X days after the **Award Date** or **Offer Start Date**).

4. In the Code Inventory section of the screen:
  - Enter a **Code** value. Your code can be up to 45 characters in length, and can consist of any combination of alphanumeric characters. Codes are not case-sensitive.
  - Optionally, you define the **Issue Limit**, which defines the maximum number of times that this code can be issued. Leaving this field blank results in this code being issued continually, with no limit.
5. Click **Next Step**.

This opens the Presentation page where you can define the customer facing

properties for your reward code.

## Setting Up a Reward Code Inventory Alert

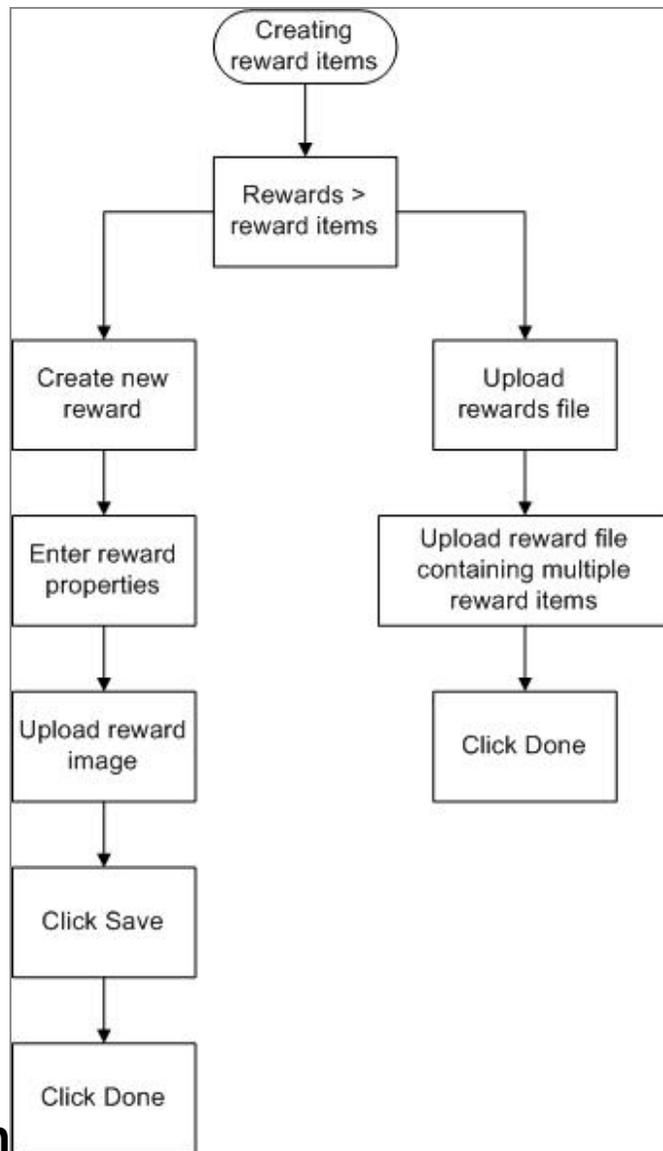
The reward code inventory alert sets a threshold for when to notify you that the reward code inventory is running low. Set the threshold as a percentage of the available reward code inventory.

### Procedure

1. Go to **CRMS > Admin > Main Settings > Alerts**.
2. Enter the email addresses for all alert recipients.
3. In the Reward Code Inventory Threshold Alert section of the page:
  - Check **When a reward code inventory fall below xx% of available inventory**.
  - Enter the % of available reward code inventory when an alert should be sent.
4. Click **Done**.

## Reward Items

The Reward Items page shows existing rewards. You can also create reward items.



## Creating Reward Item

### Procedure

1. Navigate to **Rewards > Reward Items**.
2. Click **Reward Items > Create New Reward** .  
The Manage Reward Item page is displayed.
3. Fill in the required values in the Properties section:

#### Name

This is the name used to identify this reward in CRMS. It is displayed as the title of the reward in the showcase (also known as, the Member Portal). Although CRMS does not require this text string to be unique, a unique name serves to prevent confusion.

### **Reward ID**

You can use this field to assign an ID to this reward. This ID is for internal use; it is displayed only in CRMS. It is not displayed in the showcase. Although CRMS does not require this text string to be unique ID, using a unique Reward ID is a good practice.

### **Redeem Value**

This is the number of points required to obtain this reward. Enter an integer numerical value. This value is displayed in the showcase.

### **Reward Code**

You can use this button to select already created or uploaded reward codes.

### **Description**

This description text is for internal use; it is displayed only in CRMS and not in the showcase.

### **Internal Note**

This internal note text is for internal use; it is displayed only in CRMS and not in the showcase.

4. Click **Select Code**.
5. Configure the graphical representation of the reward item in the Presentation section:

**Current Reward Image** – This image is required. If you do not have an image of the reward item, provide a suitable placeholder image as a substitute. After you have selected the path and file name, click **Upload**. The image you selected is displayed at the left, immediately beneath the label, "**Current Reward Image**".

The CRMS provides two ways to identify the image file to display with the reward:

- Select an existing product image: You can use the product name or SKU to

search for the product image.

Or

- Select from uploaded media: Click **Browse** to open a standard "**Choose File**" navigation tool.

**i** **Note:** Be sure to click **Upload** after the path and name of the image are selected.

6. When you have completed this page, click **Done**.

You can also create a new reward by cloning an existing reward. This creates a duplicate of the reward, which can be easily modified to define a different award. Cloning is especially useful when you want to duplicate most of the attributes of the existing reward.

## Reward Item: File Requirements

Your reward items file must be in one of the following formats:

- CSV Comma delimited
- Text Tab delimited

Additionally, your reward items file must include the following columns, in this exact order:

- Reward ID
- Reward Name
- Description (optional)
- Redeem Value
- Image URL

Column headers are optional in the file.

## Uploading a Reward File

Instead of manually entering your reward items, you can upload a file containing multiple reward items.

## Procedure

1. Click **Reward Items > Upload Rewards File**.
2. Click **Browse** to find reward items file you want to use.
3. Click **Upload**.

**i** **Note:** An error message is displayed if you attempt to upload a reward items file that does not comply with the content and formatting requirements.

4. When you have successfully uploaded the reward file, click **Done**.

**i** **Note:** Click **Download Sample Files** to download sample files that you can use as a format template for your own reward file.

# Reward Catalogs

You can use the Reward Catalogs page to load your own reward items into a catalog that is used for reward redemption by customers on their hosted microsite.

## Reward Catalog: Settings

The Reward Catalogs page displays **Catalog Settings** with the following catalog settings, which define how catalog items should be sorted:

### Redeem Value Ascending

You can arrange all of the reward items in order (left to right, top to bottom) according to the redemption value assigned to the item, with the lowest-valued items displayed first.

### Redeem Value Descending

You can arrange all of the reward items in order (left to right, top to bottom) according to the redemption value assigned to the item, with the highest-valued items displayed first.

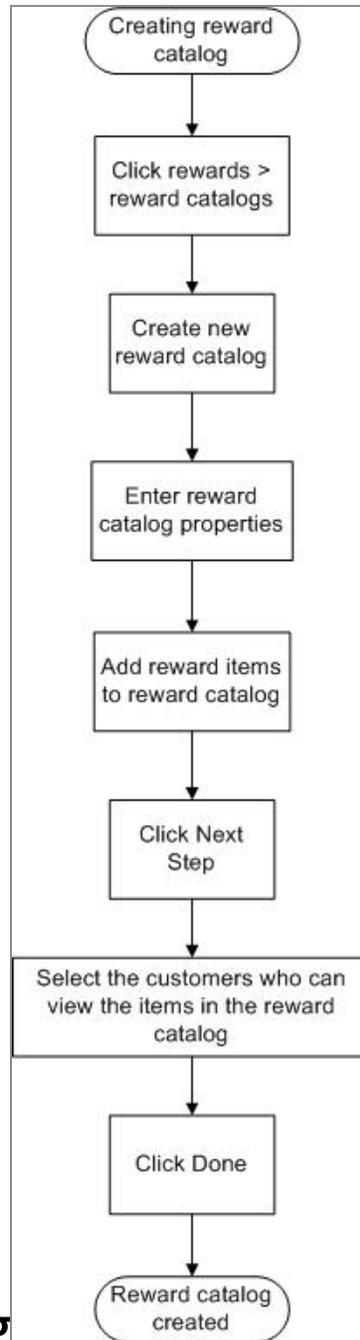
**Date Modified, Newest First**

You can arrange all of the reward items in order (left to right, top to bottom) according to the redemption value assigned to the item, with the newest (most recently added) items displayed first.

**Date Modified, Oldest First**

You can arrange all of the reward items in order (left to right, top to bottom) according to the redemption value assigned to the item, with the oldest items (those added longest back in the past) displayed first.

The Manage Existing Reward Catalogs displays the existing reward catalogs, along with their name, reference ID, number of items in the catalog, and the date it was last modified. Click the name of the reward catalog to edit the values for these fields. Additionally, you can clone or delete the reward catalog from this page.



## Creating a Reward Catalog

### Procedure

1. Select **Reward Catalogs > Create New Reward Catalog**.
2. In the Reward Catalog Details page, enter:

### **Name**

A name for this catalog.

### **Reference ID**

If you intend to access your reward catalogs through Reward APIs, enter an identifier for this catalog. This Reference ID must be a unique value among your other reward catalogs.

### **Internal Note**

Add notes or comments about this catalog.

3. Click **Next Step**, which displays the Reward Catalog Details page.
4. Click **Add Reward Items**, which displays the Select Reward Items page.
5. Select the **Reward Items** check box to be included in the catalog.
6. Click **Add Checked**.
7. Click **Next Step**, which displays the Targeting page.
8. Click **Save** or **Done**.

# Reports

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This chapter describes reports available in CRMS.

## Topics:

- [About Reports](#)
- [Reports: Customer](#)
- [Reports: Offer](#)
- [Reports: Email](#)
- [Reports: Specialized](#)
- [Point Expiration](#)

## About Reports

CRMS reports provide access to a specific sets of reports, including the following:

- Customer
- Offer
- Email
- Specialized
- Point Expiration

**i Note:** Reports reflect the Reward database, which is typically updated nightly with batch files. If the specified period for a report (the report time frame) is not yet over, the data in the report might reflect only the most recent nightly update of the database.

### Standard Format and General Information

Most reports include three components:

- Report parameter settings
- Graphic data display
- Data table

## Reports: Parameter Settings

Most reports include a short section at the top of the page, using which you can adjust some of the parameters of the report. The time period covered by the report is the most common parameter setting, for example. You can use some reports to specify the status of the customers whose data is reported (for example, Registered, UnRegistered, or All). Changing the report parameters causes graphics to be redrawn and the report data to be revised.

**i Note:** If a report or a line in a report is based on a specified period of time, but that period of time has not yet ended, then the current date is used as the end date. This affects values that represent time duration or values based on calculations in which duration is a factor.

## Reports: Graphic Data Display

Depending on the types of data represented, the graphic can take the form of a line chart, bar chart, pie chart, and so on. Note that the graphic display can have a label or subtitle somewhat different than the name of the report overall. The graphic might in fact illustrate only one aspect of the data made available in the report, using only a small subset of the total data.

**i Note:** The graphic data display can be augmented by a short table that supplies supportive details. Be aware that a longer table—the one that fulfills the primary purpose of the report—might be displayed below the table that supports the graphic. Always scroll through the entire report and check for additional tables and row data.

## Reports: Data Table

The table presenting the report data can be extensive and can include linked items that open additional detail oriented reports. A data table often includes multiple sections, and can supply sub-total or summary information at the bottom of a section.

**i Note:** Data tables often include data that is not updated in real time. For example, the membership report might be based on the most recent nightly update of the membership count.

## Specifying the Time Period

Most reports present information for at least one time period: a week, month, quarter or year, or a time period defined by a set of "custom dates" that you define using calendar date controls. This is also known as the "reporting timeframe". Using a few reports, you can request data for another time period so that you can compare data for the two different periods.

To specify a custom date range, enter a **Start date** and an **End date**.

- The **Start date** is defaulted to a month earlier than current date.
- The **End date** is defaulted to today.

When you change the time period covered by a report, the report is reprocessed.

**i Note:** As a rule, you should specify the time period for the report (the "reporting timeframe") as soon as the report is displayed, to avoid waiting for a default report to be processed.

Using custom dates, you can specify the exact date range that a report should cover. The data displayed on the report is based on the range selected. If you pick the current week, current month, current quarter, and so on, some of the most recent data might not be available. The delay varies, depending on the type of data, how it is transmitted and processed, and how your company has set up its data transfers and processing with TIBCO Reward.

You can sometimes improve the accuracy of a recent, short-term report (for example, the most recent week) by setting the end date to a date two or more days earlier than the current date.

## Terminology Used in Reports

Certain terms are used repeatedly to identify different types of data in the reports. Here are the definitions of those terms:

### Customer state/provinces – enrollment status

Usually the reports compare data about registered versus unregistered customers (that is, enrolled versus unenrolled customers). Sometimes these reports refer to "anonymous" customer data, that is, transaction file data collected that is not associated with a loyalty program member.

### Registered [customer] – Enrolled

Registered as a member of your loyalty program

### Unregistered [customer]

Current customer for whom a customer database record exists, but who is not currently enrolled as a loyalty member

### Unique

Refers to different individual customers. For example, the same customer can never be counted twice if the label refers to a "unique customer".

**i Note:** In some reports, the term "active" refers to customers who made a purchase during the time period covered by the report. An active registered customer is a customer who is registered (enrolled in your loyalty program) and who has completed a transaction during the reporting timeframe.

### Customer Count

The quantity of unique (individual) customers in the report timeframe, or in a level of a report, who meet the stated criteria.

### Net Transactions

The quantity of transactions occurring within a report timeframe or report level. Returns (transactions with negative value) are counted as negative transaction. Even exchanges (zero value transactions) are not counted as transaction.

**i Note:** The Net Transactions count can easily be misinterpreted if your POS system does not match item return transactions to item purchase transactions. For example, if a customer buys multiple items in one transaction, that counts as one transaction. If the same customer returns just one of the items on a subsequent day, the return transaction might count as one negative transaction. With respect to the net transaction value, the return of the one item in this scenario effectively cancels the purchase of several items. (Note, however, that some POS systems match the purchase and return transactions, which eliminates this problem.)

### **Net Monetary Unit Sales**

The sum of the monetary unit value of all transactions occurring within a report timeframe or report level.

### **Average Sales**

The ratio of net sales to customer count at the end of each report timeframe or period.

### **Net Unit Sales**

The sum of the unit quantity in all transactions occurring within a report timeframe or report level.

### **Customer Count**

Quantity of unique customers making a purchase in each timeframe level.

## **Reports: Customer**

The Customer Reports page provides access to reports in the following categories:

- Customer Reports
- Tier Reports

For general information about setting up, reading, and using reports, including details about their standard format, contents, column and row headings, refer to [About Reports](#).

## Sales Performance by Customer States (Time Series Analysis)

This report analyzes spending amount and transaction quantity by customer type by individual store or by all stores combined. The customer type refers to the account status and includes unregistered (not enrolled) customers, registered (enrolled) customers, and total customers (enrolled and not enrolled).

It also provides a good representation of the distribution of business by store, or by all stores combined. Graphical comparison shows spending by customer type over time, and can be used to spot short and long term trends in spending behavior with variations by customer status.

## Customer Purchase Activity Report

This report lists the number of customers who performed a transaction over specified periods of time.

You can use the report to compare customer purchases over two comparable periods of time. It provides two graphics and two corresponding sets of customer activity data. You can select or define the two periods. For each period, the report lists the number of customers who have made a transaction during two specified periods (usually of the same length of time). You can use this report to compare customer numbers for these two similar periods.

**i Note:** The reported numbers refer only to the entire customer transaction, that is, to the checkout, the visits resulting in a purchase of some kind. There is no differentiation among channels, stores, and so on. Two sets of customer numbers are reported: Anonymous customers (any customer who completed a transaction) and Registered customers (enrolled customers).

## Customer Activity by Channel Report

This report actually provides a Channel Activity report. It shows how many customers are using each channel (retails stores, eCommerce site, third party channels, call-center, and so on) during a specified period of time.

**i Note:** For channel data to be included in this report, your company must be reporting data for the channel to TIBCO Reward.

A pie chart graphically shows the relative proportions of the customers using each channel during the specified time period. Below the chart, numbers in a table further break down the customer data into quantities of anonymous and registered (enrolled) customers.

## Channel Data Listed In Rows

Each row shows information about a different channel, as defined by your company. The order in which channels are listed is normally based on the number of customers, starting with the highest number and continuing in descending order.

**i Note:** In each row meant to contain store data, the row displays the store name unless the store ID provided by the retailer is not defined in the TIBCO Reward system. In that case, the display lists stores by the ID provided by the retailer. If the store ID column is null, the label "**Unknown**" is displayed.

