HCLSoftware

HCL Detect v12.1.10 User Guide

Contents

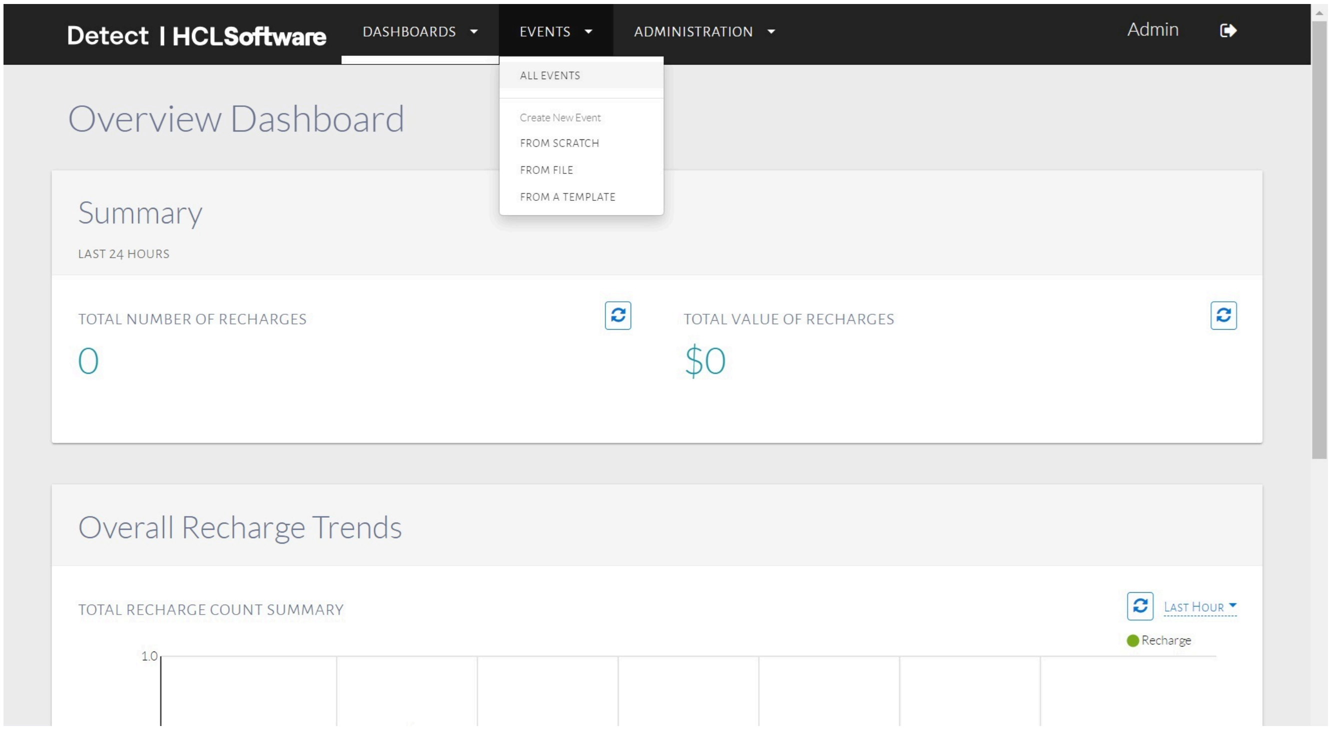
Chapter 1. Terminology

Here are some terms and there definitions that will be used in the remainder of this document.

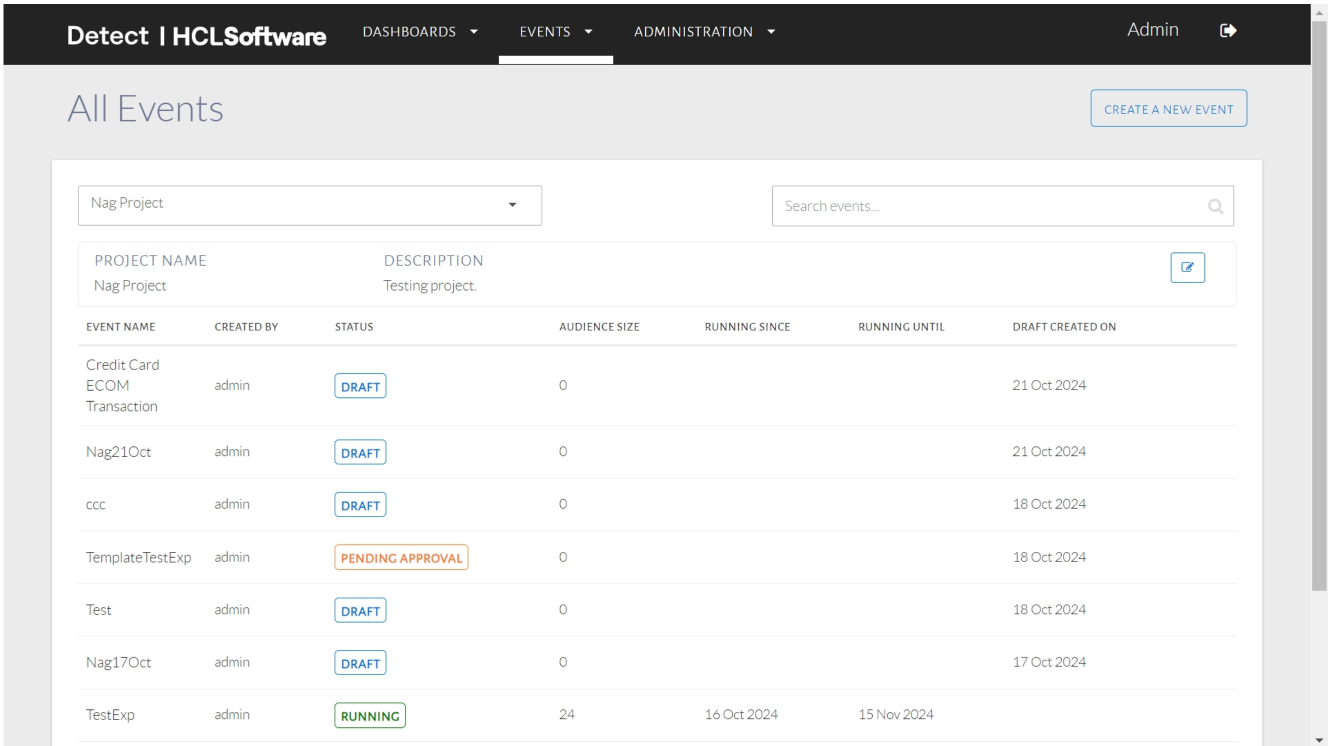
- **Event**: an activity to promote a product or service, as part of a campaign
- **Offer**: a message, product or service given as part of an event
- **Message-only Event**: an event is detected each time a customer fulfills given audience and trigger conditions of a specified amount, cumulative transactions greater than a specified amount or count of transactions greater than a specified count. These can include a time threshold as well.
- **Trigger**: an event that a customer must do to qualify for an event
- **Modifier**: an additional filter that can be included in trigger condition
- **Audience**: customers with specific characteristics targeted by an event
- **Segment**: a set of customers
- **Static Segment**: a saved set of customers
- **Live Segment**: a set of customers that changes based on audience conditions
- **Target Group**: further grouping that can be done, among the customers who qualified for an event
- **Attribute**: a characteristic of an object with an associated value.
- **Aggregate**: data that is gathered and expressed as a summary such as totals or averages.
- **Feed**: an organized stream of attributes or aggregations from different data sources.

Chapter 2. All Events

In the menu bar, click **Events**, and select the **ALL EVENTS** option, as shown in the image below.

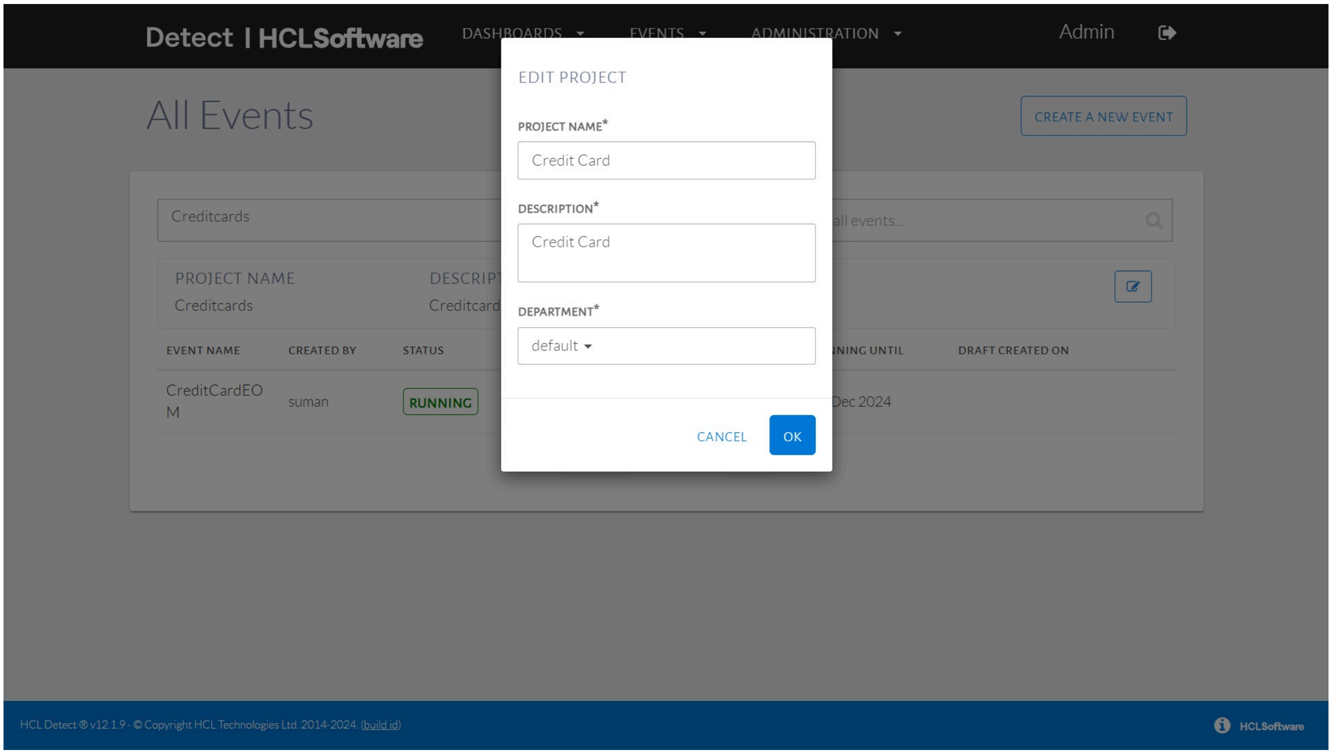


The All Events page displays the project name, project description, search option to search all events and lists all the events specific to the selected project as shown below.



