



# **TIBCO® Reward**

## **CSR User Guide**

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# CSR

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This guide 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

You can access CSR by selecting **Support** from the CRMS menu or by typing the CSR application URL in the browser. The CSR page provides access to all existing customer accounts for creating and managing customers.

The CSR 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.

## CSR: Roles and Privileges

The following are the two types of CSR users who have access to the CSR Support page:

- **CSR Administrators** CSR Administrators have privileges to perform the following tasks on enrolled customer accounts
  - View Details
  - Adjust Points

- Merge
- Change Status
- **CSR Users** have access only to a limited set of CSR tools. CSR users do not have access to sensitive customer information, nor can they perform certain operations on customers, such as merging accounts or transferring points.

CSR users have privileges to perform the following tasks on an enrolled member:

- View Details
- Adjust Points
- Merge
- Change Status

A CSR user can find any existing customer account and display the customer data in the Customer Details page. CSR users must occasionally refer certain requests for example, enrolling an unenrolled member to a CSR administrator.

## Roles and Permissions Related to CRMS and CSR

Role	CRMS Related Permissions	CSR Related Permissions (Enrolled Member)
CRMS Administrator	home	Add new customer
	promote	View details
	loyalty	Edit info
	target	Email prefs
	signage	Adjust points
	content	Reset password
	rewards	Merge

Role	CRMS Related Permissions	CSR Related Permissions (Enrolled Member)
	reports	**Change Status/Unroll/Enroll
	support	Manage cards
	admin	Customer view
		** Enroll appears only if member is unenrolled
CSR Admin	home	Add new customer
	reports	View details
	support	Adjust points
		Merge
		**Change Status/Unroll
		No permission to enroll and unenroll member
CSR User	home	Add new customer
	support	View details
		Adjust points
		Merge
		**Change Status/Unroll

Role	CRMS Related Permissions	CSR Related Permissions (Enrolled Member)
		No permission to enroll and unenroll member

## About Customers

You can create two basic types of customers:

- **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 or use the CSR URL to login.

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.

 **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 or use the CSR URL to login.
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 many 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 on the left pane:

- Customer: Information
- Customer: Status
- Customer: Cards
- Customer: Change History

The Customer Details page also provides tabs on the right panel to get details about [Transactions](#), [Rewards](#), [Emails](#) and so on. If CSR is configured for additional tabs to provide more information, those tabs are also displayed.

In addition to displaying customer information in several categories, the Customer Details page provides links to other customer pages in the top bar to add and modify customer data. See, [Customer: Edit](#) for details.

**TIBCO Customer Management**

Apple, Microsoft, CSR Admin, Points and Credits - **CSR**

[Back to Search](#) [Add New Customer](#)

**Customer Details**

[Adjust Points](#) [Merge](#) [Change Status](#)

**Information**

Name: amy@PLT  
 Address: 111, Sutter, San Francisco, CA 94111  
 Phone: (916) 252-7362  
 Email: amy@PLT@tms.655729514506112@QIA.BW  
 Member ID: 999557  
 Status: [View](#)

Available Points: 14061  
 AutoPays: 0  
 Bonus Point Group: 0  
 Tier: CSR-Ruler  
 Tier Start Date: 01/23/2013  
 Tier Expiry Date: N/A  
 Marketing Program Number:  
 Customer Type: Enrolled Member  
 Email Opt In: No  
 Program Date: 08/20/2016  
 Create Date: 01/22/2015  
 Current Year Limit:

**Cards**

Customer does not have any cards

**Change History**

No records in history

**Latest Transactions**

ID	Date	From	Points	Amount
1878014_7	1/21/2015	KLette Jansil	1	50.00

**Latest Rewards**

ID	Transaction Date	Award Date	Description	Value
191894870	2/29/2016	3/11/2016	Test Offer 470	Reward Code: KCLow-Unique
191100902	1/14/2016	1/14/2016	Offer Target	3 Points
191199933	1/14/2016	1/14/2016	Offer Target	12 Points
191288964	1/13/2016	1/13/2016	Offer Target	3 Points
191197995	1/13/2016	1/13/2016	Offer Target	12 Points
191097026	1/13/2016	1/13/2016	Offer Target	3 Points
190996057	1/13/2016	1/13/2016	Offer Target	12 Points
190895088	1/13/2016	1/13/2016	Offer Target	3 Points
190794119	1/13/2016	1/13/2016	Offer Target	12 Points
190693150	1/13/2016	1/13/2016	Offer Target	3 Points

**Latest Emails**

ID	Date	Subject	Status
There are no emails to display.			

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## Customer: Information

The Customer information section provides the following details about the customer:

- Name
- Address
- Phone
- Email
- Member ID

**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 Status** section of the Customer Details page displays the overall status of the customer. Following are the details displayed under it.

**Customer Type** field displays the current status of the customer and following are its valid values:

- **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.

- **Merged**

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.

- **Deactivated**

Deactivation changes the customer status to deactivated, 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.

- **Unenrolled**

When an enrolled customer is unenrolled, they become inactive and are not a loyalty program member. Unenrolled customers can be enrolled again. One notable exception is: if the customers closed the account by themselves, no CSR user, not even an Administrator, can reactivate the account.

### **Available Points**

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

### **Program Join Date**

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

### **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 receive 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. Depending upon your configuration, additional information regarding Point Groups, Tiers and so on might be displayed in the Status section.

## **Customer: Cards**

If your program includes Loyalty Card enrollment, the card details are displayed under this section for customers.

## **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 tab 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.

## **Rewards**

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

## **Email**

This tab displays 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**, **Date**, **Subject**, and **Status** Columns sorted on date descending. The values in the **Status** column can be **Sent**, **Hard Bounced**, and **Soft Bounced**.

## Customer: Edit

Following are the edit options available in the Customer Details page to add or modify customer details. You can also edit the customer details from the Search Results page. Some of these options might not be available depending on your role and application configuration. See, [Roles and Permissions Related to CRMS and CSR](#) for additional details.

### Edit Info

Opens the Customer Information page, which you can use to edit customer details such as name, address and so on.

### Email Prefs

Displays a dialog-box stating the Email opt-in or opt-out status of the customer. If the customer is currently opted-out, clicking **Confirm** changes the email status to opt-in and vice-versa.

### 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**.

### 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

## 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).

## 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.

### • Unenroll

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.

### • Deactivate

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.



**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.

## Manage Cards

Manually adds card data (credit card, loyalty card, membership card, and so on.) to be associated with an enrolled customer. After you select **Manage Cards** a dialog box is displayed in which you can 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.

## Customer View

This tab gets displayed if microsite is enabled with your application. Clicking this launches the microsite displaying the Customer View page.

# 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_22.2.0_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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