## Sales Performance Comparison (Time Series Analysis)

At the top of this report, before the data table, this report features a set of store-oriented graphics that can compare the sales performances of two stores over time, or compare the sales average of one store against the sales average of all stores.

This report shows how the spending behavior of customers varies over time by store and customer status. It can indicate whether certain stores and/or enrollments are leading to a higher spending levels over time, or indicate whether sales are shifting based on store attributes or initiatives. The data table breaks the numbers down into registered, unregistered, and total customer categories for further analysis.

## Sales Performance by Customer States

This report presents customer, transaction, sales totals, and sales averages in tabular form for all stores and channels, by customer type (Registered, Unregistered, and Total/Both).

When you first open this report, it also displays, on the first page, a bar chart showing data for your top ten sales channels. This bar chart shows the average sales for both registered and unregistered customers at some of your most successful stores and/or channels.

This report is useful when you want to see basic sales figures for registered versus unregistered customers. It also provides sales numbers for your channels, and you can compare channels and their loyalty program enrollment levels. The report helps you to see which loyalty program initiatives lead to higher spending levels over time, or if sales are shifting from one store to another.

Each report covers a period of time that you specify, either by selecting a standard option (for example, this week, last week, this month, last month, this quarter, last quarter, YTD, and so on) or by using calendar controls to specify any range of dates that interests you.

### Individual Channel/Store Sales Performance Detail Report

If your site includes store data, and you click the name of an individual store (which is set up as a link), another more detailed level of reporting might be displayed, showing details about the sales performance of the selected channel or store over smaller segments of time within the specified period.

Rows containing web, catalog, and other channel data do not necessarily have linked names, and corresponding detail reports for these channels are not necessarily available through this report (Sales Performance by Customer States).

At the detail report level, unregistered versus registered customer data is displayed in the bar chart, and a table lists data for Unregistered (not enrolled), Registered (enrolled), and Total (both) customers.

### Notes on column headings and how values in columns are derived.

#### Customer Count

Quantity of unique customers making a purchase through the specified channel. This number is not mutually exclusive across channels. For example, a customer who buys in two channels shows up in both columns. This means that the Total column is not the sum of the Channel columns.

### **Net Transactions**

Quantity of transactions occurring within this channel. Returns (transactions with negative value) are counted as a negative transaction. Even exchanges (zero value transactions) are not counted as a transaction. Net transactions are mutually exclusive across channels.

### **Net Monetary Unit Sales**

Sum of the monetary unit value of all transactions occurring within this channel.

### **Average Sales**

Net sales divided by customer count at the end of each period.

### **Net Unit Sales**

Sum of the unit quantity in all transactions occurring within this channel.

### **Notes on Channel data listed in rows**

This report includes rows of information about all stores and channels. Stores are listed first, then other categories (web, catalog, customer-defined). Stores are listed in order by total sales; the store with the highest total sales for the specified period is listed first; the store with the lowest is last.

In each row containing store data, the row displays the store name unless the store ID provided by the retailer is not defined in the Reward system. In that case, the display lists stores by the ID provided by the retailer. If the store ID column is null, the label "**Unknown**" is displayed.

The last row contains the grand totals for all channels.

## **Gender Breakdown Report**

This report, also known as Total Customer Breakdown by Gender, includes a pie chart depicting the customer population, with segments identified as Male, Female, and Unknown (gender not stated).

The data is not broken down into channels, customer types, or any other subcategory other than gender.

# Sales Performance by Customer Stated Category Preference

This report shows sales performance data (net sales, transactions, units) for customers who expressed preferences for one or more product categories. At their sign up, customers are asked to select their product category preferences. The product categories listed in this report are the same product categories presented to customers at that time.

This report includes a horizontal bar chart and a data table. The bar chart shows the net sales, within the dates selected, for the customers who selected a category preference from one of the top ten categories. The data table provides more types of sales data, and also provides data about the customers who did not express a category preference. The data table also contains data for more product categories.

You can select the period of time from which the sales performance data is drawn. You can also select one of the following options from a drop-down field to select the number of categories included in the report:

- Top 10 Categories by Total Net Sales (selected by default). Note: The bar chart always shows the top ten product categories.
- Top 20 Categories by Total Net Sales
- Top 50 Categories by Total Net Sales
- Top 100 Categories by Total Net Sales

Retailers can use this data to understand what categories their customers are most interested in, and how sales correspond to a customer's preferences.

## **Notes on column headings and how values in columns are derived.**

All data is current as of the date the report is run.

## **Categories**

It is a list of categories. Note that this includes the catch-all category for customers who did not specify a category preference; this is titled, "No Stated Category Preference."

This list also includes a "**Total**" category.

**i Note:** The number in each column of the **Total** row is not the sum of the values in that column. Each row refers broadly to a category, but some customers specify preferences for multiple categories, so the customer counts do not add up. The sales, transactions, and units in the category rows do not add up to the corresponding total numbers either, because they reflect the total sales (in any category) associated with any customer who purchased within that category.

- Registered (enrolled) Customer Count in each category, as of the date the report is run. Registered customer count is the count of registered customers as of the end date of the selected period.
- Active customers in each category (that is, individual customers who expressed preferences within the category within the specified time period).
- Total Net Sales is total net sales in any category, within the dates selected, for the customers who selected the category preference.
- Net Transactions is net transactions in any category, within the dates selected, for the customers who selected the category preference.
- Net Units is net units purchased, within the dates selected, by the customers who selected the category preference.

#### **Notes on Channel data listed in rows.**

#### **Categories**

The number of listed categories is based on your selection. Categories are sorted by total net sales (high to low) and displayed in a flat list.

#### **No Stated Category Preference**

This row includes sales data for customers who did not provide category preferences.

#### **Total**

Totals of the net sales for all customers (regardless of their category preferences) over the time selected. This data covers both the customers who did and did not express a category preference. Note that this is not the sum of data in the above rows (because customers can select more than one category and their data can be displayed in more than one row).

# Reports: Offer

The sole offer report provided on this page is the All Offer Performance Report.

## All Offer Performance Report

The All Offer Performance Report provides, for each offer made available during the specified time period (the reporting timeframe), a line graph and a table.

This report shows, for every offer open over the selected timeframe, the key metrics used to compare the performance of offers.

The line graph shows the Views, Accepts, and Total Redeems of all offers published during the specified time period (the reporting timeframe).

The table provides data describing each offer that was made live during the reporting timeframe. Each row includes the Views, Accepts, and Total Redeems, and also the Unique Redeems and the Redemption value of the redeemed offers.

### **Notes on graph labels, table headings and how values are derived:**

#### **Views**

The number of times the offer has been viewed. If, because of the page design, the customer does not need to open a separate view page, this number might be low or zero.

#### **Accepts**

The number of times the offer has been accepted (according to click records).

#### **Unique Redeems**

The number of unique customers who have redeemed the offer.

#### **Total Redeems**

The number of times the offer has been redeemed.

#### **Redemption Revenue**

The revenue associated with the redemptions.

**i Note:** Ignore the Refer a Friend (RAF) data in this report. The Refer a Friend data is displayed in this report because Refer a Friend is fundamentally a special type of offer, albeit one that has special qualification logic and award rules. Note, however, that because of its special characteristics and essential differences from normal offers, Reward does not support the Refer a Friend (RAF) data in this report.

## Reports: Email

Under the **Reports** tab, CRMS offers the Email Reports page. This Email Reports page provides access to reports in the following categories:

- Campaign Reports
- List Management Reports

This Reports page provides a brief description of each email report, including details about specific features and definitions of each type of data in the report.

## Campaign Summary Report

This report provides information about CRMS campaigns, including the following:

- The campaign's start and end dates
- The number of people who received the sent emails
- The response to the email campaign
- The quantitative value of the response

The report lists the campaigns that took place during the time period you specify (the reporting timeframe).

For detailed reports that include data about each campaign, click the name of the campaign under the **Campaign Name** heading. (Campaign names are set up as links.) The Campaign Detail Report is displayed, showing data for the selected campaign.

You can also see campaign detail reports for any campaign by clicking the link to the Campaign Detail Executive Report. You must know the name of the campaign for which you want details.

**Notes on column headings and how values are derived:****Tracking Start Date**

This is the tracking start date that was defined for the campaign. This is the first date when information about sales associated with the campaign is tracked. The tracking start and end dates define the period for which sales is tracked. It is called the tracked period.

**Tracking End Date**

This is the tracking end date that was defined for the campaign. This is the last date when information about sales associated with the campaign is tracked.

**Sent**

Sum of the individual emails sent during the tracked period.

**Recipients**

The number of unique customers who received an email communication during the campaign's tracked period. This is based on a simple difference calculation: sent emails minus bounced emails.

**Respondents**

The number of recipients who made a purchase during the campaign's tracked period.

**Response Rate**

A ratio: Respondents divided by Recipients, expressed as a percentage.

**Response (Rate) Lift**

This equates to the following:  $(\text{Promoted Group Response Rate} - \text{Control Group Response Rate}) / \text{Control Group Response Rate}$ ; where Control Group Response Rate is the number of customers in the control group who made a purchase during the tracking period divided by the total number of members of the control group). Note that this value is set to "N/A" if one or more communications within the campaign do not have a control group.

**Tracked Sales**

Sales from the promoted group during the tracked timeframe.

### **Sales Per Recipient**

This equates to the following: Tracked Sales/Recipients.

### **Sales Per Respondent**

This equates to the following: Tracked Sales/Respondents.

### **Incremental Sales Monetary Units (versus Control Group)**

This equates to the following: Recipients \* (Promoted Group Sales per Recipient – Control Group Sales per control group population). Note: This value is set to "N/A" if one or more of the communications within the campaign does not have a control group.

### **Duration in Days**

This is the number of days tracked, based on a difference calculation: the end date minus the start date. Note: If the campaign is still in progress, the current date is used as the end date.

### **Incremental Sales Monetary Units Per Day**

This equates to the following: Incremental Sales Monetary Units/Duration. Note: This value is set to "N/A" if one or more of the communications within the campaign does not have a control group.

## **Campaign Detail Executive Report**

This report includes data about each email communication associated with a campaign.

To open this report, navigate to the **Reports > Email** page and click the link to this report. Then select the name of the campaign from the drop-down list.

### **Notes on column headings and how values are derived:**

#### **Sent**

Sum of individual emails sent during the tracked period.

#### **Recipients**

The number of unique customers who received an email communication during the campaign's tracked period. This is based on a simple difference calculation: sent emails minus bounced emails.

## **Respondents**

The number of recipients who made a purchase during the campaign's tracked period.

## **Response Rate**

A ratio: Respondents divided by Recipients, expressed as a percentage.

## **Response (Rate) Lift**

This equates to the following:  $(\text{Promoted Group Response Rate} - \text{Control Group Response Rate}) / \text{Control Group Response Rate}$ ; where Control Group Response Rate is the numbers of customers in the control group who made a purchase during the tracking period divided by the total number of members of the control group). Note that this value is set to "N/A" if one or more communications within the campaign do not have a control group.

## **Tracked Sales**

Sales from promoted group during the tracked timeframe.

## **Sales Per Recipient**

This equates to the following:  $\text{Tracked Sales} / \text{Recipients}$ .

## **Sales Per Respondent**

This equates to the following:  $\text{Tracked Sales} / \text{Respondents}$ .

## **Incremental Sales Monetary Units (vs. Control Group)**

This equates to the following:  $\text{Recipients} * (\text{Promoted Group Sales per Recipient} - \text{Control Group Sales per control group population})$ . Note that this value is set to "N/A" if one or more of the communications within the campaign does not have a control group.

## **Duration in Days**

This is the number of days tracked, based on a difference calculation: the end date minus the start date. Note: If the campaign is still in progress, the current date is used as the end date.

## **Incremental Sales Monetary Units Per Day**

This equates to the following:  $\text{Incremental Sales Monetary Units} / \text{Duration}$ . Note: This value is set to "N/A" if one or more of the communications within the campaign does not have a control group.

## **Lack of Control Group Results in "N/A" values.**

If even one email communication associated with the campaign is not assigned a control group, all values that rely on control group numbers become invalid, and are omitted from the reports for a campaign. They are replaced with the value "N/A". Specifically, values in the following columns are omitted: Response (Rate) Lift, Incremental Sales Monetary Units (versus Control Group), and Incremental Sales Monetary Units Per Day. To see these values, every email communication associated with a campaign must have a control group.

## Campaign Detail Extended Report

This report includes data about each email communication associated with a campaign. It provides all of the data supplied by the Campaign Details Executive Report and also provides the following data about the control group:

- Control Group Population
- Control Group Respondents
- Control Group Response Rate
- Control Group Tracked Sales
- Sales Per Control Group Member

To open this report, navigate to the **Reports > Email** page and click the link to this report. Then select the name of the campaign from the drop-down list.

 **Note:** Control groups are required for all email communications in a campaign.

If even one email communication associated with the campaign is not assigned a control group, none of the values that are based on comparisons with a control group are provided in the reports. They are all replaced with the value "N/A". To see values in the columns listed, or in the other columns that depend on control group, all email communications associated with a campaign must have a control group.

Columns/values that depend on control group include the control group values and also the following:

- Response (Rate) Lift
- Incremental Sales Monetary Units (versus Control Group)
- Incremental Sales Monetary Units Per Day

# Email Performance Executive Report

This report provides information about the success of the email in terms of the numbers of recipients who received, opened, and used the email. View email delivery, open, click-through rates and other results for all emails sent during the reporting timeframe that you specify.

## Notes on column headings and how values are derived:

### Publish Start Date

The publishing start date for the email communication: the first day that published information about the offer became available to customers.

### Publish End Date

The publishing end date for the email communication: the last day that published information about the offer was available to customers.

### Quantity Sent

The number of emails assigned and sent to a unique address for this email communication.

### Delivery Rate

The percentage of sent emails that arrived at their addresses. In other words, this is the ratio of delivered to sent emails.

### Quantity Bounced

The number of unique sent emails that were bounced. The reason can be a hard bounce or a soft bounce.

### Bounce Rate

The percentage of sent emails sent that were not delivered. In other words, this is the ratio of unique bounced emails to unique sent emails. The reason can be a hard bounce or a soft bounce.

### Quantity Delivered

The number of sent emails that arrived at their address for this email communication.

**i Note:** The Bounce Rate plus the Delivery Rate = 100%.

## Opens Unique

The number of individual emails with a unique address that were opened.

**Regarding Open-Related Values in This Report:** The embedded image used to track the opening of an email is not accessible in text-based emails, and some email providers block this image so that the link associated with the image is not triggered. The result is that a view (that is, an "open," which is an individual viewing of an email) is not tracked by the most direct means available, and the opening of the email might not be counted. However, if the customer clicks on any trackable link in the email and if the email was not already tracked (that is, counted as a viewed email), Reward assumes that the email was in fact opened and viewed, and the email is reported as an opened email.

## Opens

The total number of times that recipients of an email communication opened the email, including repeated openings of the same unique mail. For example, if the same recipient opens one individual email thrice, each of these three instances of opening are included in this count.

## Unique Open Rate

The ratio of individual emails with a unique address that were opened divided by the number of such emails that were delivered. In other words, this is the ratio of unique opened emails to unique delivered emails.

## Unique Clicks

The total number of individual emails with a unique address that were delivered and that the recipient interacted with, by clicking at least one tracked link.

## Unique Click Rate

The ratio of clicked emails to delivered emails. That is, the ratio of emails with which the recipient interacted by clicking a tracked link divided by the number of emails that were delivered.

# Email Performance Extended Report

This report provides information about the success of the email in terms of the numbers of recipients who received, opened, and used the email. View email delivery, open, bounce-data, click-through rates and other results for all emails sent during the reporting timeframe.

This report includes three types of values that are set up as links to additional detail reports:

### **Notes on column headings and how values are derived**

#### **Communication Name**

The name of the email communication. All data in the row references this email communication. The name links to the Email Communication Report.

#### **Publish Start Date**

The publishing start date for the email communication: the first day that the published information about the offer became available to customers.

#### **Publish End Date**

The publishing end date for the email communication: the last day that the published information about the offer was available to customers.

#### **Quantity Sent**

The number of emails assigned and sent to a unique address for this email communication.

#### **Delivery Rate**

The percentage of sent emails that arrived at their addresses. In other words, this is the ratio of delivered to sent emails.

#### **Quantity Bounced**

The number of unique sent emails that were bounced. The reason may be a hard bounce or a soft bounce.

#### **Bounce Rate**

The percentage of sent emails sent that were not delivered. In other words, this is the ratio of unique bounced emails to unique sent emails. The reason may be a hard bounce or a soft bounce.

#### **Quantity Delivered**

The number of sent emails that arrived at their address for this email communication.



**Note:** The Bounce Rate plus the Delivery Rate = 100%.

### **Opens Unique**

The number of individual emails with a unique address that were opened.