To locate a specific event, type the event name into the search bar and either press **Enter** or click the **Search** icon. This will display a list of all events related to the search term from all available projects.

If required, click **Edit Project** icon at the end of the description section to update the project name and description.


Detect | HCLSoftware
DASHBOARDS
EVENTS
ADMINISTRATION
Admin
All Events
CREATE A NEW EVENT
Creditcards
PROJECT NAME
Creditcards
EVENT NAME
CREATED BY
STATUS
CreditCardEOM
suman
RUNNING
DRAFT CREATED ON
EDIT PROJECT
PROJECT NAME*
Credit Card
DESCRIPTION*
Credit Card
DEPARTMENT*
default
CANCEL
OK
HCL Detect ® v12.1.9 - © Copyright HCL Technologies Ltd. 2014-2024. (build id)
HCLSoftware

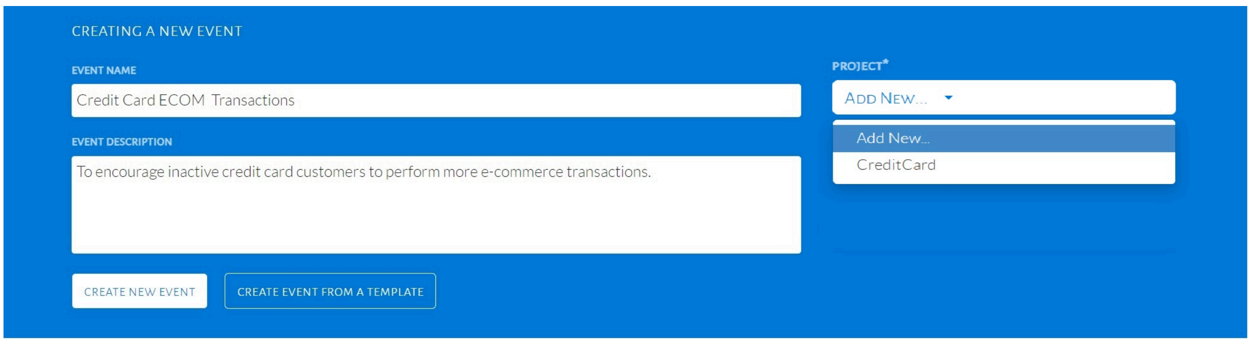
Chapter 3. Create Project

This page explains how to add a new project while creating or editing an event, using the project selection section within the event description page.

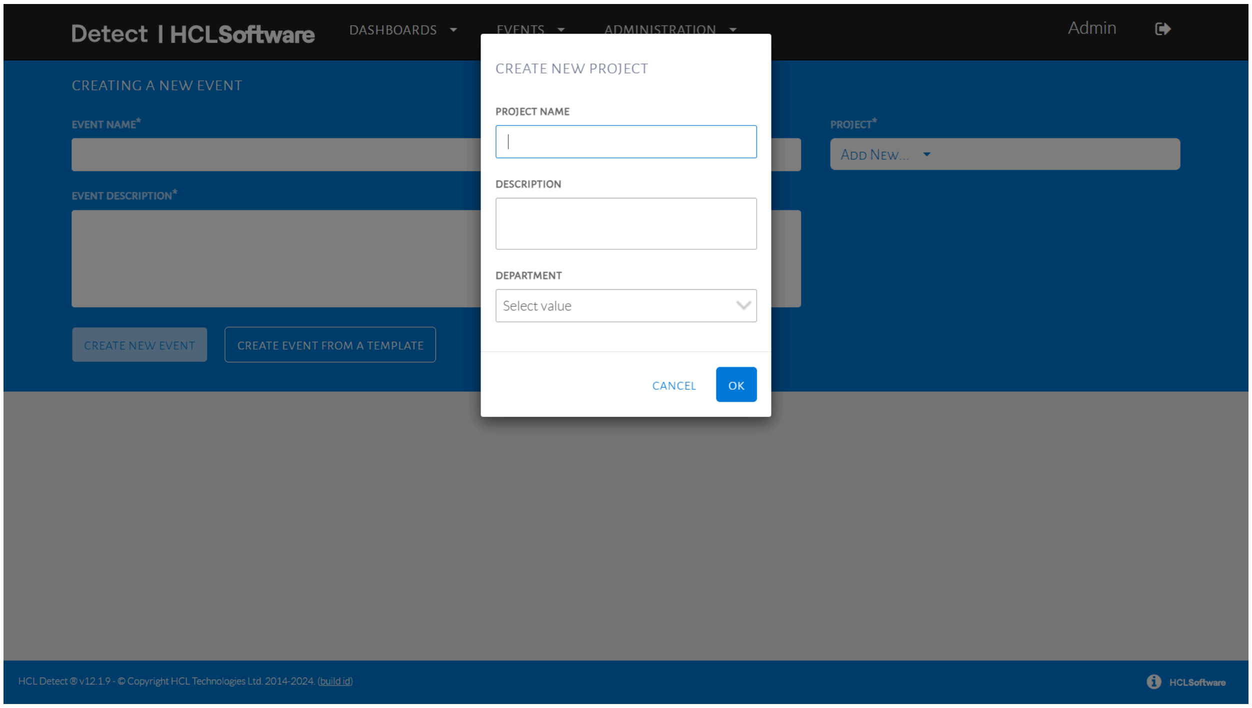
During event creation or editing, users can add a new project directly from the event interface. This allows associating the event with a relevant project, even if it hasn't been created beforehand.

Add New Project Name

1. While filling the **Event Description** section, locate the **Project Name** dropdown.
2. Click on the **Add New...** option from the dropdown menu.



3. A pop-up will appear prompting for:
    - **Project Name** (must be unique)
    - **Description** (optional but recommended)
4. Fill in the details and click **OK** to save.



Example: While setting up an event for "Holiday Discount Campaign," the user adds a new project named "Q4 Retail Promotions."

Chapter 4. Event Workflow

Creating an Event

This page provides explanation on how to create an event from scratch, existing file or from a template.

You can define an event's objective, configure its details, and classify it under an optional project. You can export or import of these events to simplify event management and transfer. Events can be exported as reusable templates to replicate them without starting from scratch. Alternatively, events can be exported as server-stored files, enabling seamless migration between environments with the same application configuration. For demonstration purposes, this topic uses the example of encouraging Credit Card customers to perform e-commerce transactions.

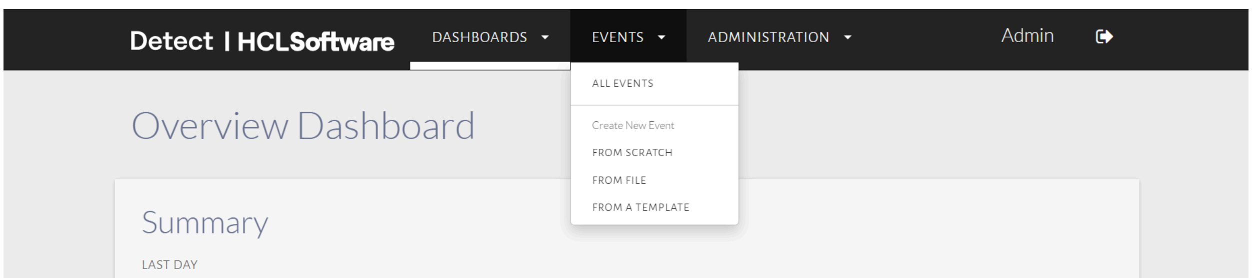
You can create an Event from scratch or from existing event file or from a template.

Create an Event

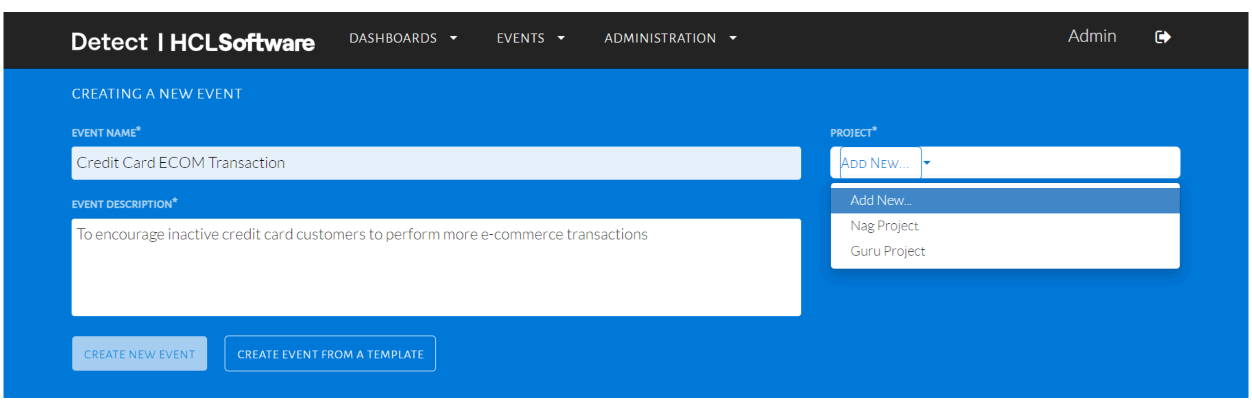
Create an Event from Scratch

To create an event from scratch, follow the steps below:

1. In the menu bar, click **Events**, and select the **FROM SCRATCH** option, as shown in the image below.



2. Fill in the details of the **Event Name** and **Event Description** as shown below. For this event, the objective is to encourage Credit Card customers to make e-commerce transactions.