### **Opens**

The total number of times that recipients of an email communication opened the email, including repeated openings of the same unique email. For example, if the same recipient opens one individual email three times, each of these three instances of opening are included in this count.

### **Unique Open Rate**

The ratio of individual emails with a unique address that were opened divided by the number of such emails that were delivered. In other words, this is the ratio of unique opened emails to unique delivered emails.

### **Unique Clicks**

The total number of individual emails with a unique address that were delivered and that the recipient interacted with, by clicking at least one tracked link.

### **Unique Click Rate**

The ratio of clicked emails to delivered emails. That is, the ratio of emails with which the recipient interacted by clicking a tracked link divided by the number of emails that were delivered.

### **Unsubscribed**

The total number of unique emails to which the recipient responded by unsubscribing (clicking the link that results in a customer opt-out).

### **Unsubscribed Rate**

The rate of unsubscribe requests (generated by clicks from within this email communication) to delivered unique emails.

## **Clickthrough Analysis by Email**

This report provides the click-through results for all trackable links in an email communication. You select the email communication to be the subject of this report, and the resulting report lists the following data for each trackable link:

## Link

Link text strings are listed, not necessarily in alphanumeric order. Be aware that you have the option to assign a name to a link. This name is an alternate to the entire text of the link, and can be shorter and easier to recognize and interpret than the full length link text.

## Unique clicks

The number of unique customers who clicked on a link in an email communication.

## % (percent) of delivered

The ratio of clicks on a link to unique emails delivered. More specifically, the total number of clicks on the link in an email communication as a percentage of the unique emails delivered for that communication.

## % (percent) of opens

The ratio of clicks on a link to unique emails opened. More precisely, this is the total number of clicks on the link in an email communication expressed as a percentage of the unique emails in that communication that were opened.

# Email Performance over Time

This report provides hourly updates about "opens" of an email and clicks on links in the email. For the purpose of this report, an "open" is an instance of a recipient opening a unique email; any click of a tracked link in the email is considered a "click".



**Note:** This report covers the first three days after the publish start date.

This report includes a line graph and a table; both show unique opens and unique clicks on an hourly basis for the first three days from the offer publish date. This data is refreshed nightly.

The graph shows when larger numbers of emails are being opened during the first three days.

The table provides supporting numerical detail -- also hourly, and also for the first three days -- for unique opens count, repeated opens and clicks within the same unique email.

## Notes on graphics labels, column heading, and how the values are derived

## Opens Unique

The number of individual emails with a unique address that were opened.

## Opens

The total number of times that recipients of an email communication opened the email, including repeated openings of the same unique mail. For example, if the same recipient opens one individual email thrice, each of these three instances of opening are included in this count.

## Unique Clicks

The total number of individual emails with a unique address that were delivered and that the recipient interacted with, by clicking at least one tracked link

## Clicks

The total number of clicks on a tracked link in opened individual emails with a unique address

# Email Report: Email Bounce Analysis

The bounce descriptions used in the Email Bounce Analysis Report are derived from those supplied by BoogieTool.com®; Reward's third party partner, which actually performs the bounce analysis. The tool used to process the bounces is called BoogiePOP Advantage™.

This table contains definitions for the various terms used in the bounce analysis report.

Activity Type	Description	Examples
Auto Reply (AR)	An automatic response from the recipient.	“Out Of Office”, “Vacation Message”
Bounce With No Email Address (BN)	BoogiePOP Advantage (the tool used by Reward's third party partner, which performs the bounce analysis) determined that the message was a bounce, but it could not resolve the original email recipient email address. Rare.	

Activity Type	Description	Examples
Challenge-Response Message (CR)	A Challenge-Response message is an automatic response from the recipient, requesting that the sender confirm that a real person is sending the message. Generally, confirmation is completed manually by clicking on a hyperlink within the Challenge-Response message itself.	
Feedback Loop Report	A feedback loop is a system by which the ISP provides the sender a copy of a message that a subscriber has reported as spam – usually by hitting a " <b>Report Spam</b> " button.	
General Bounce (GB)	The email server could not deliver your email message, but the bounce message was unclear as to what kind of bounce it was. Most BoogiePOP Advantage users treat these as soft bounces.	“Subject: Undeliverable mail”
Hard Bounce (HB)	The email server could not deliver your email message.	“550 User Unknown”
Mail Block - General (MB)	Indicates that the recipient’s email server is blocking email from your email server.	“550 Message REFUSED by peer”
Mail Block - Known Spammer (MBKS)	Indicates that the recipient’s email server is blocking the email from your email server because it believes you are a known spammer.	“REJECT Known SPAM source”
Mail Block - Spam Detected (MBSD)	Indicates that the recipient’s email server is blocking email from your email server because the message seems to have content that looks like spam.	“550 Possible spam detected”
Mail Block - Attachment Detected (MBAD)	Indicates that the recipient’s email server is blocking email from your email server because the email message contained an attachment.	“552 Disapproved attachment”

Activity Type	Description	Examples
Mail Block - Relay Denied (MBRD)	Indicates that the recipient's email server is blocking email from your email server.	"551 relaying denied"
Non Bounce (NB)	BoogiePOP Advantage determined that the message was not a bounce. This could be a recipient reply, or might be a bounce format that BoogiePOP Advantage did not recognize.	
Soft Bounce - General (SB)	The email server is temporarily unable to deliver your message to the recipient email address.	"Connection timed out"
Soft Bounce - DNS Failure (SBDF)	The email server is temporarily unable to deliver your message to the recipient email address because of a DNS problem.	"Host is unreachable"
Soft Bounce - Mailbox Full (SBMF)	The email server is temporarily unable to deliver your message to the recipient email address because the recipient's email box is full.	"Mailbox over quota"
Soft Bounce - Message Size Too Large (SBMS)	The email server could not deliver your message to the recipient because the message size is too large.	"Exceeded maximum inbound message size"
Subscribe Request (SR)	Someone is requesting to be added to your opt-in email list. BoogiePOP Advantage looks for subscribe requests in the subject header of the email message, and on the first line of a text based email message.	
Transient Bounce (TB)	The email server temporarily can not deliver your message, but it is still trying.	"Warning: message still undelivered after 4 hours. Will keep trying until message is two days old"

Activity Type	Description	Examples
Unsubscribe Request (UR)	Recipient is requesting to be removed from future email from you. BoogiePOP Advantage looks for unsubscribe and remove requests in the subject header of the email message, and on the first line of a text based email message.	

## List Performance Summary Report

This report provides data concerning the performance of a selected set of your lists based on sale data for a specified time period. Specify one time period from which the lists are selected and another time period from which the sales totals are collected. (The two periods can of course overlap or be exactly the same.)

This report includes a horizontal bar chart and a data table.

The bar chart shows the top ten lists from your selection, rated according to their net sales for the specified period.

The data table provides a row of data for each list. Each row includes the following data for each list:

### List Name

This is the name assigned to the list by CRMS user who created it.

### List ID

The CRMS-assigned identification number assigned to each list, which serves to provide a unique ID for each list.

### List Creation Date

The date when the list was created in or introduced into CRMS. Although the list might have existed earlier in another environment, this date refers to the creation of the list with respect to the CRMS list management system.

### Customer Count

The total number of customers in each list. More accurately, this is the customer count for each list -- based on the customer count when the list was created. Be aware that

the names in each list are validated for format when they are created, that is, when they are imported into CRMS. This tends to reduce the size of some externally generated lists by a small percentage. Note that the total customer count is the count of all unique customers -- not just those on a list -- as of the end of the specified period.

### **Active Customer Count**

The total number of customers in each list who made a purchase within the sales dates selected.

### **Total Net Sales Monetary Units**

The total number of sales monetary units produced as income by active customers in a list within the dates selected. This number accounts for returns.

### **Net Transactions**

The total number of net transactions by active customers in a list within the dates selected. Refunds and returns (transactions with negative value) are counted as a negative transaction. Even exchanges (zero value transactions) are not counted as a transaction.

**i Note:** The net transactions count can easily be misinterpreted if your POS system does not match item return transactions to item purchase transactions. Consider if a customer buys multiple items in one transaction, that counts as one transaction. If the same customer returns just one of the items on a subsequent day, the return transaction might count as one negative transaction. With respect to the net transaction value, the return of the one item in this scenario effectively cancels the purchase of several items. (Note, however, that some POS systems match the purchase and return transactions, which eliminates this problem.) Thus, the net transactions value can be skewed towards a conservative measure, depending on how your POS system processes returns.

### **Net Units**

The total number of net units sold during the dates selected.

**i Note:** The totals on the bottom line are not the totals of the numbers listed directly above in the same columns; rather, they are totals of the unique customers, unique active customers, and their related data. (Because multiple lists inevitably overlap with each other, a simple total of the listed numbers counts the same customer data multiple times yielding incorrect figures.)

The total value for Net Sales Monetary Units is simply the total sales over the time selected. This value does not apply to list names, list ID and list creation date; it is simply the total sales over the time selected.

## List Performance Time Series Report

This report provides data showing the performance of a list over time. You select the list and the time period. You can also select the time frames or increments into which the report data is divided; for example, you can specify that you want a month's worth of data presented in weekly increments.

This report provides a line graph and a data table.

The line graph shows, for the specified time period, the performance of the list in terms of the sales generated by the list members, on a weekly basis.

The data table includes a row for each time increment in the report (of a length determined by your specification). Each row includes data under the column headings.

### Notes on column headings and how values are derived

#### Registered Customer Count

Quantity of unique registered customers (Loyalty Program members) in the list. This customer count is the count of registered customers as of the end date of the period for each row.

#### Unregistered Customer Count

Quantity of unique non-registered customers (non-Loyalty Program members) in the list. This customer count is the count of non-registered customers as of the end date of the period for each row.

### **Active Registered Customer Count**

Quantity of unique registered customers in the list who made a purchase in the timeframe level.

### **Active Unregistered Customer Count**

Quantity of unique unregistered customers in the list who made a purchase in the timeframe level.

### **Net Sales Monetary Units (Registered Customers)**

Total sales to registered customers in the list, for transactions occurring within the timeframe level.

### **Net Sales Monetary Units (Unregistered Customers)**

Total sales to non-registered customers in the list, for transactions occurring within the timeframe level.

### **Net Transactions (Registered Customers)**

Quantity of transactions by registered customers occurring within the timeframe level. Returns (transactions with negative value) are counted as a negative transaction. Even exchanges (zero value transactions) are not counted as a transaction.

### **Net Transactions (Unregistered Customers)**

Quantity of transactions by non-registered customers occurring within the timeframe level. Returns (transactions with negative value) are counted as a negative transaction. Even exchanges (zero value transactions) are not counted as a transaction.

### **Net Unit Sales (Registered Customers)**

Sum of the unit quantity in all net transactions by registered customers occurring within the timeframe level.

### **Net Unit Sales (Unregistered Customers)**

Sum of the unit quantity in all net transactions by non-registered customers occurring within the timeframe level.

## **Reports: Specialized**

The Specialized Reports page actually includes reports in several categories:

- Specialized Reports
- Signage Reports
- Activity Reports
- CSR Activity Reports

**General rules:**

Click the name of a report to generate it. You can customize the contents and format of most reports. As soon as the report opens, select the subject of the report and specify the time periods that you want the report to cover.

**Customer Recency Report**

Both the graph and the table in this report show how many customers (both registered and anonymous customers) made a purchase every week in the past year. This report shows the most recent purchase made by your customers.

A registered customer is a customer enrolled in your loyalty program. An anonymous customer is a non-registered customer who performed a transaction.

**i Note:** Anonymous customers cannot be distinguished from one another or from one transaction to the next, so it is possible that individuals who make multiple purchases (without identifying themselves) are counted multiple times as anonymous customers.

This report does not provide calendar dates.

**Points Time Series Report**

Also known as the Points Summary Report, this report shows points earnings and redemption data over time.

This report shows your outstanding points liability, that is, the number of points your company has awarded that have not been redeemed.

To set up this report, select the total report timeframe that the report covers, and the smaller time increments (periods) for which data is reported.

For each incremental period of time covered by the report, the following data is provided:

### **# Customers Earning Points (No Offers)**

The number of unique customers who earned points outside of an offer (that is, points awarded by the main program, tiers, clubs, or by CSR agents).

### **Total Points Earned (No Offers)**

The total number of points earned by unique customers who earned points outside of an offer (that is, points awarded by the main program, tiers, clubs, or by CSR agents).

### **# Customers Earning Points (Offers)**

The number of unique customers who earned points through an offer.

### **Total Points Earned (Offers)**

The total number of points earned by unique customers who earned points through an offer.

### **Total Points Used (Awards)**

The total number of points used (that is, redeemed, spent, burned) by customers in exchange for rewards.

### **Total Awards Earned (monetary units)**

The monetary unit value of the total points earned by customers.

### **Number of Awards Earned**

The number of awarded units earned by customers.

### **Outstanding Points**

The total number of points earned by customers that currently remain unused or unredeemed (and unexpired, if your company causes points to expire). Note that there is no total shown on the bottom line in the Outstanding Points column; this is because each row shows a running total for the given time period. Totals for each of these values over the entire report timeframe are also provided (except for the outstanding points values, which already take the form of running totals).

## **Signup and Membership Report**

This report shows the number of signups and closed accounts for a selected reporting timeframe, and also the number of currently registered members.

You select the total report timeframe that the report covers, and the time increments (periods) for which the data is reported.

Included in the report are two line graphs and a data table. The first report indicates the number of new signups and account closures per reporting period. The second report indicates the membership over time.

The data table shows, for each reporting period, the following data:

**New Signups (in time period)**

The number of new loyalty program enrollments during an increment of time.

**Closed Accounts (in time period)**

The number of loyalty program un-enrollments during an increment of time.

**Total Active Accounts**

The number of currently enrolled loyalty program members at the end of a reporting time period.

This report is a good indicator of the effectiveness of recruiting new members. A decline in signups might warrant an initiative or drive to sign up more members.

## Custom Question Detail Report

This report shows how customers responded to a selected custom question and provides sales data for customers based on their response (including non-response) to that custom question. Sales data is supplied for each category of customers, where the categories are defined as the customers who gave the same response to the question.

The report includes a bar chart and a data table.

The bar chart shows the percentage of customers who gave one answer or another, or no answer; and the percentage of total sales (from the population exposed to the question) that came from each customer category.

**i Note:** The numbers returned from customer responses can add up in different ways. Many questions have just one answer, that is, one alternative. One customer supplies one answer to one such question, and this counts as one "Unique Customer Response". However, some questions have multiple responses; for example, any question whose instructions say, "Check all that apply." For questions such as these, one customer can supply multiple responses. For these questions, each selected check box or button counts as one "Unique Customer Response".

### Notes on custom question data listed in rows

The data table addresses the total population that was asked to respond to the question. Sales data is provided for the following:

- The total population, including those who answered and those who did not; labeled **"Total"**
- Each group of customers that clicked on a particular response.
- The population subgroup that clicked on any of the possible responses; labeled **"Total for any Answer"**.
- The population subgroup that did not click any response; labeled **"No Answer"**.

### Notes on column headings and how values in columns are derived:

#### Unique Customer-Responders

The number of unique (different) customers responding to the custom question

#### Net Transactions

The total number of transactions associated with the unique customers during the specified time period.

#### Net Sales

The sum of the sales associated with the unique customers during the specified time period.

#### Net Units

The sum of the units sold in transactions associated with the unique customers during the specified time period.

### **% of total customers**

The percentage of the total number of customers asked to respond to this custom question. For the Total row, this is always 100%.

### **% of total sales**

The percentage of total sales associated with the customers asked to respond to this custom question. For the Total row, this is always 100%.

### **Sales per customer**

The net sales figure divided by the number of Unique Customer-Responders.

## **File Import Summary Report**

The File Import Summary Report provides status updates and other useful information about the outcome of their batch imports or list file uploads. It also provides access to details about each import file.

To set up this report, use the controls at the top of the report.

- To select a timeframe for the report, choose from the drop-down list of standard options, or customize the timeframe by specifying a range of dates. If you change the timeframe, click the button labeled **View Report** to be sure that the report is regenerated.
- Navigate through the report by using the arrow controls. You can also find data by searching for strings that occur in the report. Use the data entry box in front of the **Find** control.
- To create another copy of the report with a different format, select a formatting option from the **Select a Format** drop-down box, then click **Export**.
- Click the printer icon to initiate the printing of the current report.

For each file imported within the time period that you specify, the File Import Summary Report lists the following fields:

### **File Import ID**

This is a file ID assigned by the system in accession order. Each new file is assigned the next number, so a higher number indicates a more recent file. Files are listed from highest ID to lowest ID (within the specified timeframe for the report).

### **File Name**

The name composed of standard filename elements, including date

### **Start Date**

The start date of the file generation

### **End Date**

The end date of the file generation

### **File Type**

The type of file that was imported, for example: TransactionImport, StoreImport, ProductImport, and so on

### **Status**

Successful or Failed

**Details link** – Click this link in the File Import Summary Report to see the File Import Details Report for the associated file.

The File Import Details Report has two variations:

- If the file import failed, the File Import Details Report lists information in fields titled **Failure Reason** and **Suggested Action**.
- If the file import succeeded, the File Import Details Report lists file data and statistics, including the record type, the number of records in the file, and the number of records that were successfully transmitted.

**i Note:** In the case of certain files, a file import can partially succeed (some records are transmitted but others are not) and the file import is considered a success. In this case this report specifies the number of records successfully transmitted, and the number of records that failed to be transmitted.

## **Report: Signage**

## Web Signage Summary Report

For each web signage that you have defined, this report provides data about the usage of the signage, including information about how much it has been viewed and how much it has been used.

You can use this report to create a table of summary usage data about All signages, or just the Live, Paused or Saved signages. The table includes summary data for each signage, and totals for all signage data listed in the table.

### Notes on web signage data listed in rows

The data table lists data for each web signage defined in your system. Each web signage is listed in a separate row. To see details about a particular piece of web signage, double-click the name of the signage. The name is set up as a link; clicking opens the Web Signage Detail Report for that signage.

Data totals are displayed for all of the web signage in the current table.

### Notes on column headings and how values in columns are derived

#### Views

The number of separate views of a signage (or the total of all views of the listed signage).

#### Customers

The number of unique (different) customers who clicked the signage.

#### Views Per Customer

The number of separate views of a signage per customer. This is the average number of views per customer.

#### Total Clicks

The total number of clicks on the selected signage.

#### Total Unique Clicks

The total number of customers who clicked on this signage.

#### Unique Click Through Rate

A ratio of the customers who clicked on the signage to the number of customers who viewed the signage.

When you specify the parameters of this report, you can filter your view of the available signage by selecting just the Live, Paused or Saved signages from the drop-down selector box. You might want to compare the usage of Live signage against the signage that has been put into Paused or Saved mode because, for example, such signage represents seasonal or otherwise temporary signage that has been retired or taken out of use.

## Web Signage Detailed Report

For a selected piece of web signage and a selected period of time, this report provides data about the usage of the signage.

To use this report, you select one piece of web signage from a drop-down list of all signages defined in your system. Then you specify the time period to be covered by the report.

### Notes on web signage data listed in rows

The rows list usage of the selected signage by registered customers, by unregistered customers, and by all (total) customers. Each row includes information about how much the signage has been viewed and how much it has been used (clicked on) during the specified time period.

### Notes on column headings and how values in columns are derived

#### Views

The number of separate views of a signage (or the total of all views of the selected signage)

#### Customers

The number of unique (different) customers who clicked the signage

#### Views Per Customer

The number of separate views of a signage per customer. This is the average number of views per customer

#### Total Clicks

The total number of clicks on the selected signage

### **Total Unique Clicks**

The total number of customers who clicked this signage

### **Unique Click Through Rate**

A ratio of the customers who clicked the signage to the number of customers who viewed the signage.

## **Report: Activity**

An activity is a task that can be completed on a web site. The successful completion of an activity can be monitored over the web, and a customer's completion of an activity can be used to qualify that customer for an offer.

## **Activity Analysis Report**

This report indicates the performance of current and past activities and provides data. For each activity, two rows are displayed: one for customers who performed the activity, and one for customers who did not.

The data table shows, for each row corresponding to an activity, the following data:

### **Performed**

Y (Yes) or N (No). N refers to "Not Performed", which is used to refer to customers who did not perform a specified activity. Be aware that not performing an activity can be selected and used as an activity-based criterion.

### **Activity Count**

The number of times this activity is completed over a period of time. Be aware that some activities can be completed multiple times by the same customer. Others can be completed just once by each customer. The activity count is based on instances of the completion of the activity. Multiple completions are counted multiple times.

### **Customer Count**

The number of customers who are counted as satisfying the activity-based criterion during a time period, as defined by your report set-up parameters

## Monetary Units Sales

The total sales over the specified time period to the specified customers.

## Unit Sales

The number of separate units sold over a specified time period to the specified customers.

## Txn

The transactions over the specified time period performed by the specified customers.

**i Note:** Click the linked name of the activity to open the Activity Time Series Report and see detailed data for the activity. You have to define all parameters for this more detailed report.

# Activity Time Series Report

This report shows the spending of customers who performed (or did not perform) a specified activity over a specified period of time. The report includes both a line graph and a data table.

You can specify data in both the activity and spending categories.

With respect to the activity, select the following:

- The customer activity to be used as a test criteria
- Whether the test checks for performance or non-performance of the selected activity
- The report timeframe for the activity data to be covered in this report

With respect to the spending, select the following:

- The time increment that each row of the report data addresses
- The report timeframe
- Spending data to be covered in this report

- i Note:** You can specify different time periods for an activity and for spending. Always check both specified periods to make sure that you get precisely the results that you need to compare.

The line graph shows, for each incremental period, two types of data:

- The activity count, that is, the number of times the activity was completed. Specifying "not performed" during the report set up does not change this count.
- The customer count, that is, the number of customers who are counted as satisfying the activity-based criterion during a time period, those who did or did not perform a specific activity, as defined by your report set-up parameters. Specifying "not performed" during the report set up can completely change this count.

The data table shows the following data, for each row corresponding to an incremental period:

#### **<Time period> Ending**

The end date of your selected incremental reporting period: daily, weekly, monthly, quarterly, annually

#### **Activity Count**

The number of times this activity is completed over a period of time. Be aware that some activities can reasonably be completed multiple times by the same customer, and others are completed just once by each customer. The activity count is based on the completion of the activity. Specifying "not performed" during the report set up always changes this count to zero (0).

#### **Customer Count**

The number of customers who are counted as satisfying the activity-based criterion during a time period, as defined by your report set-up parameters.

#### **Monetary Units Sales**

The total sales over the specified time period to the specified customers, as defined by your report set-up parameters

#### **Unit Sales**

The number of separate units sold over a specified time period to the specified customers, as defined by your report set-up parameters

**Txn**

The transactions over the specified time period performed by the specified customers, as defined by your report set-up parameters

## Report: CSR Activity

### CSR Activity Breakdown Report

For a specified period (the report timeframe), this report provides a data table that lists each customer service activity for one selected CSR or for all CSRs, along with associated activity-related data.

If you have the privileges to see this report, for example, if you are a CSR administrator, select the user (CSR) whose data you want to see, or you can select **All** to see data for all CSRs. Click the down arrow at the right of the **Users** drop-down selection field to see the comprehensive list of CSR users from which you can select.

You can also set the timeframe for the report, the period of time that the report data covers.

The data table shows, for each activity completed by a CSR, the following data:

**Date/Time**

The date and time of the CSR activity.

**CSR Name**

The name of the CSR. Note that the names of all who perform a CSR activity are recorded, regardless of their assigned role or privileges.

**Customer First Name**

The first name of the customer whose record is affected by an activity, based on the record data (can be abbreviated or absent).

### **Customer Last Name**

The last name of the customer whose record is affected by an activity, based on the record data. (can be abbreviated or absent.)

### **Customer Email**

The email of the customer whose record is affected by an activity, based on the record data.

### **Activity ID**

The unique, CRMS-assigned identification number for the activity.

### **Value**

For some -- not all -- activity actions (see next field description), a value is added. For example:

- For Deactivate account, the Value column displays an I.
- For Reactivate account, the Value column displays an A.
- For Added customer points, the Value column displays the number of points.

### **Activity Action Note**

The name of the activity performed by the CSR. Here is a partial list (samples) of possible CSR activities:

- Deactivate account
- Reactivate account
- Added customer points
- Updated customer info
- Added loyalty card
- Enrolled Customer
- Unenrolled Customer
- Added customer points
- Created customer info

# Point Expiration

## Point Expiration Forecast Report

Report information and format:

### Column Headings

- Customer Email Address
- Point Balance : as the end date selected.
- Potential Points Burned : number of points burned (redeemed or spent) during the conversion process. Based on current point balance and current auto-conversion rule or reward catalog items, these are the points that are converted into rewards.
- Potential Award Value : award value as aggregate for the customer. If the monetary units value is not defined, show N/A.
- Points to be Expired : number of points left after the conversion takes place. Any remaining points that cannot be automatically converted into rewards are expired on the set expiration date.

### Row Headings

- Customers
- Total (for all columns except Email Address)

### Sort Order

- Based on point balance (high to low)

### Notes on Totals:

- Totals are aggregate numbers.
- Point balance is the aggregate point outstanding for the retails as of the end date.
- Points burned is how many points were burned for all customers.
- Total award value: aggregate for all customers. If it is not defined for all customers,

display N/A.

- Point balance after burning points: how many points are left and are burned out or lost for all customers.

### Sample Contents:

Customer Email Address	Point Balance	Potential Points Burned	Potential Award value	Points to be expired/Remaining Points
mike@example.com	6000	4000	NA	2000
ll@example.com	1000	0	10 monetary spend	1000
john@example.com	10000	9000	100 monetary spend	1000
<b>Total</b>	<b>17000</b>	<b>13000</b>	<b>NA</b>	<b>4000</b>

## Reports: Ad-hoc Reporting

You can now leverage the power of Jaspersoft reporting in ad-hoc reporting to create robust static and interactive reports using the advanced data analysis capabilities of Jaspersoft.

## Configuring Ad-hoc Reporting

## Creating Users for Ad-hoc Reporting

### Procedure

1. Navigate to the **Admin > CRMS Users** page.
2. Select the **User Type**.
3. Click **Add**.
4. Select **Allow Ad-hoc Reporting** in the Create New User page.
5. Click **Done**.

## Editing Users for Ad-hoc Reporting

### Procedure

1. Navigate to the **Admin > CRMS Users** page.
2. Select the user you want to edit.
3. Click **Edit**.
4. Select **Allow Ad-hoc Reporting** in the Edit User page.
5. Click **Done**.

## Accessing Ad-hoc Reporting

After you have created users with Ad-hoc reporting capabilities, follow these steps to access Ad-hoc reporting:

### Procedure

1. Navigate to the **Reports > Ad-hoc Reports** page.
2. This opens the Ad-hoc Reporting user interface.

Contact your customer loyalty manager about enabling Ad-hoc reporting functionality.

# Admin

---

This section provides information about CRMS administration.

## Topics:

- [Main Settings](#)
- [CRMS Users](#)
- [Partners](#)
- [Announcement](#)
- [Custom Attributes](#)
- [Custom Entities](#)
- [Customers](#)
- [Generic Events](#)
- [Product Taxonomy](#)
- [Tiers](#)

## Main Settings

CRMS administrators can use the **Admin > Main Settings** page to define, modify, and review several categories of high-level information about their Loyalty program, including account information, member point limit, point configuration, list import, and alert settings.

**i Note:** If you are not a CRMS administrator, some or all of the information categories are not available in the Main Settings page.

# Features and Fields

The options and information of the Main Settings page are listed by section.

## Manage Account Information Section

**Your Information** lists the current user name, email address and company. Click **Your Information** to open the Edit Your Information page. Use it to edit the name, email address, and the associated password.

## Configuration Management Section

You can use **Member Point Limit** to create an offer that awards either a fixed point award, or a number of points based on the member's Point Award Limit, whichever is the lowest. You must define the member's Point Award Limit in the transaction import file that you exchange with Reward.

You can use **Points Configuration** to configure the following:

- You can use **Point Vesting Configuration** to define an amount of time between when a member earns a Point award, and when those points become available for them to redeem ("vested"). If point vesting is enabled, the members are able to view their available points balance, as well as their pending points balance, in their My Account pages.
- **Point Reset Configuration** controls what happens to a customer's points when their account is deactivated, or they are unenrolled.

**List Import** defines how list records are saved into the system.

You can use **Alerts** (also known as Customer and Aggregate Threshold Alerts) to define thresholds for a variety of metrics. When a threshold is exceeded, an alert email is sent to an address entered in this section.

- **Send alerts to email address(es)** - Enter one or more comma-separated email addresses in this field. The best practice is to include the email address of each person responsible for reacting to a checked threshold alert.
- **Customer Threshold Alerts**

The following alerts are triggered when a customer's behavior exceeds entered values:

- **Single transaction monetary units** : triggered when the monetary unit amount in a single transaction is greater than this setting.

- Single transaction points awarded : with bonuses and accelerations, a single transaction can generate a large point total.
  - Single transaction items purchased : you receive an alert when the number of items per transaction exceeds the specified amount.
  - Daily total monetary units : monetary Units spent between 3 A.M. yesterday and 3 A.M. today Pacific time.
  - Daily total points : points earned in a day, including bonuses and accelerations, but excluding CSR adjustments.
  - Daily total items : a single customer purchases more individual SKUs in a day than this setting.
  - Rolling 7 day period total monetary units : a single customer spends more than this setting in the prior 7 day period.
  - Rolling 7 day period total points : earns more points than this setting in the prior 7 day period.
  - Rolling 7 day period total line items : triggered if, in the last 7 days, a purchase of a number of individual SKUs exceeds the entered amount.
- **Aggregate Threshold Alerts**

The following aggregate threshold alerts are triggered when overall activity for a day exceeds the chosen value:

    - Daily total monetary units : the sum of all monetary units spent between 3 A.M. yesterday and 3 A.M. today Pacific time.
    - Daily total points awarded: the sum of all points awarded between 3 A.M. yesterday and 3 A.M. today Pacific time.
  - **Reward Code Inventory Threshold Alert** sets a threshold for when to notify that the reward code inventory is running low. Set the threshold as a percentage of the available inventory.

## Configuration: List Import

Use the List Import Settings page, which is accessible through the **Admin > Main Settings** page, to define settings that determine how list records are saved into CRMS.

### Features and Fields

## Allow updates

**i Note:** This feature is not supported at the current time, and changing its settings does not have any effect on existing records or data.

This control offers two options: existing customer records either will or will not be updated when importing a list. **Will not** is the default setting.

This control only applies to existing customers.

Reward strongly advises that you leave this option set to "**WILL NOT**" at all times. Contact client services before changing this setting, or to resolve any related questions.

### Import and create new record as:

This control offers two options for importing new customers:

#### Unregistered Customers

If importing as unregistered customers, all new email addresses are added as unregistered customers. If an imported email address already exists in the database, no existing customer record is modified. This means that if an existing customer is currently a member of the loyalty program (registered), and if that existing customer is imported, that customer stays registered.

#### Registered Customers

If importing as registered customers, all new email addresses are added as registered members. Note that these new members are treated immediately as such. For example, CRMS sends any enabled Welcome trigger emails to them. If an imported email address already exists in the database, no existing customer record is modified.

To navigate to the page, click **Admin > Main Settings**. Then, in the **Configuration Management** section, click **List Import**. The List Import Settings page opens. Each setting uses a drop-down menu as the control.

1. Do not change the **Allow Updates** default setting unless you have been directed to do so by Reward Client Services.
2. To reset the **Import and create new record as** setting, select the correct value from the drop-down menu.
3. To reset the **Email Opt-in** setting, select the correct value from the drop-down menu.

## List Import: Email Opt-In

This control offers two options: Opted-In or Opted-Out. List email addresses can either be imported as Opted-In to receive email, or Opted Out. As most users import a list for the express purpose of sending emails, the default setting is Opted-In.



### Note:

- Changing the Email opt-in only applies to new customers. The email opt-in value for existing customers is not changed.
- Email addresses in Test lists receive test emails, regardless of the email opt-in status of customers in the test list.
- You are asked to confirm the "opt-in" status every time you import a list with set to "opted-in". Importing or updating the email addresses of customers who have not provided their expressed and verifiable permission to receive your email, and characterizing these addresses as "opted -in", could cause your company to violate anti-spam legislation such as the CAN-SPAM act, EU Opt-In Directive, or CASL, and so on.
- Email addresses are validated when they are imported. The fundamental email address requirements and validation rules cannot be changed.

## Configuration: Points

### Configuration: Member Point Limit

Use **Member Point Limit** to create an offer that awards either a fixed point award, or a number of points based on the member's Point Award Limit, whichever is the lowest. The member's Point Award Limit is set in the transaction import file that is exchanged with Reward. You can set limits, per customer, that determine what the customer gets versus what is earned, as well as when the customer can accept and redeem an offer.

Enabling the Member Point Limit makes a new award type available to you: "Points up to member point limit". Offers that use this award type either award (a) a fixed number of

points as specified at the time of , or (b) the number of points as specified by you, for this customer, in the transaction import file.

The loyalty program must be in place for this setting to be valid.

Follow these steps to enable the Member Point Limit:

**i Note:** Before you start this process, the member point limitation transaction data must be imported. Contact the Reward Data Integration team for details.

1. Select **Admin > Main Settings**.
2. In the Configuration Management section of the screen, click **Member Point Limit**.
3. Select the **Enable Member Point Limit** check box. If the Member Point Limit is disabled after having been enabled, all New, Saved, and/or Pending offers that use it get converted to regular fixed-offers.
4. Click **Done**.