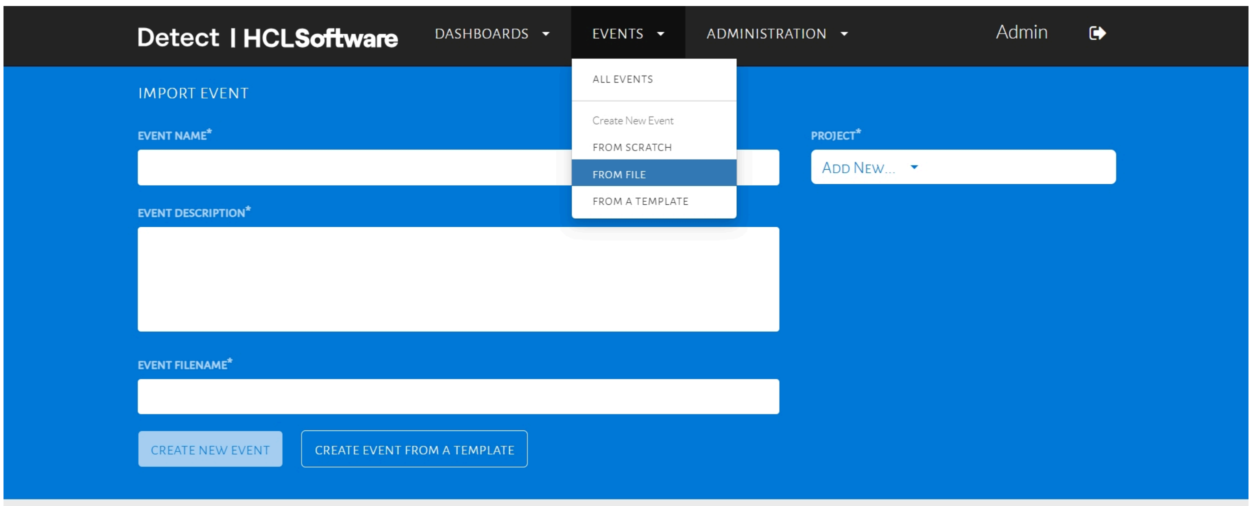


3. Select a project name from the drop-down menu under Project. The event can also be classified under a project, which is optional.
4. Click **Create New Event** to proceed.

Import an Event from File

You can import an event, which is previously exported as a file in the server, to quickly recreate or share event configurations without rebuilding them from scratch. To import an event from an existing file, follow the steps below:

1. In the menu bar, click **EVENTS**, and select the **FROM FILE** option, as shown in the image below.



2. Fill in the details of the Event Name and Event Description.
3. In the **EVENT FILENAME**, paste the file name of the exported event from the server.

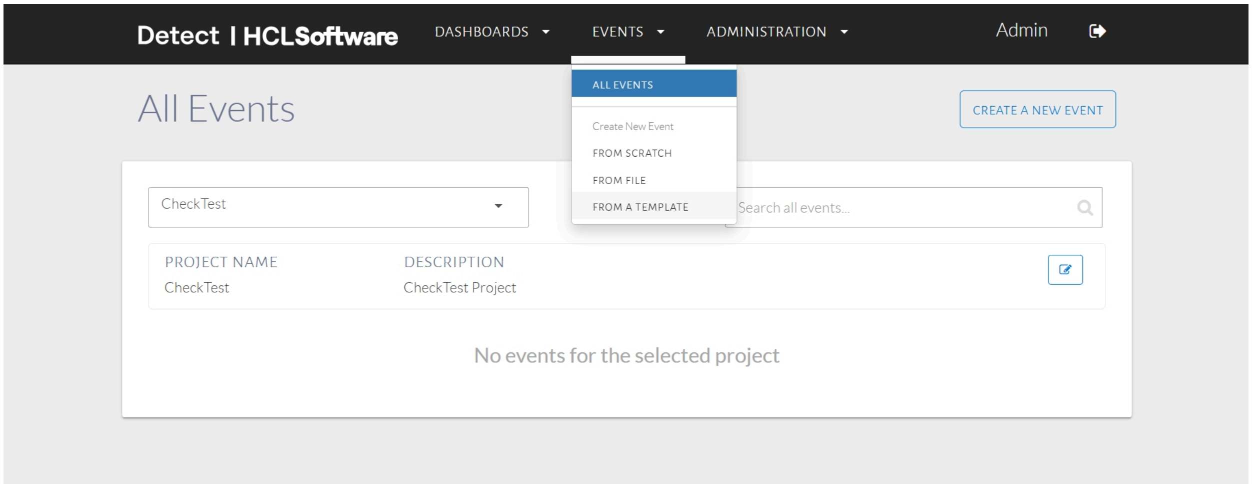
Note: The file name can be available when you export an event. For more information about exporting events, refer here on page 37.

4. Select a project name from the drop-down menu under Project. The event can also be classified under a project, which is optional.
5. Click **Create New Event** to proceed.

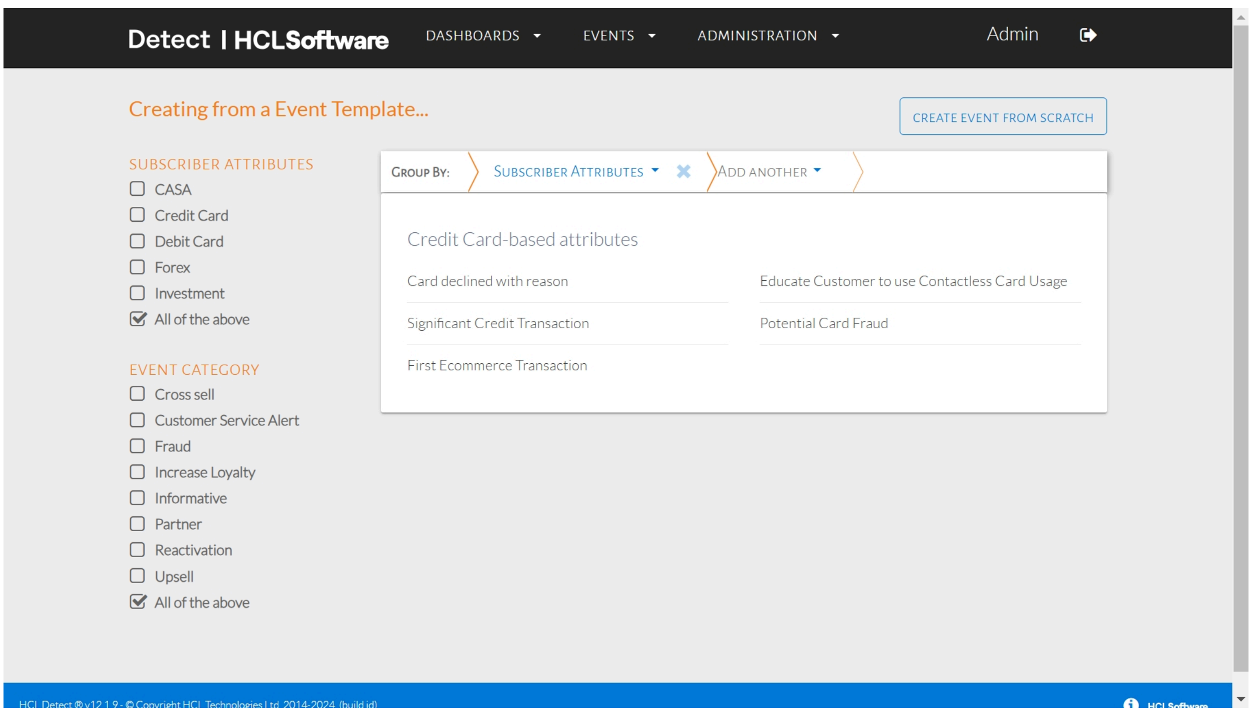
Create an Event from Template

To create an event from template, follow the steps below:

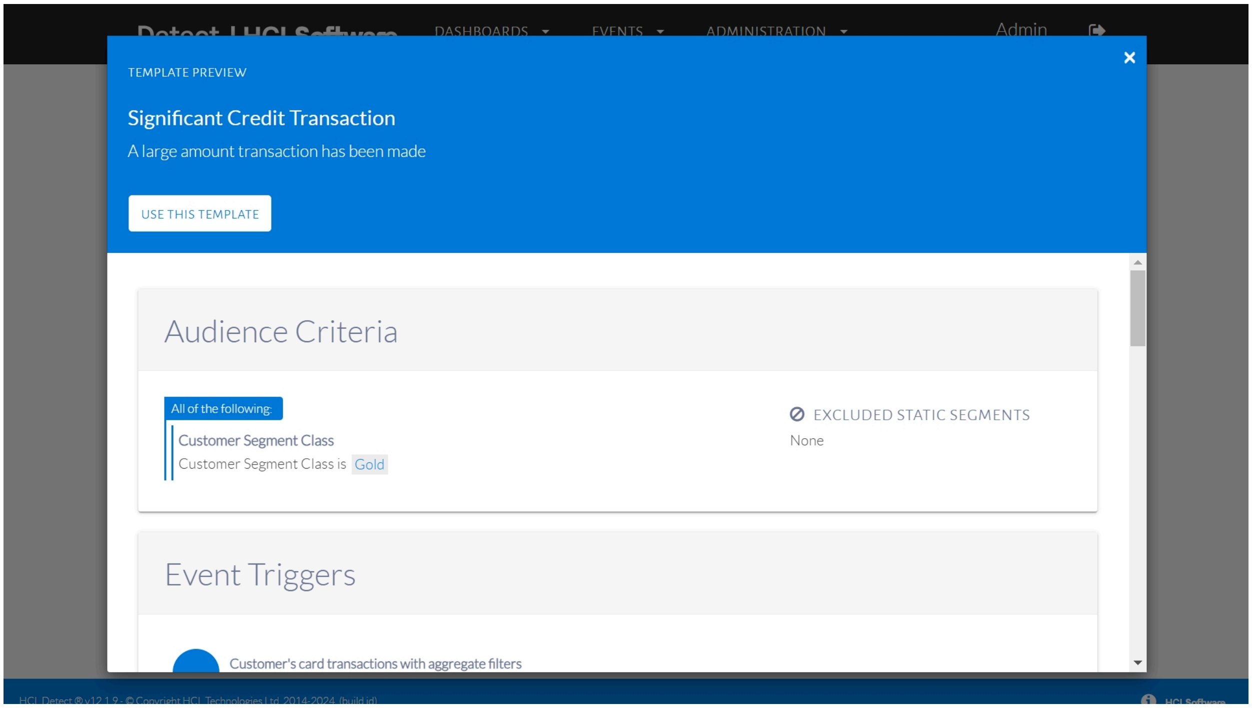
1. In the menu bar, click **EVENTS**, and select the **FROM A TEMPLATE** option, as shown in the image below.



2. In the **Creating from a Event Template** page, in the **Group By**section, select a group, and select a template in the listed templates as shown below.



3. In the **TEMPLATE PREVIEW** page, click **USE THIS TEMPLATE** to create the events using this template.



4. As a result, the **CREATING A NEW EVENT** page will be displayed with pre-filled Audience Criteria, Events Triggers, Events, and Details section. Fill in the details of the Event Name and Event Description.
5. Select a project name from the drop-down menu under Project. The event can also be classified under a project.
6. Click **Create New Event** to proceed.

Configuring an Event

This page explains how to define audience conditions, configure triggers, set up event details, and deploy events to meet your marketing goals.

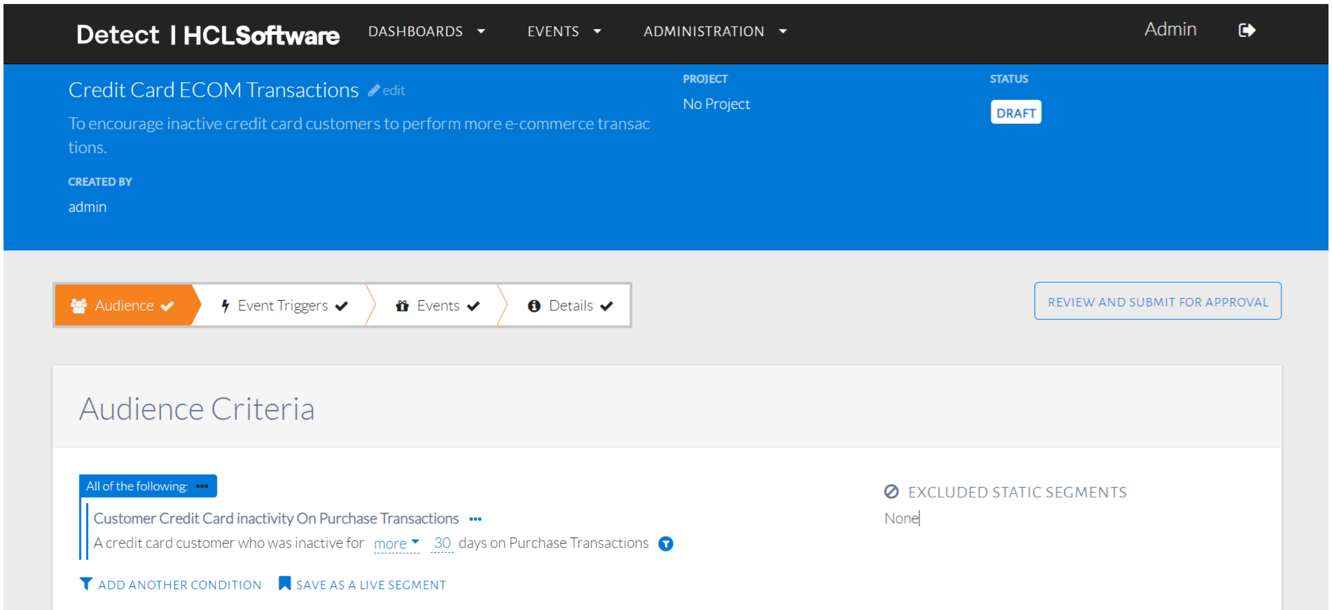
Configuring an event enables businesses to engage with customers effectively by targeting specific audiences, setting relevant triggers, and creating meaningful events. Each step focuses on creating a seamless experience for both your team and your customers.

Configure Event Details

Event Audience

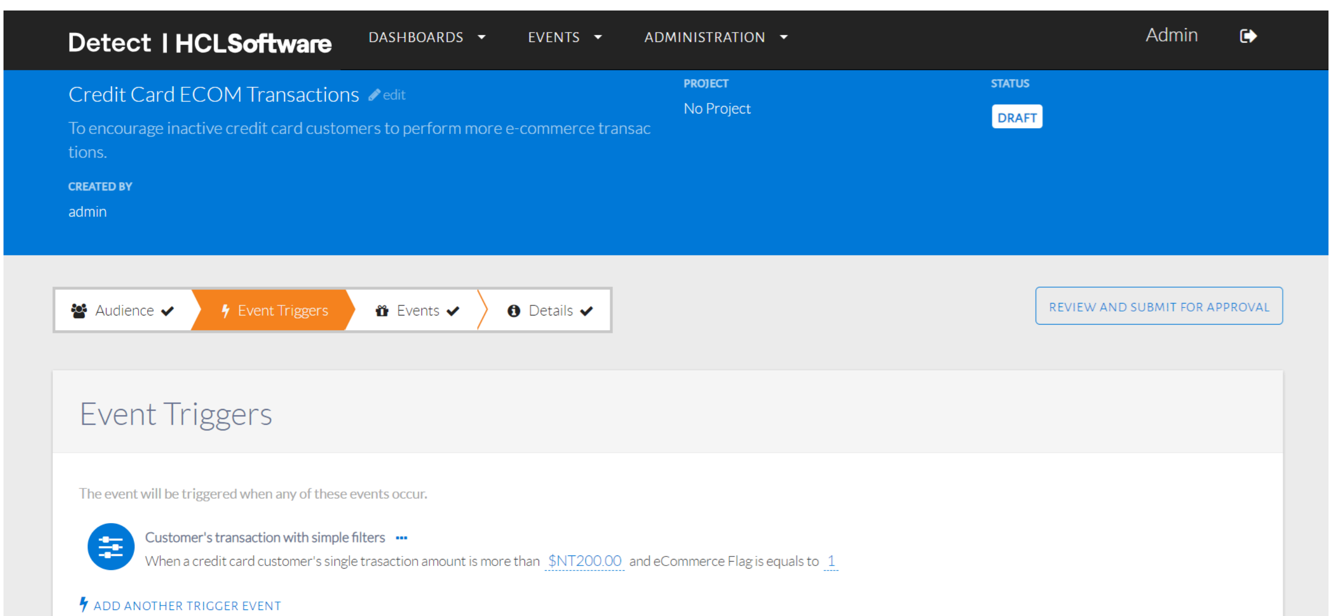
Set the audience conditions, as seen in the image below. These conditions determine the customers to target during the event. We will target customers who have been inactive for more than 30 days on Purchase Transactions. This is a preset audience condition and can be found under "Inactivity from SAP Profile Based Conditions".

Audience Stats, appearing below the Audience Criteria, estimates the number and percentage of customers being targeted by the audience condition configurations.