## Points: Expiration Options

Point-expiration examples:

1. Points expire after a predefined period of time has elapsed since the accrual of the points. To do this, a date is set through back-end configuration for every year (or month or quarter) for all points to expire. To ensure that points for the period have been accumulated and counted correctly, the expiration usually occurs on the third day after the close of the period. For example, if the points for a given calendar year are supposed to expire at the end of the year, the expiration actually occurs on January 3 of the next year (three days after the year ends).
2. Points expire if the customer is no longer an "active" shopper, that is, if the customer has not made a purchase in a predefined number of months (or days), the customer's points expire.

Points expire if the customer has not used points over a predefined period after earning them. For example, if you define the period of time as one year, the points that a customer earns on January 2, 2013 expire on January 3, 2014.

## Configuration: Account Lockout

TIBCO Reward platform detects and prevents unauthorized access to your system by your Business Users (CRMS and reporting users) and/or Customer Accounts (microsite and mobile microsite users) using the Account Lockout feature.

Account lockout rules protect against unauthorized account access by locking out accounts when incorrect passwords are used. Use the Security Management page to 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.

## Setting Up Account Lockout Rules

### Procedure

1. Navigate to **Admin > Main Settings**.

This takes you to the Main Settings page.

2. Click **Account Lockout Rules** in the Security Management section of the Main Settings page.

This takes you to the Account Lockout Rules page.

3. Configure your Account Lockout Rules on this page, including:

- [Lockout Threshold](#)
- [Lockout Observation Window](#)
- [Lockout Duration](#)
- [Lockout Messages](#)

Following is the way you can set these account lockout parameters.

### Lockout Threshold

The first step in setting up Account Lockout Rules is to define your Account Lockout Threshold. The **Lockout Threshold** is the number of incorrect password attempts that causes the account to be locked out. Setting the **Lockout Threshold** to **Never** results in accounts never being locked out, even after multiple failed login attempts. The default number of failed login attempts that triggers an account lockout is four failed login attempts.

Use the **Lockout Threshold** pull-down list to set the Lockout Threshold by selecting the number of failed login attempts that cause the system to lock out an account.

After setting your Lockout Threshold, proceed to defining your other account lockout rules.

## Lockout Observation Window

The **Lockout Observation Window** is the period of time (in hours) to which the lockout threshold applies. The default Lockout Observation Window is one hour.

Use the **Lockout Observation Window** pull-down list to set the **Lockout Observation Window** by selecting the number of hours (1 to 24) to observe the login attempts.

## Lockout Duration

The **Lockout Duration** is the period of time (in hours) that the account is locked out after meeting the lockout threshold. The default lockout duration is 24 hours or until the account is unlocked manually.

Use the **Lockout Duration** pull-down list to set the lockout duration by selecting the number of hours (1 to 24) to lockout the account.

You can also set the account-lockout duration based on the task of manually unlocking the account rather than unlocking the account after a time period has elapsed: Do this by clicking the **Until Manually Unlocked** radio button. (Please refer to [Account Lockout Rules: Unlocking Accounts for more information.](#))

## Lockout Messages

You must provide Account Lockout messages for business users and customer accounts as part of your account lockout configuration. The default lockout message for business users is “Oops! Your account is locked. Please contact an administrator.” The default lockout message for customer accounts is “Oops! Your account is locked. Please contact customer support.”

You can modify the account lockout messages based on your specific account lockout rules. For example, if you set the **Lockout Duration** to one hour for business users, you can update the message to say “Your account is locked. Please wait one hour before attempting to login again. If you need immediate access, please contact an administrator.”

You can modify account lockout messages by entering new message text in the **Business User Account Lockout Message** and **Customer Account Lockout Message** text boxes.

## Account Lockout Rules: Unlocking Accounts

When one of your business user's accounts has been locked out, they can contact one of your loyalty program administrators to have their account unlocked.

When one of your customer's accounts has been locked out, they can contact one of your customer service representatives to have their account unlocked.

### Unlocking Accounts: Business Users

Use CRMS to unlock business user accounts.

#### Procedure

1. Navigate to **Admin > CRMS Users**.  
This takes you to the CRMS Users page.
2. Locate the locked-out user in the list of CRMS Users. Locked-out users have their **Status** displayed as "Locked".
3. Click **Edit** to the right of the business user's status.  
This opens the Edit CRMS User page. For locked accounts, there is an **Unlock Account** button.
4. Click **Unlock Account**. This unlocks the business user account.

### Unlocking Accounts: Customer Accounts

Use CSR to unlock Customer Accounts.

#### Procedure

1. Click **Support**.  
This takes you to the customer management tool, which is also known as CSR.
2. Search for the locked-out customer account by entering customer-specific criteria

and then clicking **Search**.

3. Click the arrow to the left of the customer's first name.
4. Click **View Details**.

The **Status** for locked-out customers, who are loyalty program members, is displayed as "Enrolled Member – Account Locked".

5. Click **Change Status**.

This opens a dialog displaying the customer's account status.

6. Click **Unlock Account**.

7. Click **next**, and then click **Confirm**. This unlocks the customer account.

## CRMS Users

This section explains user administration.

### User: Roles

CRMS user roles include:

- **Administrators** have "Super User" privileges. They can create new users and assign privileges. They are also authorized to create, publish, approve, and schedule offers and loyalty programs.
- **Publishers** can only schedule offers. They cannot create users.
- **Store Managers** can create offers for their store, but the offers must be approved by an Administrator or Publisher. (Contact Reward's Client Services before attempting to assign this role to a CRMS user.)
- **Category Managers** can create offers in their product category, for any store, but the offers must be approved by an Administrator or Publisher. Contact Reward's Client Services before attempting to assign this role to a CRMS user.
- **CSR Admins** can access certain features under CRMS **Reports**, **Support**, and **Admin** menus. For example, under the **Reports** menu, CSR Admins can only access the CSR Activity Report. A CSR Administrator can only add CSR Users.

- **CSR Users** can only access certain features under the CRMS **Support** menu.
- **Clienteling Users** can access the Clienteling User Interface, which is used to look up and/or enroll customers in the Loyalty Program. Refer to [Clienteling](#) for more information. Clienteling users do not have access to CRMS or CSR.
  - For clients who have implemented clienteling, the following user types can also access the clienteling interface:
    - Administrator
    - Publisher
    - Store Manager
    - Category Manager
    - CSR Admin
    - CSR User
  - The following user types do not have access to the clienteling interface:
    - API User
    - Advanced Reporting User
    - Existing Customer User Types
- **API Users** are API specialists, who cannot access CRMS.

To add or manage Advanced Reporting Users (also known as Ad Hoc Reporting users), navigate to the **Admin > Advanced Reporting Users** page.

## User: Permissions

This table is a quick reference for User Types and their permissions.

		System Administrator	Publisher	Store Manager	Category Manager	CSR Admin	CSR User	API User	Clienteling User
<b>Promote</b>	Create Offers	X	X	X	X	-	-	-	-

	Approve Offers	X	-	-	-	-	-	-	-
	View Offers	X	X	X	X	-	-	-	-
	Delete Offers	X	-	-	-	-	-	-	-
		<b>System Admin</b>	<b>Publisher</b>	<b>Store Manager</b>	<b>Category Manager</b>	<b>CSR Admin</b>	<b>CSR User</b>	<b>API User</b>	<b>Clienteling User</b>
<b>Target</b>	Customer Profiles	X	X	X	X	-	-	-	-
	Basket Profiles	X	X	X	X	-	-	-	-
	Lists	X	X	X	X	-	-	-	-
	Postal Codes	X	X	X	X	-	-	-	-
	Custom Questions	X	X	X	X	-	-	-	-
	Mobile Geolocations	X	X	X	X	-	-	-	-
		<b>System Admin</b>	<b>Publisher</b>	<b>Store Manager</b>	<b>Category Manager</b>	<b>CSR Admin</b>	<b>CSR User</b>	<b>API User</b>	<b>Clienteling User</b>
<b>Email</b>	Create	X	X	X	X	-	-	-	-

Communi cati ons									
Approve Communi cati ons	X	-	-	-	-	-	-	-	-
View Communi cati ons	X	X	X	X	-	-	-	-	-
Create Campaig ns	X	X	X	X	-	-	-	-	-
Approve Campaig ns	X	-	-	-	-	-	-	-	-
View Campaig ns	X	X	X	X	-	-	-	-	-
Trigger Events	X	-	-	-	-	-	-	-	-
Stationer y	X	-	-	-	-	-	-	-	-
Test & Seed Lists	X	X	X	X	-	-	-	-	-
Settings	X	X	X	X	-	-	-	-	-
	<b>Syste m Admi n</b>	<b>Publis her</b>	<b>Store Manag er</b>	<b>Categ ory Manag er</b>	<b>CSR Admin</b>	<b>CSR Use r</b>	<b>API Use r</b>	<b>Clientel ing User</b>	

<b>Signage</b>	Signage	X	X	X	X	-	-	-	-
	Domains	X	-	-	-	-	-	-	-
		<b>System Admin</b>	<b>Publisher</b>	<b>Store Manager</b>	<b>Category Manager</b>	<b>CSR Admin</b>	<b>CSR User</b>	<b>API User</b>	<b>Clienteling User</b>
<b>Content</b>	Content Items	X	X	X	X	-	-	-	-
	Content Rule Sets	X	X	X	X	-	-	-	-
		<b>System Admin</b>	<b>Publisher</b>	<b>Store Manager</b>	<b>Category Manager</b>	<b>CSR Admin</b>	<b>CSR User</b>	<b>API User</b>	<b>Clienteling User</b>
<b>Rewards</b>	Reward Codes	X	X	X	X	-	-	-	-
	Reward Items	X	X	X	X	-	-	-	-
	Reward Catalogs	X	X	X	X	-	-	-	-
		<b>System Admin</b>	<b>Publisher</b>	<b>Store Manager</b>	<b>Category Manager</b>	<b>CSR Admin</b>	<b>CSR User</b>	<b>API User</b>	<b>Clienteling User</b>
<b>Reports</b>	Customer	X	X	X	X	-	-	-	-

	Offer	X	X	X	X	-	-	-	-
	Email	X	X	X	X	-	-	-	-
	Specialized	X	X	X	X	X (CSR activity report only)	-	-	-
	Point Expiration	X	X	X	X	-	-	-	-
		<b>System Admin</b>	<b>Publisher</b>	<b>Store Manager</b>	<b>Category Manager</b>	<b>CSR Admin</b>	<b>CSR User</b>	<b>API User</b>	<b>Clienteling User</b>
<b>Admin</b>	Main Settings	X	-	-	-	-	-	-	-
	CRMS Users	X	-	-	-	X (view/edit CSR users only)	-	-	-
	Partners	X	-	-	-	-	-	-	-
	Announcement	X	-	-	-	-	-	-	-

	Activities	X	-	-	-	-	-	-	-
	Custom Attributes	X	-	-	-	-	-	-	-
	Custom Entities	X	-	-	-	-	-	-	-
	Generic Events	X	-	-	-	-	-	-	-
	Points	X	-	-	-	-	-	-	-
	Reminders	X	-	-	-	-	-	-	-
	Product Taxonomy	X	-	-	-	-	-	-	-
	Tiers	X	-	-	-	-	-	-	-
		<b>System Admin</b>	<b>Publisher</b>	<b>Store Manager</b>	<b>Category Manager</b>	<b>CSR Admin</b>	<b>CSR User</b>	<b>API User</b>	<b>Clienteling User</b>
<b>Loyalty</b>	Refer A Friend	X	-	-	-	-	-	-	-
		<b>System Admin</b>	<b>Publisher</b>	<b>Store Manager</b>	<b>Category Manager</b>	<b>CSR Admin</b>	<b>CSR User</b>	<b>API User</b>	<b>Clienteling User</b>
<b>Support/CSR</b>	Search	X	X	X	X	X	X	X	X

Enroll Customers	X	X	X	X	X	X	X	X	X
Edit Info	X	X	X	X	X	X	X	-	-
Email Preferences	X	X	X	X	X	X	X	-	-
Adjust Points	X	X	X	X	X	X	X	-	-
Reset Password	X	X	X	X	X	X	X	-	-
Merge	X	X	X	X	X	X	X	-	-
Change Status	X	X	X	X	X	X	X	-	-
Manage Cards	X	X	X	X	X	X	X	-	-
Customer View (microsite)	X	X	X	X	X	X	X	-	-

## Creating User

Only Administrators can add new users to the system, with one exception: a CSR Administrator can add CSR Users.

### Procedure

1. Navigate to **Admin > CRMS Users**.

2. Select User Type (which are described in [User: Roles](#)).
3. Click **Add**.

The Create CRMS User page is displayed.

4. Fill in the following:

**First Name**

This is the first name that is used to identify and greet this CRMS user in CRMS.

**Last Name**

This is the last name that is used to identify and greet this CRMS user in CRMS.

**Email Address**

This must be a valid email address. It is the email address that CRMS typically uses to send confirmation email to users. Some CRMS features automatically send email information to confirm that a task has been completed (for example, files, reports). In such cases, the email address specified in the feature is used.

**Password**

Create a unique password.

**Re-enter Password**

Confirm the new password.

**Send account info to user**

As a general rule, you want to select the check box and send any new or changed account information to the user, as a confirmation.

5. Click **Done**.

** Note:**

- A password can only be changed by an Administrator. A CSR Administrator is limited to changing the passwords of CSR Users.
- All users can request a new password by clicking **Forgot your Password?** on the CRMS login screen.

When new users are created, if adequate information is provided in the User Creation page, an email is sent to them with a password for accessing their account. Until they log into the system, their account is marked as **In Progress**. After they have logged in, their account is then marked **Active**. Administrators can use the **Last Log In** column to determine if an account is in use any longer. Accounts not in use should be deleted.

## Creating Users Through File Import

Create users through file import when you need to create large numbers of users (for example, upon initial set up of your Loyalty Program). Note that Import Lists must be ASCII text files. Other formats can cause imports to fail.

### Procedure

1. Navigate to **Admin > CRMS Users**.
2. Select **Add > Users via file import**.  
The Import Users page is displayed.
3. Browse to find the User file.
4. Click **Upload** (there is an “upload successful” or “upload failed” message).
5. Click **Done**.

The imported users are displayed in the list of CRMS users.

## Creating Users Through File Import: Associate Stores

When creating users through file import, there are two user types you can associate with specific stores: Store Managers and Clienteling Users.

### Procedure

1. Navigate to **Admin > CRMS Users**.
2. Select **Add > Users via file import**.  
The Import Users page is displayed.
3. Click **View Sample File**.

This opens a `CRMSUsersSample.csv` file. Use this file as a template for your user import files.

4. In the `CRMSUsersSample.csv` file template, the fifth column defines the user type. Enter `StoreManager` or `Clienteling User` in this column.
5. In the `CRMSUsersSample.csv` file template, the seventh column defines the stores associated with the Store Manager or Clienteling User. Enter the `RetailerStoreID` in this column.

**Note:** Use the pipe character (|) between store IDs when associating more than one store to a Store Manager or Clienteling User.

6. Save your updated `CRMSUsersSample.csv` file.
7. Return to the Import Users page, and click **Browse** to find the file from step-6.
8. Click **Upload** (there is an “upload successful” or “upload failed” message).
9. In the list of CRMS Users, find one of the Store Managers or Clienteling Users you imported and click **Edit**.

The stores you associated with the Store Manager or Clienteling User in the seventh column of the imported file are displayed.

## Creating Users Through File Import: Associate Categories

When creating Category Managers through file import, you can associate the Category Manager with one or more categories.

### Procedure

1. Navigate to **Admin > CRMS Users**.
2. Select **Add > Users via file import**.

The Import Users page is displayed.

3. Click **View Sample File**.

This opens a `CRMSUsersSample.csv` file. Use this file as a template for your user import files.

4. In the `CRMSUsersSample.csv` file template, the fifth column defines the user type. Enter `CategoryManager` in this column.

5. In the CRMSUsersSample.csv file template, the eighth column defines the categories associated with the Category Manager. Enter the CategoryName in this column.

**i** **Note:** Use the pipe character (|) between category names when associating more than one category to a Category Manager.

6. Save your updated CRMSUsersSample.csv file.
7. Return to the Import Users page, and click **Browse** to find the file from step 6.
8. Click **Upload** (there is an “upload successful” or “upload failed” message).
9. In the list of CRMS Users, find one of the category managers you imported and click **Edit**.

The categories you associated with the category manager in the eighth column of the imported file are displayed.

## Resetting Password

### Procedure

1. Navigate to **Admin > Users**.
2. Click **Edit User** on the right side of the user.
3. Enter a unique password.
4. Reenter the password to confirm it.
5. Optionally, you can send these new credentials by selecting the **Send account info to user** check box.