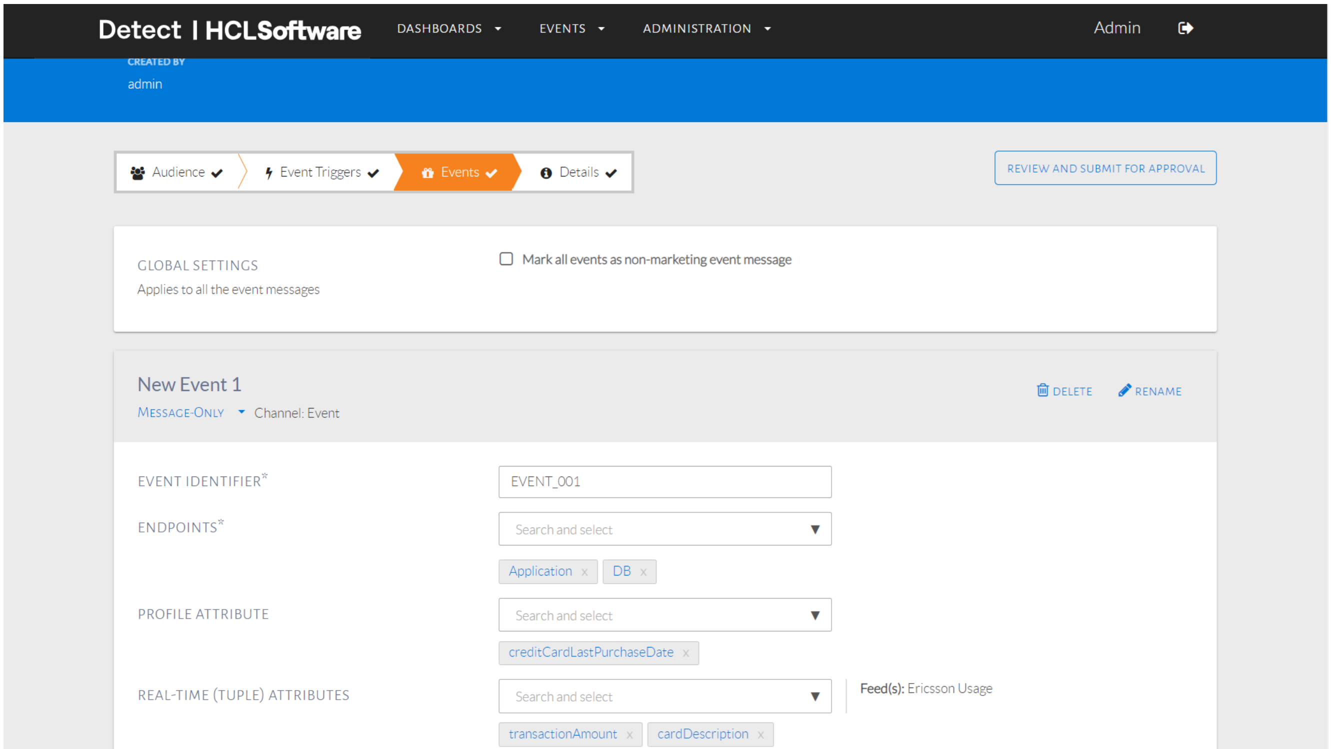
Triggers

Set the trigger conditions, as seen in the image below. These conditions determine which customers have performed a transaction to trigger the event. The customers who satisfy both the audience conditions and the trigger conditions will qualify for the event. We will configure a simple trigger to target customers who spend at least NT $200 via an ecommerce transaction. Once the simple transaction conditions are selected, combinations of filters can be selected via the filter icon in orange (shown below after the transaction amount condition).



Events

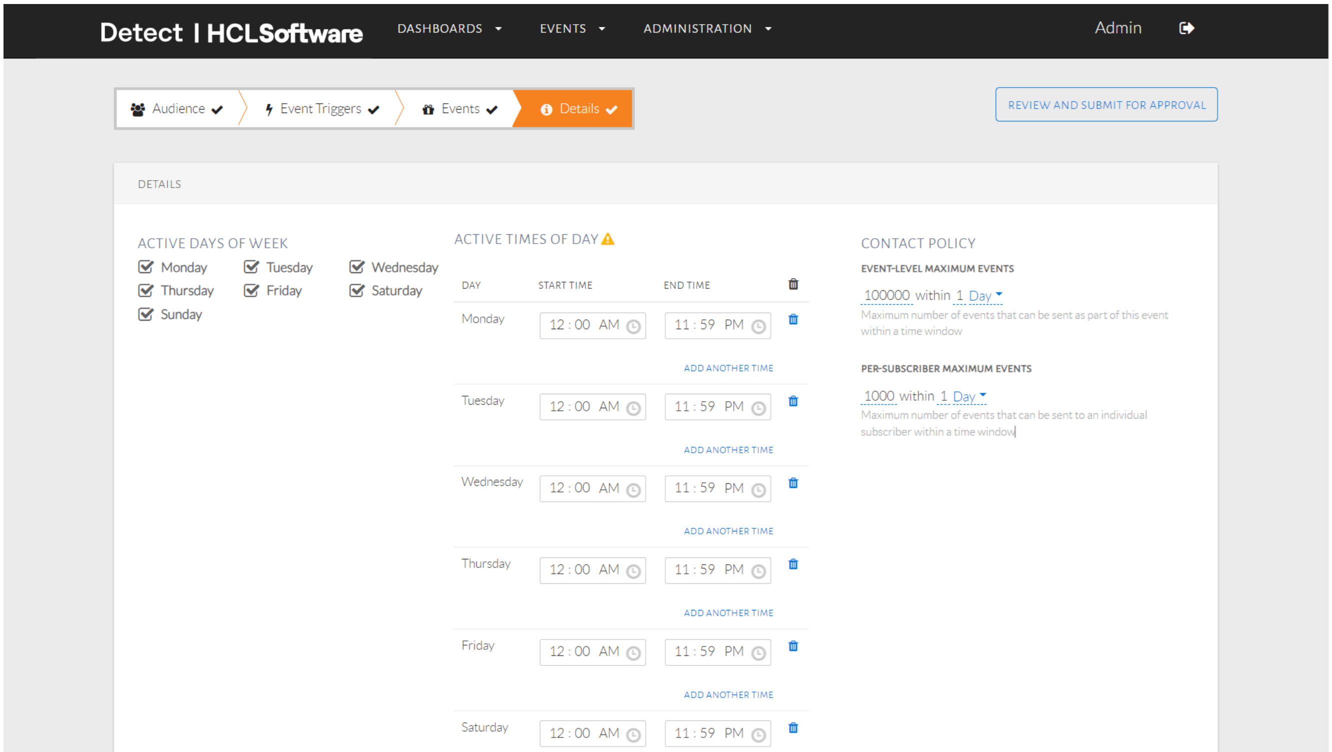
Set an event to be given to the qualified customers, as seen in the image below. Fill up the Event ID to correspond with events configured in the downstream system. Downstream systems can be selected as CDP, Interact or Journey (for real-time events) or DB (for batch events). Lastly, profile & real-time attributes can be selected based on the event & offer.



Additionally, varying target groups can be selected but for this event, we will go with the default target group including the entire audience.

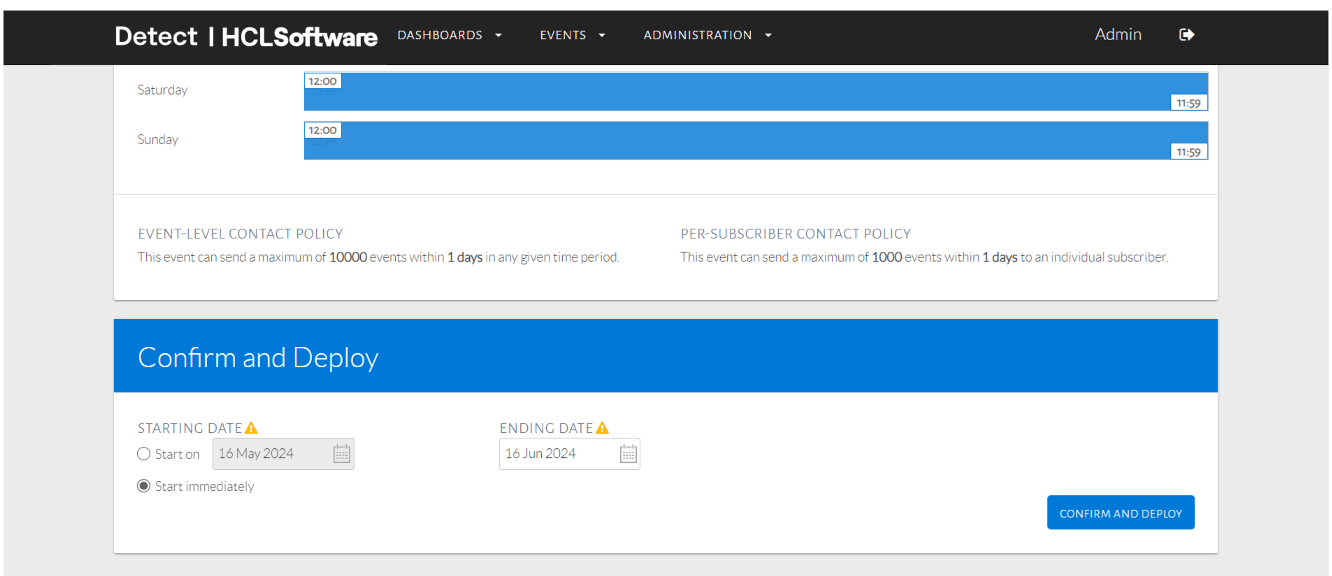
Details

Set the details of the event, as seen in the image below. This event can be scheduled to detect triggers on all days, with a time (or times) for each day specified. Maximum events for a specific customer within a time frame and total customers within a time frame can be selected here as well. Click Save and Continue to Review to proceed.



Review Event

Review the details of the event and specify the dates the event will run. Click Submit for Approval. Once a Checker (or Admin) has reviewed and approved the event, they can select a time period for the duration of the event and deploy it as shown in the image below.