## Partners

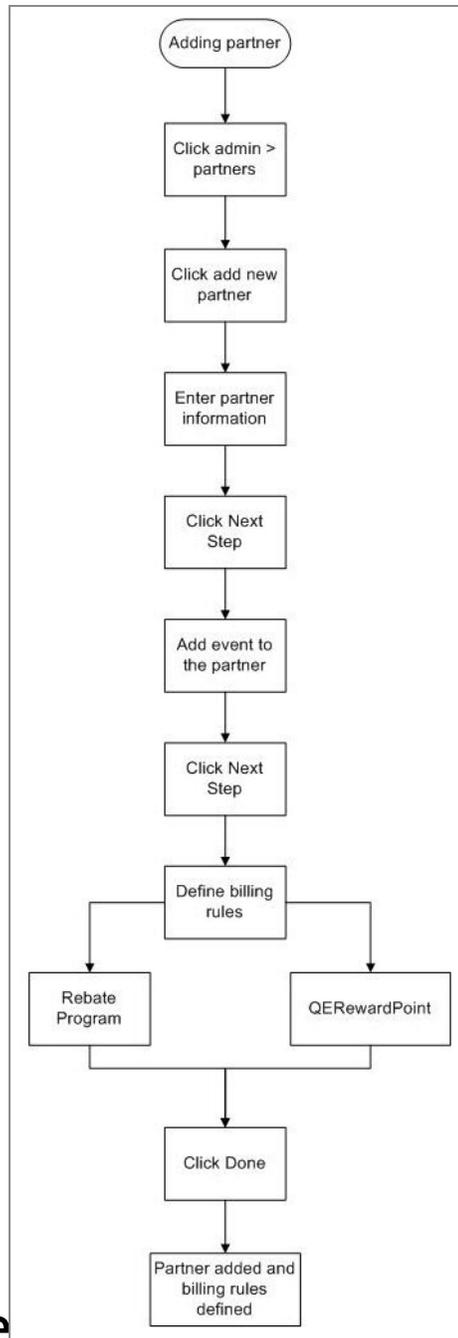
Partner programs can extend the ability to award and redeem points through a client's partner network. For example, an airline might partner with a rental car agency so that members of the airline's loyalty program can earn frequent flyer miles (or points) when program members rent a car with the partner rental car agency.

Partners can be set up in CRMS. You can define the generic events that are passed by the partners, how to reward the customer on each generic event, and even bill the partner for costs incurred with those partner rewards.

**i Note:** You must configure new partner data integration with TIBCO Reward Account Management before partner point transfers take effect.

Partner managers use CRMS to do the following:

- Create a new partner.
- Create new point types specifically for the partner.
- Identify the events for which the partner issues awards.
- Associate a billing rate to each point type (for example, base points = 0.03 monetary spend per point, bonus points = 0.02 monetary units per point) that the partner issues.



## Partner Offers: Create

In CRMS, you can define the generic events that are passed by the partners, how to reward the customer on each generic event, and even bill the partner for costs incurred with those partner rewards.

Here are the general steps to set up Partners:

- [Partner Offers: Step 1 - Creating Point Type](#)

- [Partner Offers: Step 2 - Creating Partner](#)
- [Partner Offers: Step 3 - Creating Offer](#)
- [Partner Offers: Step 4 - Targeting Offer](#)
- [Partner Offers: Step 5 - Launching Offer](#)

## Partner Offers: Step 1 - Creating Point Type

### Procedure

1. Select **Admin > Points > Add New Point Type**.  
The Create Point Type screen is displayed.
2. Enter point type name.
3. Click **Done**.
4. Continue to add point types that are applicable to the partner.

## Partner Offers: Step 2 - Creating Partner

### Procedure

1. Select **Admin > Partners > Add New Partner**.  
The Edit Partner screen is displayed.
2. Enter partner name.
3. Click **Next Step**.
4. Click **Add Event**.  
The Edit Award Event screen is displayed.
5. Enter the award event name.
6. Enter the description of the event. (The description is not visible to the end user.)
7. Select the **Use Event Value** check box.

**i** **Note: Use Event Value** must be selected if you want the partner to dictate how many points to award.

8. Click **Update**.

The **Reference Tag** for the partner is automatically populated.

9. Continue to add events that are applicable to the partner's needs.

10. Click **Next Step** after you have added events for the partner.

The Billing Rules screen is displayed.

In the Billing Rules screen, associate a billing rate to each point type (for example, base points = 0.03 monetary spend per point, bonus points = 0.02 monetary units per point) that the partner issues.

11. From the **Define billing rules for this point type** pulldown menu, select the Point Type you created in [Partner Offers: Step 1 - Creating Point Type](#).

12. Click **Add**.

This opens point range window.

13. Set the point cost.

14. Click **Add Range**.

15. Click **Update**.

## Partner Offers: Step 3 - Creating Offer

### Procedure

1. Select **Promote > Offers > Create New Offer**.

The Edit Offer Details screen is displayed.

2. Enter offer name.

3. Enter headline.

4. Enter description.

**i Note:** This description should match the **Internal Description** and/or **Description Line** from the partner worksheet from the initial data integration setup with Account Management.

5. Click **Next Step** to continue creating the offer.  
This displays the **Qualify & Award** step in the Edit Offer wizard.
6. Set the offer to award **Points Per Event Value** by selecting from the pull-down menu.
7. Select the point type you created in [Partner Offers: Step 1 - Creating Point Type](#) from the pull-down menu.
8. Enter the number of points to be awarded in the text box.
9. Check **Enable Custom Award Text**, which displays the **Enter Custom Award Value** text box.
10. Enter the text as it should be displayed on the customer's statement.  
Alternately, you can use custom award text to indicate the location where transactions were made by following these steps:
  - a. In the **Custom Award Value** text box, enter @(extdata).
  - b. Enter the Extended Event Data X-path as (/Location){1}.
11. Click **Select Event**.  
The Select Generic Events screen is displayed.
12. Select the generic event you created in [Partner Offers: Create](#).
13. Click **Next Step**, and proceed to targeting the offer.

## Partner Offers: Step 4 - Targeting Offer

### Procedure

1. Target your offer to **All Registered Customers** or select a profile from the pull-down menu.
2. Select **Yes** from the pull-down menu if anyone should be excluded from this offer. (The default setting is No.)

3. Click **Next Step** to continue creating the offer.  
This opens the **Presentation** step in the Edit Offer wizard.
4. Select the offer's **Display Rank** from the pull-down menu (if necessary).
5. Make sure to clear the **Display this offer in hosted microsite Offer Showcase** check box.
6. Click **Next Step** to continue creating the offer.  
This opens the **Schedule & Rules** step in the Edit Offer wizard.
7. Set the **Total Redemption Limit per Member** by entering a value in the text box.
8. Set the **Eligibility Dates**: The dates in which members can start and stop being eligible to qualify for this offer.
9. Set the **Qualification Period**: The length of time a member remains eligible to perform the qualification actions for this offer.
10. Enter store restrictions if there are any.
11. Click **Next Step** to continue creating the offer.  
This opens the **Summary & Preview** step in the Edit Offer wizard.
12. Review the elements of this offer: You can modify any of the offer elements by clicking **Edit** on that element row.
13. Click **Next Step** to save the offer.

## Partner Offers: Step 5 - Launching Offer

### Procedure

1. Click **Go to Offers**.  
This takes you to the Offers main page.
2. Update the status from **pending** to **approved** with the **Status** pull-down menu on the row of the offer.  
This automatically changes the offer status to **scheduled**.
3. Using the **Status** pull-down menu on the row of the offer, change the status from **scheduled** to **launch**.  
The partner offer becomes live.

# Announcement

Use the **Admin > Announcements** page to create messages for other CRMS users and to manage these messages.

Announcements are typically displayed in two complementary ways. The headline for each announcement is presented as a hyperlink that is displayed in a high-visibility location in CRMS Home page. If a CRMS user clicks this headline link, an announcement window is displayed, presenting the full text of the announcement message along with the headline.

Announcements created with the **Admin > Announcement** page are commonly used to inform CRMS users of upcoming merchandising opportunities, such as events and product specials, and to help coordinate marketing. Announcements can be used to convey any type of message to CRMS users.

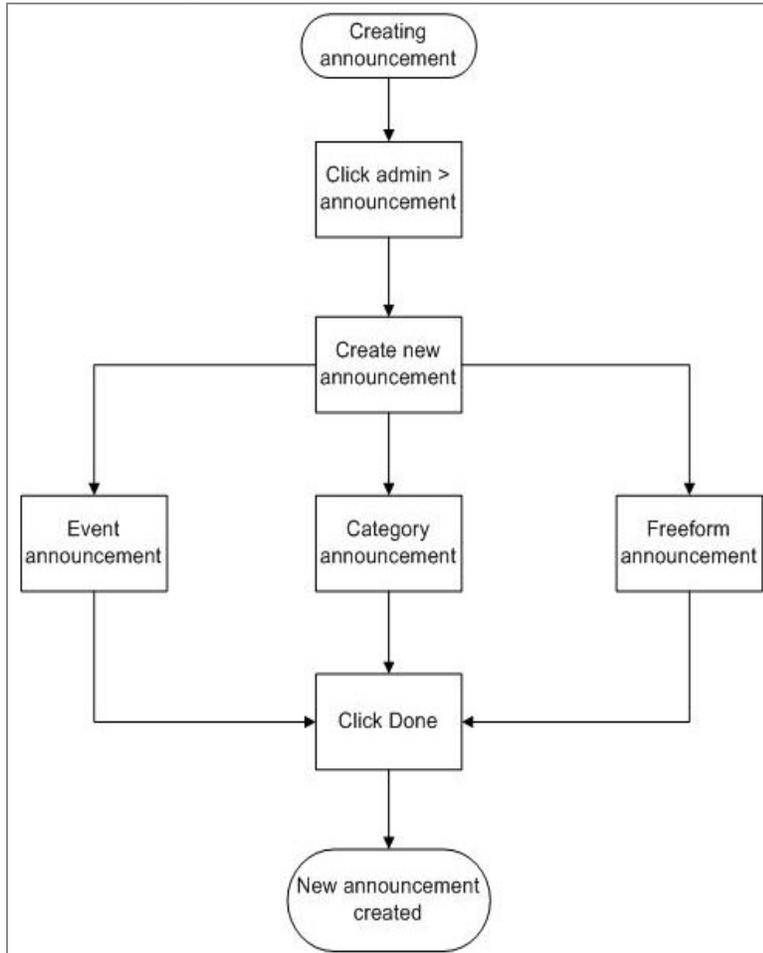
**i Note:** The announcements displayed in the announcement window are presented in memo format. They include the headline, CRMS name of the person who originally created the announcement, and the date when the announcement was originally created. The text follows.

Three **Create Announcement** options are presented:

- Event
- Category
- Freeform

**i Note:** At this time, there is no difference between the announcements that you produce by using a different **Create Announcement** option. You can use the announcement types as a means of classifying messages, but your selection does not impact the display.

## Creating Announcement



### Procedure

1. Navigate to **Admin > Announcement**.
2. Click the **Create a New Announcement** option called **Freeform**.

The Create New Freeform Announcement page opens.

3. Enter the text that you want to be displayed as **Headline**.

This text is displayed as a headline in the Announcements panel on the CRMS Home page (where it also serves as a hyperlink that opens the corresponding Announcement window), in the corresponding Announcement window along with the announcement text, and in the Headlines column in the Manage Announcements table.

4. Set the **Start Date** and **End Date**.

These set the range of dates when the announcement is displayed. If you select today's date as the start date, the announcement is displayed immediately.

**i Note:** The date that is displayed in the announcement window is the date when the announcement was originally saved. This cannot be changed by editing.

Enter the body text that you want to be displayed as the announcement's text message.

**i Note:** All text is displayed in one paragraph. Paragraph breaks and added line spaces are not included in the displayed message.

5. Click **Done**.

## Editing Announcement

### Procedure

1. Find the announcement you want to change in the Manage Announcements table, then click **Edit** in the same row. The Edit Announcement page is displayed, revealing the existing data for the selected announcement.
2. Change the headline, name, text or dates that you want to use for the announcement.

For details about modifying the individual fields on the page, refer to [Creating Announcement](#).

3. Click **Done**.

The modifications take effect immediately.

## Custom Attributes

Custom attributes are extensions to the customer or product record (additional data fields) that can be used to store non-standard data. You can use this data in profiles to target customers.

Custom attributes for customers can be used to dynamically insert customer attribute data in email communications by using reference tags.

Use custom attributes to search for products and groups of products according to the criteria important to you. You can use custom attributes to create product classifications other than those provided by formal product catalog categories and brands.

**i Note:**

- For customer targeting, customer custom attributes are available.
- For basket targeting, product custom attributes are available.

Custom attribute fields can be used in many different ways. Some suggestions and examples include:

- Set up a Product Custom Attribute titled "InventoryPushed" and use this attribute to search for items marked as Closeout, Overstocked, and so on when creating an offer. (Custom attribute for Products.)
- Collect and use customers' birthdays or anniversaries. (Custom attribute for Customers.)
- Store customer lifetime value (which you recalculate at update regularly) and target customers on the basis of this value. (Custom attribute for Customers.)
- Store external segment codes, such as PRIZM NE, for use in targeting customers. (Custom attribute for Customers.)
- Search for products by characteristics that are not encoded in their SKUs. Custom attributes can store characteristics such as a theme or a sub-brand or a quality that links a product to a market niche. Using product custom attributes, for example, you could characterize an item as Winter Collection, ChecksAndPlaids, and WrinkleResistant-Travel and search for it using any of these attributes. (Custom attribute for Products.)

Many of these applications of custom attributes require some level of professional services, but the expense is generally nominal.

Each custom attribute type is configured as one of the five specific data types: Lookup, Numeric, Text, FullDateTime, or DateTimeMonthDayOnly.

## Custom Attribute: Constraints

Follow these rules when using custom attributes:

- You can create up to ten custom attributes for each type.
- You cannot delete a custom attribute, after you have created it.
- After you have reached your maximum for a given attribute type, you cannot create any more of that type.
- If your company has implemented a non-standard design for its loyalty program, Reward can use some of the custom attribute slots to help manage your program.

In some cases, Reward can find creative solutions that get around these rules. Please contact Reward Client Services if you need to:

- Use more than your allotted number of custom attributes.
- Delete a custom attribute.
- Start using a custom attribute for a different purpose.

## Using Custom Attribute

Use custom attributes to define custom data fields in which you can store additional types of data about your customers and products.

### Procedure

1. Indicate whether you want to create a custom attribute for customers or for products.
2. Create your custom attribute by clicking one of the data types.  
See [Custom Attribute: Prerequisites](#) for more details on this process.
3. After the custom attribute is defined, modify the corresponding batch file appropriately:
  - Populate the custom attribute for customers by adding the attribute data to your shopper transaction file,

OR

- Add custom attribute for products by adding the attribute data to your product file. You can also use an API to provide or update custom attribute data in real time.
4. After populating the appropriate file with custom attribute values, use your customer custom attribute values when targeting offers and communications; or use your product custom attribute values when selecting or sorting products.

 **Note:**

- You can only target to customer custom attributes. You cannot target to product custom attributes.
- Be sure to work in coordination with your IT department and with Reward when implementing a new custom attribute. Your IT Department can help set up the Transaction file format or Product file format so that it conveys the new custom attribute data.
- If you use Transaction or Product files in Reward's standardized XML format, the change in the file format is relatively trivial. However, if the file is in flat file format, Reward needs to change its file transformation processes before files that include custom attribute data can be processed correctly.

## Custom Attribute: Reference Tag Use

You can define a custom attribute for a shopper in CRMS, and then add a custom attribute reference tag to an email communication so that the custom attribute field value for a specific shopper is added to an email communication. For example, you could define "Shopper Birthday" as a custom attribute for your shopper, collect birthday data for shoppers, and then insert a custom attribute tag into the email that would add a shopper's birthday data into each email.

Because you define custom attributes in CRMS (using the **Admin > Custom Attributes** page), custom attribute fields are not listed in the standard drop-down menus. To add a custom attribute tag, you must know the tag name (the name of the **Custom Attribute Definition Reference Tag** field that your organization defined and uses) to refer to the custom attribute. Usually this is something simple, like "shopperbirthday".

**i Note:** To see the reference tag name assigned to a custom attribute, open the **Admin > Custom Attributes** page, look in the **Manage Custom Attributes** table, and find the custom attribute you want to use. The table lists the reference tag name for custom attribute.

Custom attribute tags for shoppers are named according to the following convention:

@(shopper:customattrib:<reference\_tag\_name>)

where: the reference\_tag\_name maps to the **CustomAttributeDefinition ReferenceTag** field.

So, if a CRMS user creates a shopper custom attribute with ReferenceTag = “shopperbirthday”, the corresponding tag would be:

@(shopper:customattrib:shopperbirthday)

**i Note:**

- You can substitute "s" for shopper, so the following also works:
- @(s:customattrib:shopperbirthday)
- Make sure there are no spaces within the tag.
- Custom attributes that are supposed to display dates also include specific time data (hours and minutes). Regardless of the data entered, the displayed "date" fields have the following format: MM/DD/YYYY:HH/MM
- Custom attributes that are supposed to display integer numbers actually display numbers with two decimal digits, regardless of the data originally entered.