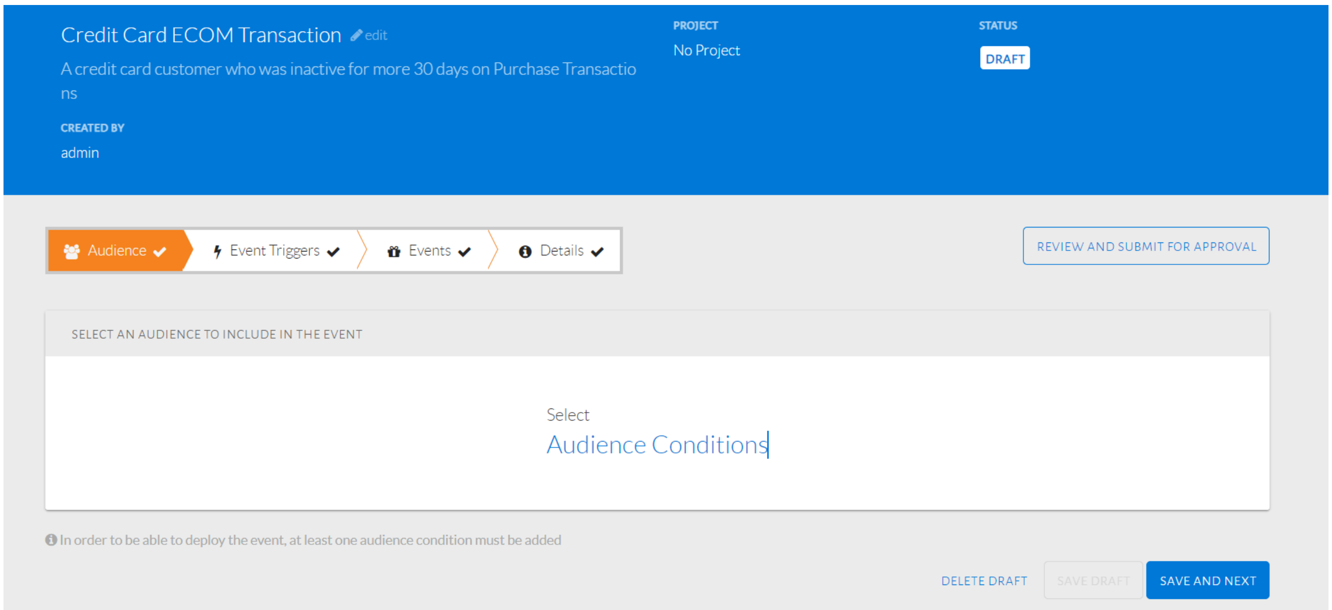


Detailed Steps

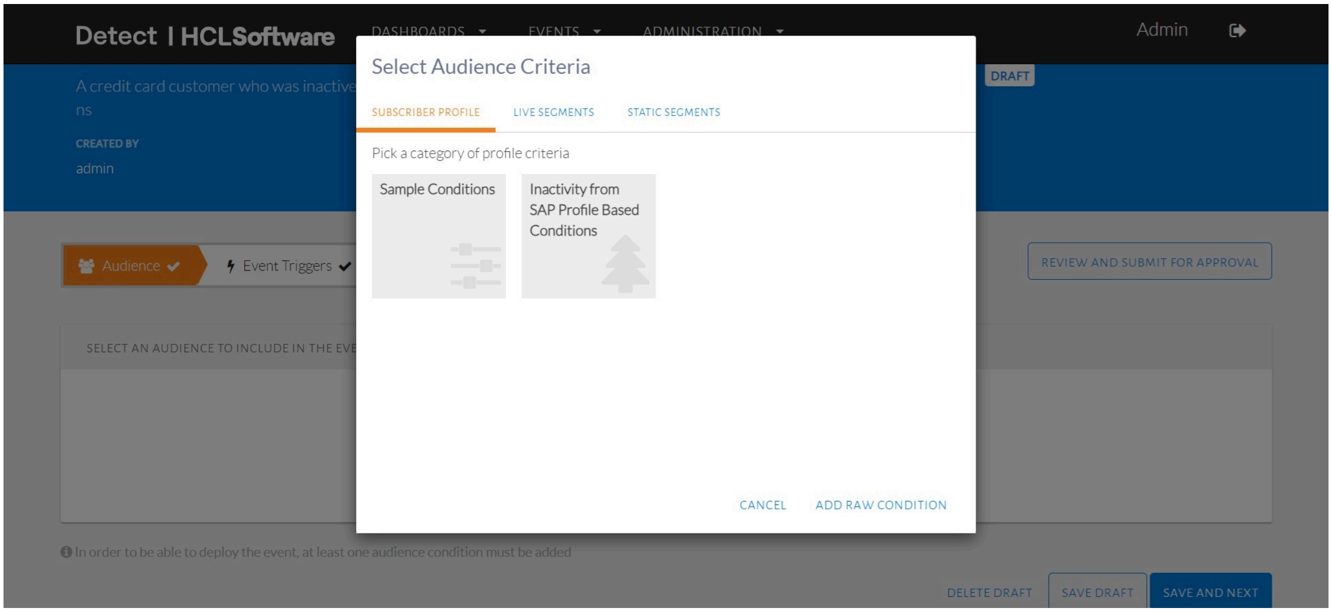
Audience

The audience of an event are customers with specific characteristics that are being targeted. For this event, the audience are customers who have Credit Cards and who have been inactive in the last 30 days for Purchase Transactions.

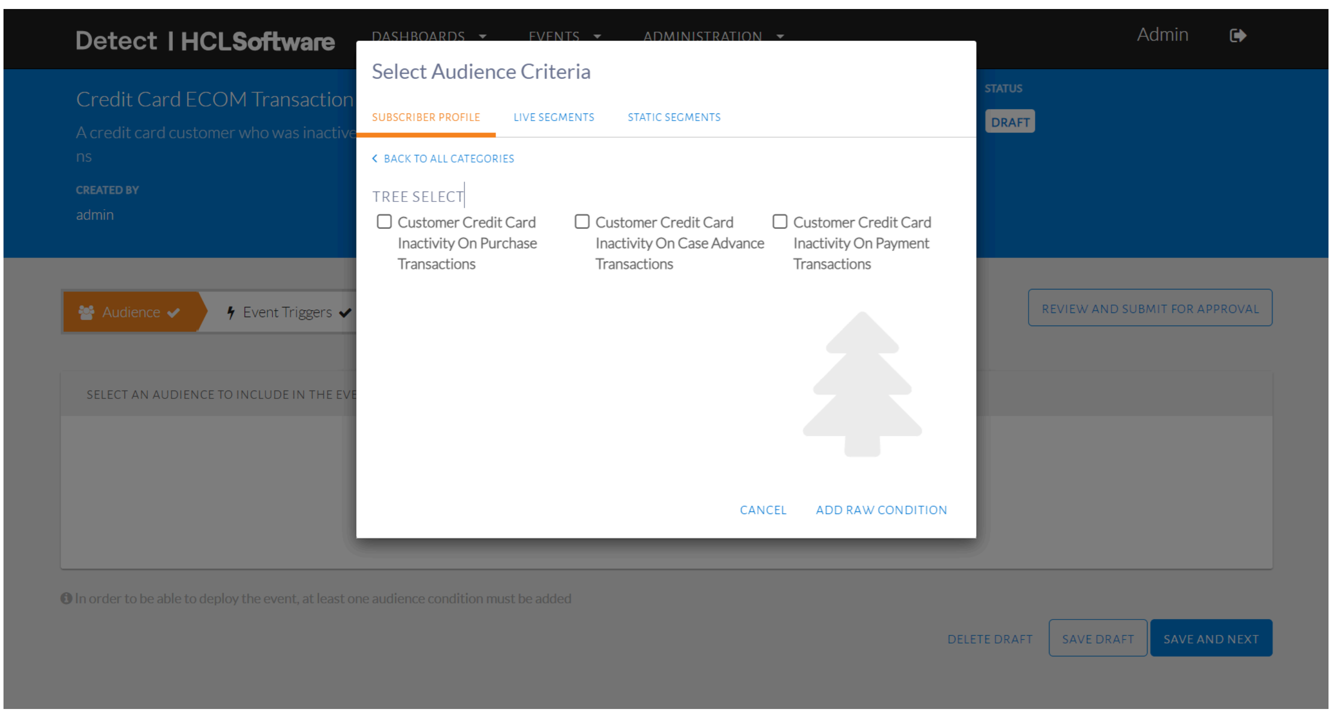
After proceeding from Event Description, a page will be displayed as seen in the image below. Click Audience Conditions to begin selecting conditions.



A pop-up will be displayed as seen in the image below where the user can choose from different conditions. The Subscriber Profile tab shows 3 general categories.

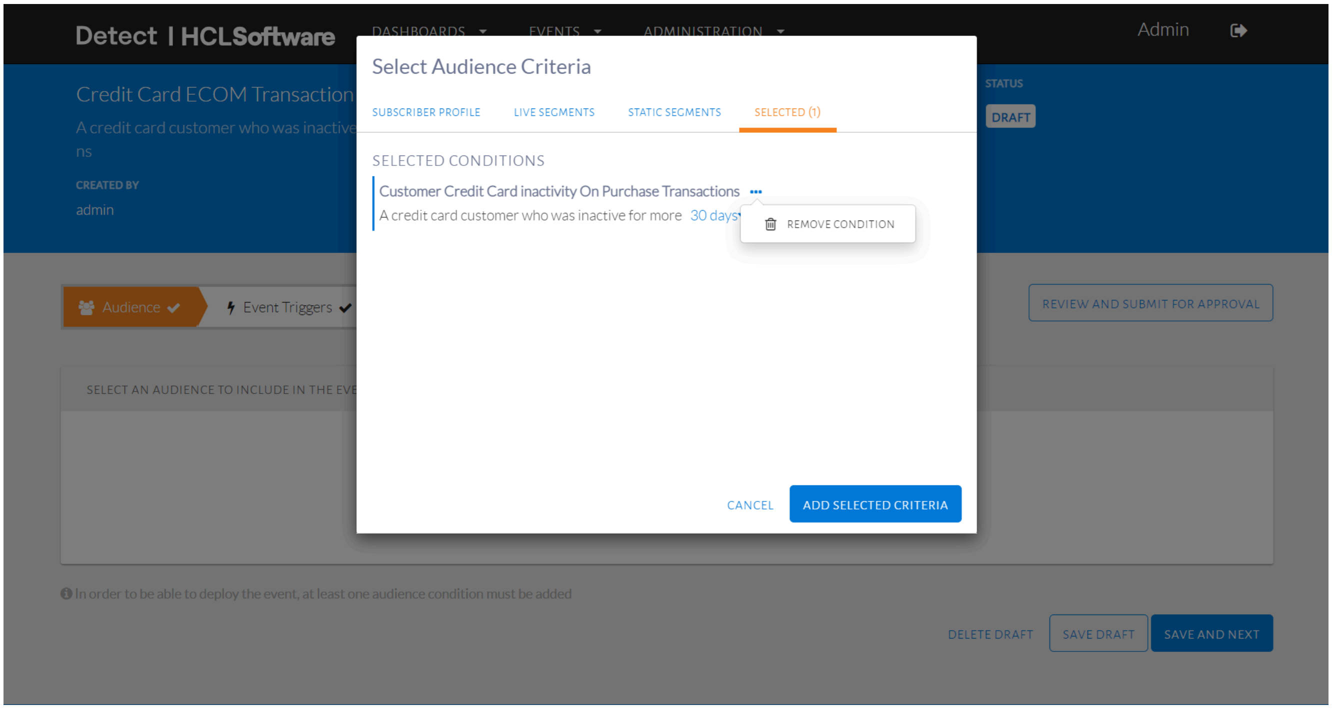


Profile-Based Conditions filter customers by their profile attributes such as age, gender or nationality. Real-Time Usage Based Conditions filter customers based on their real-time transactions. Inactivity based Conditions filter customers based on the last activity recorded on their card as seen in the image below. Hovering the mouse over a condition will show the condition, where the underlined words represent values that can be altered for that filter.

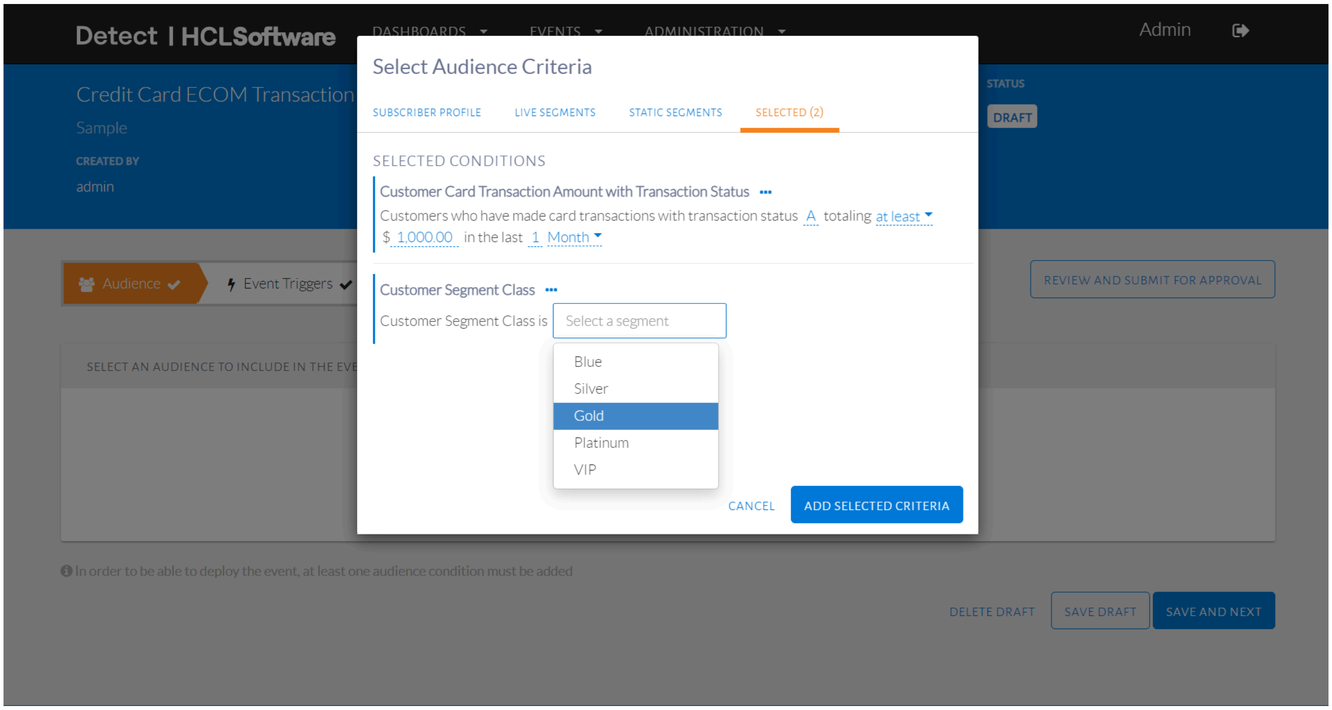


The selected condition must allow us to filter the count of transactions in the last 1 month. Therefore, the selected condition is Inactivity on Purchase transaction count for credit card transactions.

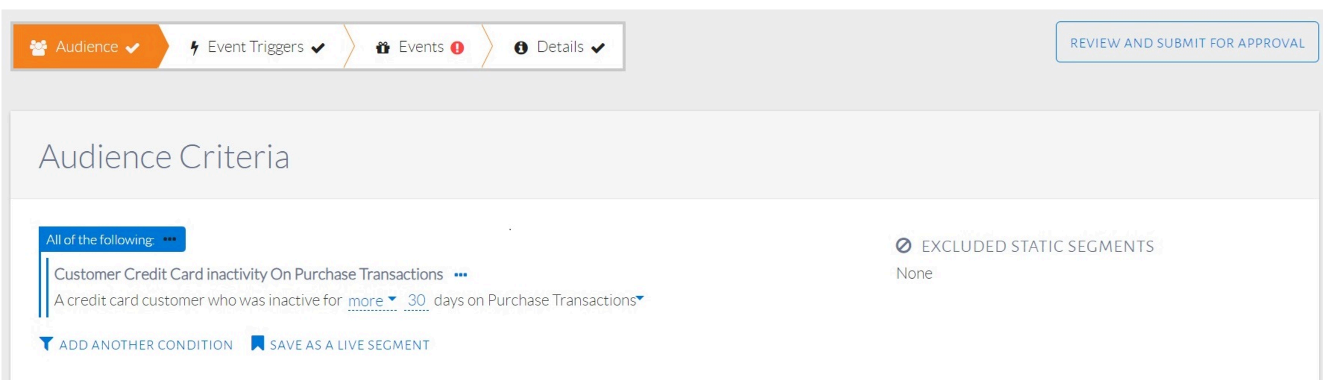
The user can choose many different kinds of conditions and view all on the Selected tab. A condition can be removed, as seen in the image below.



A condition can also be edited on this tab, as seen in the image below. The values in orange represent the different filters that can be altered. In the figure below, Customer Status has valid options that can be selected. Another example is in the inactivity condition, where more or less can be selected and the time period can be changed. Once editing is complete, click Add Selected Criteria to proceed.



The audience conditions will then be displayed as in the image below. The values in orange can also be edited on this page, just as on the Selected tab.

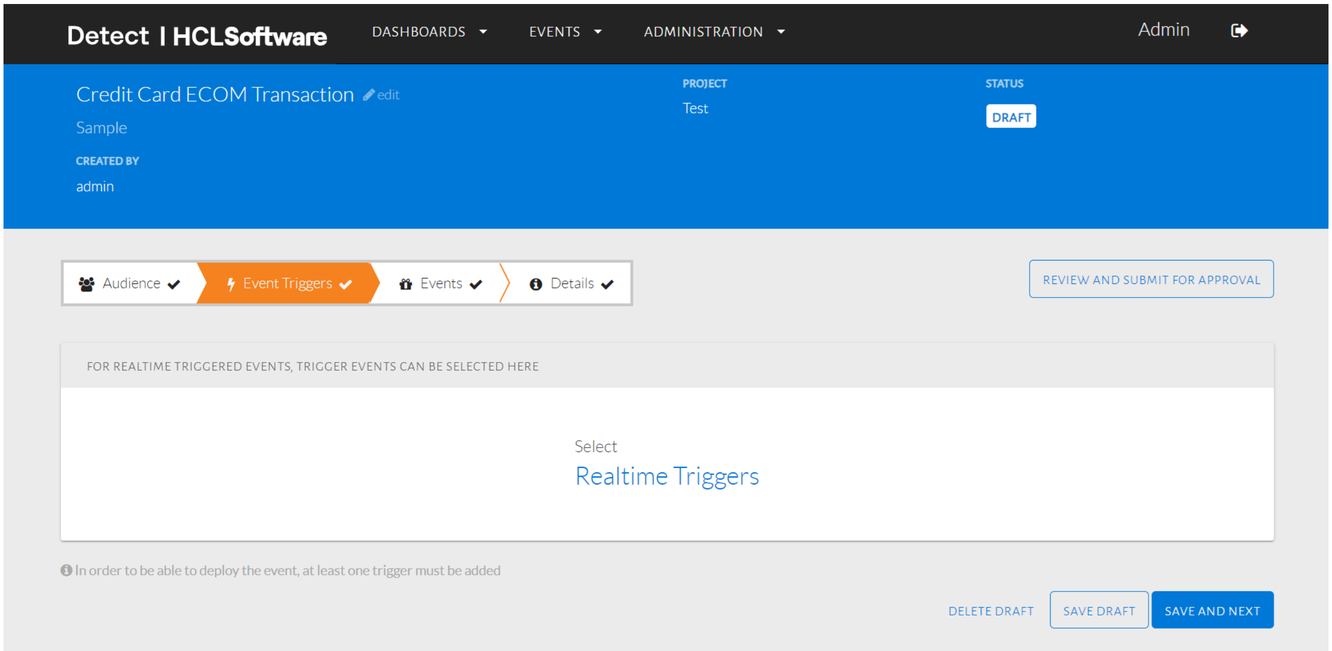


Under Audience Stats, the Estimated Size shows the number of customers who have satisfied the audience conditions, or audience size. The Percentage of Total Subscriber Base being targeted is also shown. Click Save and Next to proceed. To delete or save the draft click those respective options.