## Custom Attribute: List Page

The purpose of the Custom Attributes page is to provide access to custom attribute records and to help you create and work with custom attributes.

To open the Custom Attributes page, select **Admin > Custom Attributes**.

The Custom Attributes page includes the following features:

- The **Create > New Attribute** option, using which you can open a data entry page

and define data for any one of the five different types of custom attributes.

- The **Manage Custom Attributes** panel, which consists of:
  - The **Show** filter, using which you can sort custom attributes by their type, and by their application to either customer or product.
  - The **1 2 3** page control, using which you can navigate to any page in the current Manage Custom Attributes panel.
  - The complete list of custom attribute records.

The following custom attribute record fields are displayed:

### **ID**

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

### **Name**

The name of the custom attribute as defined in CRMS, and set up as a hyperlink to the custom attribute record. Click the custom attribute name to open the record, either to see or edit its details.

**i** **Note:** This name string text is the exact text string that must be used, character for character, in XML-formatted transaction files to identify this custom attribute. After a custom attribute has come into use, do not change its name in any way until you have consulted with Reward's Client Services department. Name changes can result in lost and/or corrupted data.

### **Applies to**

The associated data entity modified by the custom attribute: either products or customers.

### **Type**

The type of the associated custom attribute (one of the five possible types.)

### **Reference Tag**

The text string used to create the reference tag for this data field. Enter a text string that is unique with respect to other reference tags. You can use the specified reference tag

string in API calls for custom attribute data or to insert the custom attribute data into email or if the custom attribute is being displayed to the customer in the microsite.

**i Note:** After you have started to use the custom attribute, never change the name or reference tag, unless you have made special arrangements with Reward's Client Services department. If you change this text string after the associated custom attribute has come into use, any reference tags based on the former string fail to function properly.

### Last Modified

The date when this custom attribute record data was most recently changed. This is the field used by default to sort the custom attribute records. When you open the Custom Attributes page, the most recently updated custom attribute records are displayed first.

### Clone

Use it to clone the associated custom attribute record. The clone is assigned a slightly different name, usually called "Copy of <original name>". Because you can define a maximum of ten custom attributes of any given type, take care not to create custom attributes unless you are sure you use them.

Use the Custom Attributes page to:

- Find the name, reference tag, or type specification associated with a custom attribute.
- Open a custom attribute record to see specific details about the custom attribute that are maintained in that record.
- Create a custom attribute. (This includes updating lists of custom attribute values.)

## Custom Attribute: Prerequisites

Setting up the processing and transmission of the custom attribute data involves more effort and coordination of resources than simply defining the custom attribute in CRMS. If you want to add a custom attribute, contact your IT department for assistance. In some cases, this involves coordination with the Reward Account Management department.

If you are going to create profiles that use a custom attribute for targeting purpose, you might want to figure out how you define and use these profiles during your planning

phase: This helps you define some practical requirements for your custom attribute so that it better serves your specific purpose.

## Custom Attribute: Create

Create a custom attribute to add a new data field to customer records or to product records. You can then work with the data stored in this field to find, filter, and sort customers or products, respectively.

The customer custom attribute data extends the standard customer record data and you can use it to target customers and extend personalization by using data that is not available in the standard CRMS.

The product custom attribute data extends the standard product record data and you can use it to identify, select or sort products according to your custom (that is, non-standard for CRMS) product attributes.



**Note:** You can only target to customer custom attributes. You cannot target to product custom attributes.

## Creating Custom Attribute

### Procedure

1. Click **Admin > Custom Attributes**.
2. Select the category of data that you want to modify with a new custom attribute:
  - Customer
  - Product
  - Store
  - Reward Item
  - Redemption
  - Order Tender
  - Offer

3. Select one of the custom attribute type options listed after **Create New Attribute** (number, date/time, month/day, lookup, or text).

This creates a new custom attribute record of the selected type and displays the Edit Custom Attribute page.

When you create a custom attribute, you have to define it as one of the following types:

- Numeric
- Month/Day
- Date/Time
- Lookup Code
- Text Custom

 **Note:** You can only create ten custom attributes of one given type in CRMS.

## Custom Attribute: Creating Number

### Procedure

1. Navigate to the **Custom Attributes** tab by clicking **Admin > Custom Attributes**.
2. Create a new number custom attribute by clicking the **Number** link next to **Create a New Attribute**. Select **Product** or **Customer**, as appropriate.
3. Set the attribute parameters:
  - Give the attribute a name.
  - Give the attribute a reference tag.
  - Choose a display format:
    - **Number:** stores and displays whole numbers. (Note that the number 1 is expressed as 1.000.)
    - **Percentage:** stores and displays percentages with up to two decimal places.

- **Currency:** stores and displays the number as currency with the appropriate currency symbol and format.
  - Set an internal note, which is only displayed on this page.
4. Click **Save** at any time to save the current setting.
  5. Click **Done** to save your work and return to the **Custom Attributes** tab.

## Custom Attribute: Creating Month/Day

Use this attribute to store a month/day combination, without a year. This can be used in circumstances where collecting age is not desired, but birthday is desired.

### Procedure

1. Navigate to the **Custom Attributes** tab by selecting **Admin > Custom Attributes**.
2. Create a new Month/Day custom attribute by clicking the Month/Day link next to **Create a New Attribute**. Select **Product** or **Customer**, as appropriate.
3. Set the attribute parameters.
4. Give the attribute a name.
5. Set an internal note, which is only displayed on this page.
6. Click **Save** at any time to save the current setting.
7. Click **Done** to save your work and return to the **Custom Attributes** tab.

**i Note:**

- You can use a time-sensitive custom attribute, such as Month/Day or Date/Time, to target an offer to a particular set of customers, based on some time-oriented criteria. For example, if you capture the customer's birthday or anniversary as a Month/Day custom attribute, you can create a profile that selects customers who have a birthday that occurs on the current date, or that is some specified number of days in the future, or that occurs within some range of days in the future. For more information on the subject of creating a profile dimension that targets a custom attribute, refer to [Dimension: Custom Attributes](#).
- Unless you use a time-sensitive profile with a no-clip offer, a targeted customer can use the offer outside of the profile-driven timeframe when you present it.

## Custom Attribute: Creating Date/Time

If year is an element of the custom attribute, you must use the date/time attribute instead of month/day. For birthdays or anniversaries, use the month day type.

### Procedure

1. Navigate to the **Custom Attributes** tab by clicking **Admin > Custom Attributes**.
2. Create a new Month/Day custom attribute by clicking the Day/Time link next to **Create a New Attribute**. Select **Product** or **Customer**, as appropriate.
3. Set the attribute parameters.
  - Give the attribute a name.
  - Choose a display format, which defines how this attribute is represented within the targeting interface in profiles.
  - Set an internal note, which is only displayed on this page.
4. Click **Save** at any time to save the current setting.
5. Click **Done** to save your work and return to the **Custom Attributes** tab.

## Custom Attribute: Creating Lookup

Use Lookup custom attribute to target to discrete "codes" associated with your customer. To use Lookup Custom Attribute for Targeting, it must contain at least one code.

### Procedure

1. Navigate to the **Custom Attributes** tab by selecting **Admin > Custom Attributes**.
2. Create a new Lookup custom attribute by clicking the **Lookup** link next to **Create a New Attribute**. Select **Product** or **Customer**, as appropriate.
3. Give the attribute a name.
4. Enter reference tag, which is a unique identifier used when referencing the custom attribute.
5. Set an Internal Note, which is only displayed on this page.
6. Click **Save** at any time to save the current setting.

## Custom Attribute: Create Text

Use text custom attribute to work with text-field values, including relatively long strings (up to 1,000 characters). For example, you can use a text custom attribute so that a customer can record a message or a long description.

### Note:

- Text custom attributes are not searchable. This limits their value as customer profiling criteria. Custom attributes of the Lookup code type can include text, and are searchable, so Lookup codes represent a better alternative in many cases where an alphanumeric attribute value needs to be searched and sorted.
- Reward limits text custom attributes to 1000 characters per text field within the transaction files.
- Only the first 1,000 characters of the text custom attribute field are displayed in an email communication when the text of the attribute is inserted using the custom attribute tag. Additional characters are not displayed.

## Using a Text Custom Attribute

### Procedure

1. Navigate to the **Custom Attributes** tab by clicking **Admin > Custom Attributes**.
2. Create a new text custom attribute by clicking the **Text** link. Select **Product** or **Customer**, as appropriate.
3. Set the attribute parameters:
  - Give the attribute a name.
  - Choose a display format, which defines how this attribute is represented within the targeting interface in profiles.
  - Set an Internal Note, which is only displayed on this page.
4. Click **Save** at any time to save the current setting.
5. Click **Done** to save your work and return to the **Custom Attributes** tab.

## Text Custom Attribute Constraints

- As a general rule, special reserved XML characters, such as apostrophes, ampersands, and greater-than and less-than symbols (, &, ', %, <, >), cannot be used in text custom attributes.
  - To work around this constraint, these reserved characters can be “escaped” or contained within a CDATA section.
  - Here is an example of an escaped ampersand (&) character: &amp;
  - Special reserved XML characters such as apostrophes, ampersands, and greater-than, less-than symbols can pass without being escaped by turning off the XML validation for text that is contained with the CDATA brackets.
  - Your IT professionals can help you apply these techniques.
- When importing text custom attributes, the maximum length is 1,000 characters.
- If the text length is more than 2,000 characters, the transaction file import fails with the following reason: “Incorrect file format”
- When a reference tag for a text custom attribute is included in an email, the rendered

text that is inserted into the email includes only the first 1,000 characters.

- Input for text custom attributes in the user interface of the customer portal is 1,000 characters.
- Text custom attribute values exported as part of the shopper export only include the first 100 characters.
- A given text custom attribute should be populated either through the import or through CRMS user interface, but not both, because the last used method might overwrite the file.

## Custom Attribute: Add Customer Data

These are the prerequisites for data transfer if you are adding a customer custom attribute:

- If you use transaction batch files in XML format to convey data to Reward, your company must modify this file, adding the name of the custom attribute field to the XML schema.
- If you use transaction batch files in any non-XML format (flat file format) to convey data to Reward, your company (your IT department, in particular) must work with Reward to adjust the transform processes applied to the file so that the custom attribute field can be correctly processed.
- Make sure that your corresponding, in-house file creation processes add the custom attribute data to the transaction files.
- To use APIs to convey custom attribute data in real time, the API call must use the reference tag of the custom attribute.

### **Note:**

- Define the reference tag used in API calls when you define the custom attribute data in CRMS.
- If your company wants the custom attribute values included in shopper files or profile-list export files, be sure to request this from Reward.

## Custom Attribute: Add Product Data

These are the prerequisites for data transfer if you are adding a product custom attribute:

- If you use product batch files in XML format to convey product data to Reward, your company must modify this file, adding the name of the custom attribute field to the XML schema.
- If you use product batch files in any non-XML format (flat file format) to convey data to Reward, your company (your IT department, in particular) must work with Reward to adjust the transform processes applied to the file so that the custom attribute field can be correctly processed.
- Make sure that your corresponding, in-house file creation processes add the custom attribute data to the product files.
- To use APIs to convey custom attribute data in real time, the API call must use the reference tag of the custom attribute.

**i Note:**

- Define the reference tag used in API calls when you define the custom attribute data in CRMS.
- Always work in concert with your company's IT department to implement a custom attribute. A custom attribute must be fully supported by your transaction files or product files. If you use Loyalty API calls, it must also be supported by your API processes. Refer your IT department to the *Reward Integration Guide* for information on the required changes to your files.

## Custom Entities

Custom entities store client definable information. Custom entities differ from custom attributes in that a member can have multiple values stored for a given custom entity, and that each of these can have multiple custom entity attributes. For example, a customer can own multiple electronic devices: a cell phone, laptop computer, digital camera, and so on. That customer can create a custom entity called "Devices" that is capable of holding values for as many devices as are needed. In this example, the device entity might include fields such as type, brand, model, serial number, size, and so on. The "Devices" custom entity and field information can then be used for customer targeting.

# Creating Custom Entity

## Procedure

1. Select **Admin > Custom Entities** and then select **Create New > Customer Custom Entity**.

The Add A Customer Custom Entity screen is displayed.

2. Enter a name for the custom entity in the **Name** field. Each custom entity must have a unique name.
3. Enter a unique identifier for this custom entity in the **Reference Tag** field. Note that reference tags only use alphanumeric characters, underscore and period. The value should be similar to the name of this custom entity and easily understood.
4. Optionally, you can use the **Description** field to explain the custom entity to the customer. Description information is viewable by customers.
5. Also optionally, you can use the **Internal Note** field to record notes about this custom entity and how it is used. Internal note information is only displayed in CRMS and not to the customers.
6. Click **Save**.

Custom entities require a custom entity attribute. Add a custom entity attribute to the custom entity as described in [Custom Entity: Adding Attributes](#).

# Custom Entity: Adding Attributes

## Procedure

1. Click one of the **Create New Custom Entity Attribute** links from the Manage Custom Fields section of the screen:

### Number

Select to target numeric values associated with your customers.

### Date/time

Select to target date values associated with your customers. (Note that you can store and display but cannot target time.)

### Lookup

Select to target discrete "Lookup Codes" associated with your customer. Note that to target lookup codes, the following conditions must be satisfied:

- Lookup codes must be uploaded from a file on your computer.
- Uploads must be ASCII text files. Other formats might cause imports to fail.

### Text

Use text to describe the custom entity. (Note that a custom entity with the text custom entity attribute cannot be used for targeting.)

2. On the Custom Entity Attribute Properties screen, enter a name and reference tag.
3. In the **File** field, upload custom entity attribute lookup codes as described in [Custom Entity: Adding Attribute Lookup Codes](#).

## Custom Entity: Lookup Codes

Lookup codes are unique, alphanumeric codes that enable data mapping between a client and Reward. The lookup code is composed of the code (up to 45 alphanumeric characters) and the (optional) description of the code. You can use lookup codes to select from a list of descriptive values to build targeting criteria for custom entity attributes.

These are examples of gender lookup codes that can be imported into CRMS for targeting custom entity attributes:

Code	Description
M	male
F	female
D	decline to state

## Custom Entity: Adding Attribute Lookup Codes

### Procedure

1. Select **Admin > Custom Entities**.
2. Select a saved custom entity with an existing Field Entity Field Code of the lookup type.  
You can find the type of custom entity attributes in the Manage Custom Entity Attributes section of the Edit Customer Properties screen.
3. Download a sample lookup codes file by clicking **View Sample Data Format**.
4. Modify the lookup codes file so that it has the codes and descriptions you want.
5. Save the file.
6. Click **Browse** to find the lookup code file.

Click **Upload & Save**.

**i Note:**

- Lookup codes must be uploaded from a file on your computer.
- Lookup codes must be uploaded as ASCII text files. Other formats can cause imports to fail.

7. Click **Save** or **Done**.

## Custom Entity: Delete Attribute Lookup Codes

To delete a lookup code, click its **Delete** link in the **Codes** field. To delete all codes, click **Delete All Codes**.

If you delete a code, it is removed from the list of codes for that custom entity attribute only. If that code is targeted in a profile, it is also removed from there.

- i Note:** Targeting profiles are updated by Reward on a nightly basis, therefore your deletion might not affect the targeting behavior of the profile until after the update process has run. All profiles that formerly used the deleted codes must be edited to re-target them. Exercise great care when deleting lookup codes.

## Custom Entity: Importing Keys

Use import keys during data imports to link the data in the import to the correct custom entity attribute in CRMS. If two import keys are defined on a custom entity, the data in both fields is used as the unique identifier for the data in each row of the import file and for the custom entity attribute in CRMS.

### Procedure

1. Select **Admin > Custom Entities**.
2. Select a saved custom entity.
3. The three check boxes in the Manage Custom Entity Attributes section of the screen are the following:

#### Is Required

When selected, the custom entity attribute data is required and cannot be null. One or more custom entity attributes must be required. Required field values are used in imports to map data to the correct custom entity attributes.

#### Is Import Key

When selected, the data in the custom entity attribute is used as the unique identifier for data imports. It can only be selected if **Is Required** is selected.

#### Is Editable

When selected, the data in the custom entity attribute can be modified (by import or other means).

4. Select the **Is Required** check box.
5. Select the **Import Key** check box.

 **Note:** **Is Import Key** can only be selected if **Is Required** is selected.

6. After you have selected the custom entity attributes, click **Save** or **Done**.

## Editing Custom Entity

### Procedure

1. Select **Admin > Custom Entities**.
2. Select the custom entity attribute you want to edit.
3. Modify as you want. (You can add and/or edit custom entity attribute properties, including lookup codes.)
4. Click **Save** or **Done**.

## Publishing Custom Entity

After you have finished creating a custom entity that has at least one custom entity attribute and have clicked **Save** or **Done**, the **Publish** button is available at the top of the screen.

### Procedure

1. Select **Admin > Custom Entities**.
2. Click the custom entity you want to publish.
3. Click **Publish**.

 **Note:**

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

## Deleting Custom Entity

### Procedure

1. Click **Delete** on the row for the custom entity you want to delete.  
A dialog is displayed inquiring if you want to continue with the deletion.
2. Click **OK**.  
This deletes the custom entity.

**i Note:** Published custom entities cannot be deleted.

## Custom Entity: Targeting

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 can be created through the **Admin > Custom Entities** tab in CRMS user interface. (See [Creating Custom Entity](#) for information on how to create custom entities from CRMS user interface.)

- i Note:**
- You can target each custom entity once within a given customer profile.
  - When you select a custom entity, you need to pick one of the entity attributes for that custom entity and configure its values.
  - You can target each entity attribute once within a given customer profile.

## Custom Entity: Creating a Targeting Dimension

### Procedure

1. Open a customer profile by selecting **Target > Customer Profiles**.
2. Select an existing customer profile or create a new one.
3. After the Profile Description screen is displayed, select **Dimension > Custom Entities**.

**i Note:** Custom entities are not present in the list of targeting dimensions if there are no published custom entities.

4. After the Custom Entities screen opens, select the custom entity you want to target from the **Add a Custom Entity** pull-down menu and click **Add**.

**i Note:**

- You can only target a custom entity once within any given profile. After you have targeted a custom entity in a customer profile, the custom entity is removed from the **Add a Custom Entity** pull-down menu for that customer profile.
- When a custom entity is added, the custom entity name along with an **Add an Entity Attribute** pull-down menu for its associated attributes is displayed within a "condition block" on screen.
- Lookup type attributes are not displayed in the **Add an Entity Attribute** pull-down menu if they have no lookup codes defined during custom entity creation.

5. Select the entity attribute you want to target from the **Add an Entity Attribute** pull-down menu.

When you initially add an entity attribute, the custom entity is displayed in expanded mode so you can configure its entity attribute values.

6. After you have configured the entity attribute, click **Update** to save your changes for that attribute.

**i Note:**

- You can always edit a collapsed custom entity targeting dimension or its attributes by clicking its **Edit** button.
- Only one custom entity or entity attribute targeting dimension can be expanded and edited at a time.

Be sure to click **Update** on the condition block, or **Save**, before adding a new entity attribute. If you add a new entity attribute for a custom entity while editing one, you lose your work.

# Customers

This section explains managing customers.

## Customer: Manage

To access the Support and Customer Management, select Support from the CRMS menu. Enter search criteria to find a specific customer.

In addition to displaying customer information in several categories, the Customer Details page provides links to other customer pages where you can add and modify customer data.

Depending on the status of the current customer, a selection of the following links is made available:

### View Details

Click to view the customer's transactions, rewards, and award dates.

### Edit Info

Click to open the Customer Info page, which you can use to edit basic name and address field values.

### Email Prefs

Click to view the customer's email preferences. Use to opt-in or opt-out the customer from email communications.

### Adjust Points

Click to open the Adjust Points page. The adjustment number of points to be added or removed, Points Type, and the Reason text are required data. After supplying data, click **Next**. A confirmation message is displayed. If details are correct, click **Confirm**.

### Reset Password

Click to generate a new customer password and send it to the customer in a standardized email.

## Merge

Click to merge current customer account data into another (enrolled) customer account, or to merge another customer account into the current customer account (if it is for an enrolled customer). Refer to [Customer: Merge](#) for complete details.

## Change Status

Click to set the selected customer's membership status. You can do the following from this dialog:

- **Enroll (an existing customer):** this option changes the customer status from Merged or Active or Inactive to Enrolled. The customer is enrolled as a member of the loyalty program, and all related functions and options for enrolled customers are supported.
- **Un-enroll (an existing customer):** the support agent can unenroll (that is, close the account for) a customer who no longer wants to be enrolled in the loyalty program.

Unenrolling a customer has the following effects:

- The customer is deactivated (that is, status is changed from active to inactive), and is no longer a member of the loyalty program. In addition, if the email option was set to true, then it is changed to false.
- The customer no longer accrues points (if applicable) or receives offers.
- The customer cannot sign-in to **My Account** anymore.
- **Deactivate Account :** deactivation changes the customer status to Inactive, which effectively puts the customer on “hold”. The customer cannot log into his or her account and cannot accrue any points, although existing points remain on the account, which can be reactivated with no loss of data. Example: A client might want to use this option to temporarily disable accounts that are not in good standing (perhaps because a customer did not pay required dues). After the account is back in good standing, the client reactivates it. Reactivate is the only valid option for a deactivated customer.

## Manage Cards

Use this option to manually add card data (credit card, loyalty card, membership card, and so on) to be associated with an enrolled customer.

## Customer: Details Page

The purpose of the Customer Details page is to display information about an individual customer and to help you change data in this customer's account.

The Customer Details page opens when you:

- Save a complete set of data for a customer in either the Create a New Active Customer page or the Create a New Enrolled Customer page.
- Click the **View link** associated with an existing customer account. Customer accounts are listed in the main Support page as the result of a customer search.

**i Note:** When an unenrolled customer is created on the basis of a set of customer fields that include the customer phone number but not the email address, a (false) placeholder email address is generated for the customer.

## Customer: Merge

You can merge one customer account into another, effectively emptying one account's most significant customer data into another account. The account that is merged into another can belong to either an active or an enrolled customer.

Starting with one customer account selected, you have two merge options:

- You can merge another customer account into the currently selected (enrolled) customer account, or
- You can merge the currently selected customer account into a different (enrolled) customer account.

You can use either options to merge the account of an active (un-enrolled) customer into the receiving account of an enrolled customer, but never vice-versa. The merged customer's accrued points and reward-producing transaction accounts, up to the time of the merge, are transferred into the receiving customer account, the merged account is zeroed out (emptied), and this emptied account is assigned the Merged status.

Note that a merge is not a continuing operation, nor does it implement an ongoing merge in any way. Transactions for the merged customer that are processed after the merge are not transferred to, or associated in any way with, the receiving customer identified during the merge; those transactions are associated only with the original customer. Neither

transactions nor points nor any other attributes of the merged customer are automatically merged to another customer after the one time merge operation is completed.

Note that Savings-to-Date and Rewards data values are not transferred or merged into the receiving account and that this data is not retained.

A note about the merge is added to the Change History section in the receiving account. All other data attributes of the receiving account remain the same.

**After a Merge:** After being merged into another account, the merged account is effectively an inactive account. Although the customer history information has been deleted from the merged customer account, the customer's name and address information remain, and you have the option to enroll this customer using the merged customer account. The deleted data cannot all be replaced, although using the Merge option again, in reverse, can replace some of it.

Before using the **Merge Customer** option, you must first select one customer account to be used in the merge process. This customer's data must be currently displayed in the Customer Details page. If enrolled, this customer account can be the one from which data is drawn or the one into which data is merged.

If the current customer is active, you can only merge the current data into another customer account, and the search returns only enrolled customers.

## Merging Customer Accounts

### Procedure

1. Select customer to be merged in the Customer Details page, and click **Merge**.  
The Merge Accounts page is displayed.
2. Select one of the following values for the first field, **Merge**, from the drop-down menu:
  - a. Current -> into another customer
  - b. Another customer -> into current

Other elements of the page might be instantly redrawn to reflect the merge option you have chosen. If the currently selected customer is active (unenrolled), you cannot merge data into the current customer.

3. Enter text in the **Reason** field that can be displayed to the customer. This should

summarize the merge.

4. Optional: Add an internal note, which is not displayed to the customer, to convey any important information about the merge.

For example, you could use this text field to account for the reason for the merge and any justification or authorization for it. To avoid any data loss, you should have a rationale for performing a merge.

5. Search for the customer. Depending on the merge option you selected in the first step, the account you identify with your search belongs to either the receiving customer or the customer being merged.
6. Click **Next**.

The Confirmation page opens, displaying the data you just entered.

7. If the data is correct, click **Merge Customers**.

A confirmation dialog is displayed, prompting that the merge cannot be undone, and asking if you want to continue.

 **Note:** To end the merge process, click **Cancel**.

8. Click **OK** to confirm that you want to complete the merge process.

The Merge Status confirmation page is displayed.

9. Click **Done** to finish the merge process and go back to the Customer Detail screen.

## Generic Events

You can use Reward's Generic Events framework to capture non-transaction data about customer actions and behavior. Typical examples of generic events include customer actions such as writing a product review, abandoning a product in an online shopping cart, or adding a reward item to a wishlist. Reward can collect these events through generic event batch files or real-time generic event API processing.

For example, you might define customers addition to their wishlist as an event. Referring to this event, the basic definition is: Customer X (subject) AddsToWishlist (action) Product Y (object) on date (time). If you define a customer reviewing a product as an event, the event based definition is: Customer X (subject) Reviews (action) Product Y (object) on date (time).

**i Note:** The generic event framework is used to process data about customers' actions and behavior other than those normally monitored by Reward. For example, Reward always processes customer sales transactions, so transaction data is not considered a candidate for generic event processing. Similarly, data about customer in a Reward administered microsite page can be captured directly by Reward, so that data would not be processed with the generic event framework.

### What do you do with Event Data?

The data collected from these generic events can be used in CRMS profiles to target email or offers to customers.

In addition to collecting data that indicates a type of event has occurred, you can use the generic events options to define events according to whether very specific numbers occurred. Using this you can target customers based on the occurrence of crucial pieces of numeric data associated with the event. These are called "Event Values." You can create more specific targeting rules based on these specific event values.

**i Note:** To work with generic event data, you must first collaborate with Reward to set up the data integration processes. Depending on your needs and capabilities, you can transmit event data to Reward by batch files or through API.

## Generic Event: List Page

The Generic Events page lists all generic events by name.

Navigate to **Admin > Generic Events**.

This displays the Manage Your Generic Events panel, which has a list of current generic events and their definitions.

Click the name of a generic event to see or change the event definition details. You can do the following in the Generic Events page :

- Define an event for CRMS purposes.
- Manage existing events that have been (or are being) defined.
- Clone or delete an existing event definition.

**i Note:** To work with generic event data, you must first collaborate with Reward to set up the data integration processes. Reward modifies data structures to accommodate the event data that you want to save and use. Depending on your needs and capabilities, you can transmit event data to Reward by batch files or through API.

## Fields and Features

The Generic Events page includes the following features:

- The **Create New Generic Event Definition** option, which starts the Create a New Generic Event process.
- The Manage Your Generic Events panel which consists of:
  - Standard navigation controls – the **Show** filter and the **123** page control.
  - The complete list of existing generic events.

Each row in the list represents an event record and displays a few key fields. These fields are lined up in columns. Click a column heading to sort all of the custom questions in the list by that field.

The following generic event fields are displayed:

### Name

The name of the event as defined in CRMS, and set up as a hyperlink to CRMS event record. Click the event name to open the record, either to see or edit its details.

### Reference Tag

A text string that you assign to this event. This tag is used as an internal reference and identifier at the data processing level. For example, an API refers to this event using this reference tag. Must be unique with respect to other reference tags.

### Update

The date when this event record was last modified. Set by CRMS.

## Clone

Click this link to generate a duplicate of the associated generic event record. Note that the only obvious difference is the renamed reference tag, which is changed to "Copy of <original name>". Be sure to change other data as appropriate.

## Delete

Click this link to delete the entire record for the event.

# Creating Generic Event

## Procedure

1. Navigate to the **Admin > Generic Events** page.
2. Click **Create New Generic Event Definition**.  
The Create a Generic Event Definition page is displayed.
3. Define the generic event data to be used for customer targeting in the Generic Event Properties section of the page. (Fields marked with \* are required.)
4. Click **Save** to save your work on a record.
5. When you finish the definition of an event record, or need to save your work and end a session, click **Done**.

# Targeting Generic Event

A generic event must be set up in CRMS before it can be used for targeting.

## Procedure

1. Identify the event and its subject (actor), action, object, any event value that you want to use, and the reversing event (if one should exist).

 **Note:** You can identify one event value in an individual generic event definition.

2. Determine which piece or pieces of event data you use, and how your profile logic

tests this data to select customers.

3. Resolve the generic event data integration issues with Reward. Contact your client services representative to get started.
4. Define the event. (Refer to [Creating Generic Event](#))
5. Define a profile that tests the data collected by the event you defined. If you defined a reversing event, also test that it correctly modifies the event data.
6. Test and confirm that the profile selects the expected customers. Modify the event definition and profile as necessary.

## Generic Events: Reversing Events

In some cases, the effects of a generic event can be reversed by another generic event. For example, if your customers commonly perform an action that is the reverse of another generic event action, you might want to define and capture a "reversing action" for the event. For example, if you have "Add to Favorites" as a generic event, capture the reverse of that action as a reversing event such as "Remove from Favorites".

### Note:

- Define the reversing event first so that it is available for selection when you define the primary generic event.
- The identification of a reversing event is a one time, one way process.
- Be aware that reciprocation is not required and is not allowed. This means that you do not define "Add" as the reversing event when defining the "Remove" event.

If you believe that customers commonly perform an action on the object that has the effect of reversing the effect of another event, contact TIBCO Reward's Account Management department for assistance.

## Product Taxonomy

The product taxonomy displays the following information:

- The hierarchical structure of your product catalog

- Stock keeping units (SKUs), which serve as product identifiers
- Product categories, which define classification of the product (such as clothing categorized by male or female)

The product taxonomy is set up based on each client's product file upload. Navigate to **Admin > Product Taxonomy** to see your imported product taxonomy. After you have uploaded a product taxonomy file, it can be used for offer setup.

**i Note:** The product taxonomy is read-only, and you cannot modify it through CRMS. It simply displays the results of the product file upload.

Contact your TIBCO Engage Customer Loyalty Manager for more information about the product taxonomy.

## Tiers

Tiers define a group of customers to which you can target offers. Members of higher tiers generally receive more benefits than members of lower tiers. Tiers can be used to incent customers to increase spend, shopping frequency, and so on. For example, customers who spend over 200 monetary units achieve silver status; customers who spend over 400 monetary units qualify for the gold tier, and gold tiers members receive more benefits than silver tier members.

Tiers can be set up on the backend during system implementation and modified through profiles in the CRMS user interface. If tiers were implemented in the initial configuration of your loyalty program, you can use the customer targeting profiles in CRMS to target offers to one or more of the tiers.

**i Note:**

- Adding or changing the profiles attached to tiers can have significant effects on your loyalty program. For example, modifying offers and point conversions based on tiers might cause point discrepancies. Tiers are only evaluated once every 24 hours and hence changing the profile, which is attached to a tier, can potentially cause customers to get the wrong point accruals until the tiering process runs again.
- **Customer Profiles > Dimension > Tiers and Admin > Tiers** is not displayed in the user interface, if tiers are not enabled in your initial configuration. Contact your Account Manager for information about setting up tiers.

## System Based Tiers

### System based tiers example

In a system based tier configuration, tiers and their properties are set up during the client onboarding process. For example, tiers can be created based on the amount of customer spend, which can earn points, during the initial system configuration for base, silver, and gold tiers. Everyone who signs up is in the base tier. Customers who spend over 200 monetary units achieve silver status. Customers who spend over 400 monetary units qualify for the gold tier. Then you can exclusively target offers to customers who belong to a specific tier.

### Profile based tiers example

After system based tiers are defined on the backend, CRMS users can determine membership in those tiers through the use of profiles. Additionally, CRMS users can target offers to predefined tiers.

**i Note:**

- CRMS users cannot remove the tier definition that is configured on the backend; however, it can be modified through the use of profiles.
- After setting up profile based tiers, system based tier qualification rules also continue to determine tier membership.
- Customers who meet the system based qualifications or the profile based criteria are included in the tier.

## Editing Tier

**Warning!** Editing the name and properties of an existing tier might cause customer point discrepancies and is not a good practice.

### Procedure

1. Select **Admin > Tiers**.

The Tiers page is displayed, which shows the predefined tier configuration and a list of tiers.

2. Click an existing tier from the **Tiers** list.

The Base Tier page is displayed.

3. In the Properties section, you can change the name of the tier.

4. In the Profiles section, you can determine which profiles qualify for this tier.

## Targeting Tier

### Procedure

1. Select **Target > Customer Profiles**.
2. Open an existing customer profile or create one.
3. In the Customer Targeting page, select **Dimensions > Tiers**.

**i Note:** No tier dimension is displayed if your system is not configured to support tiers.

4. Choose at least one tier by selecting its check box in the list of tiers.  
The offer is targeted only to the selected tiers.
5. Select or clear the **Customer MUST match** check box, as appropriate.
6. Click **Save** or **Done**.

# 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.

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