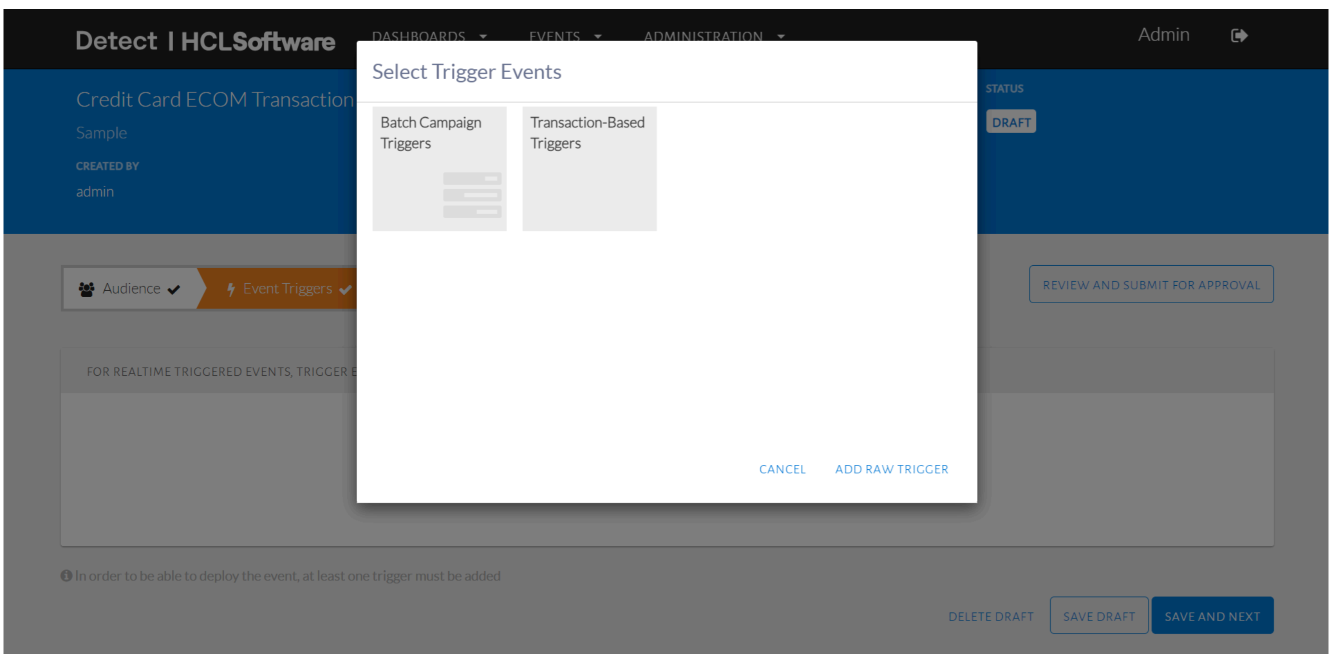
Trigger

The trigger is an action a customer must do to qualify for an event. For this event, the trigger is when a customer uses their Credit Card to make an ECOM transaction worth more than NT $200.

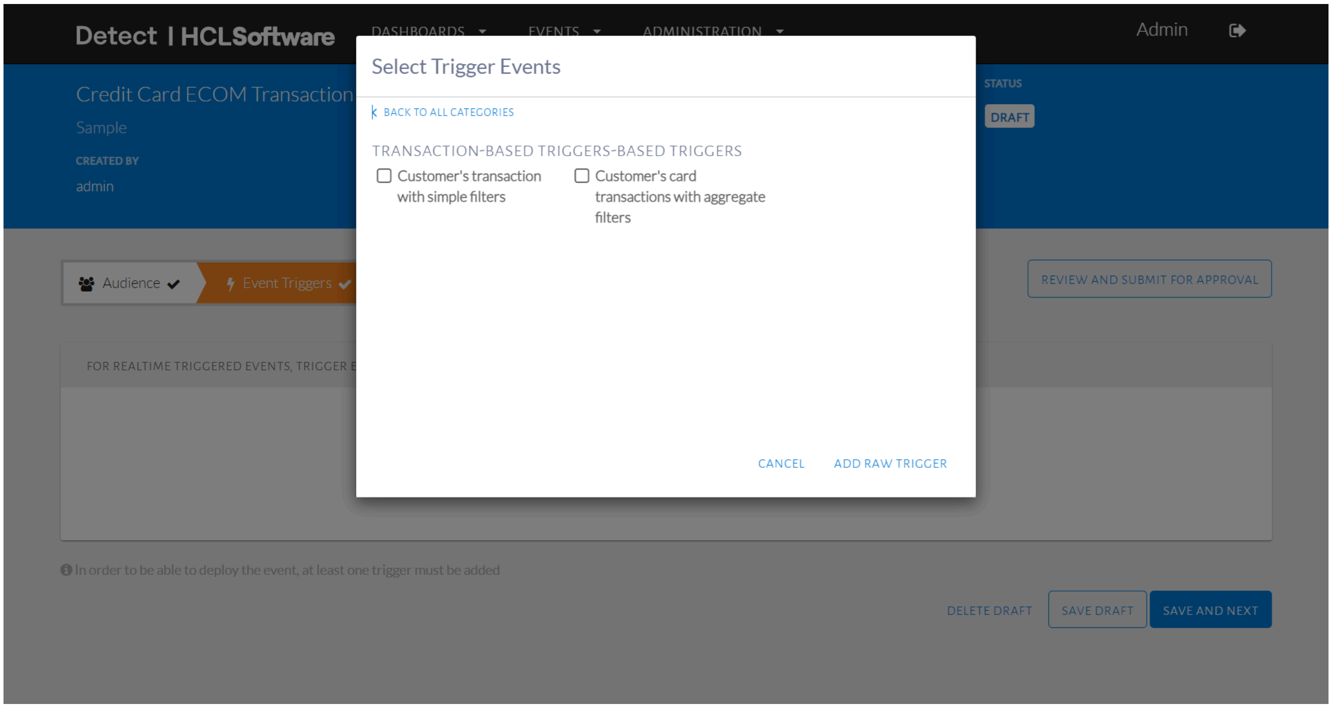
After proceeding from Audience, on the Event Triggers tab, click Real-time Triggers to begin selecting conditions.



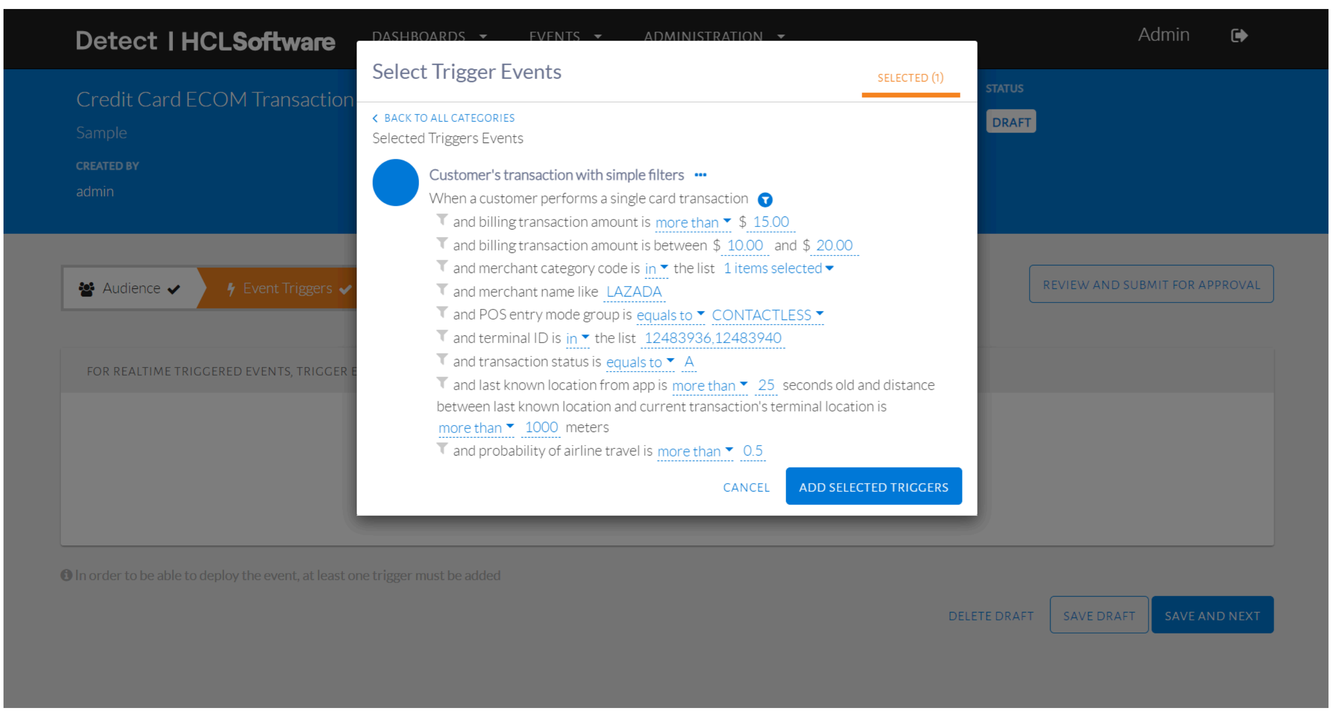
A pop-up will be displayed as seen in the image below where the user can select from different conditions. The generic category for trigger condition here represents the real-time source feed.



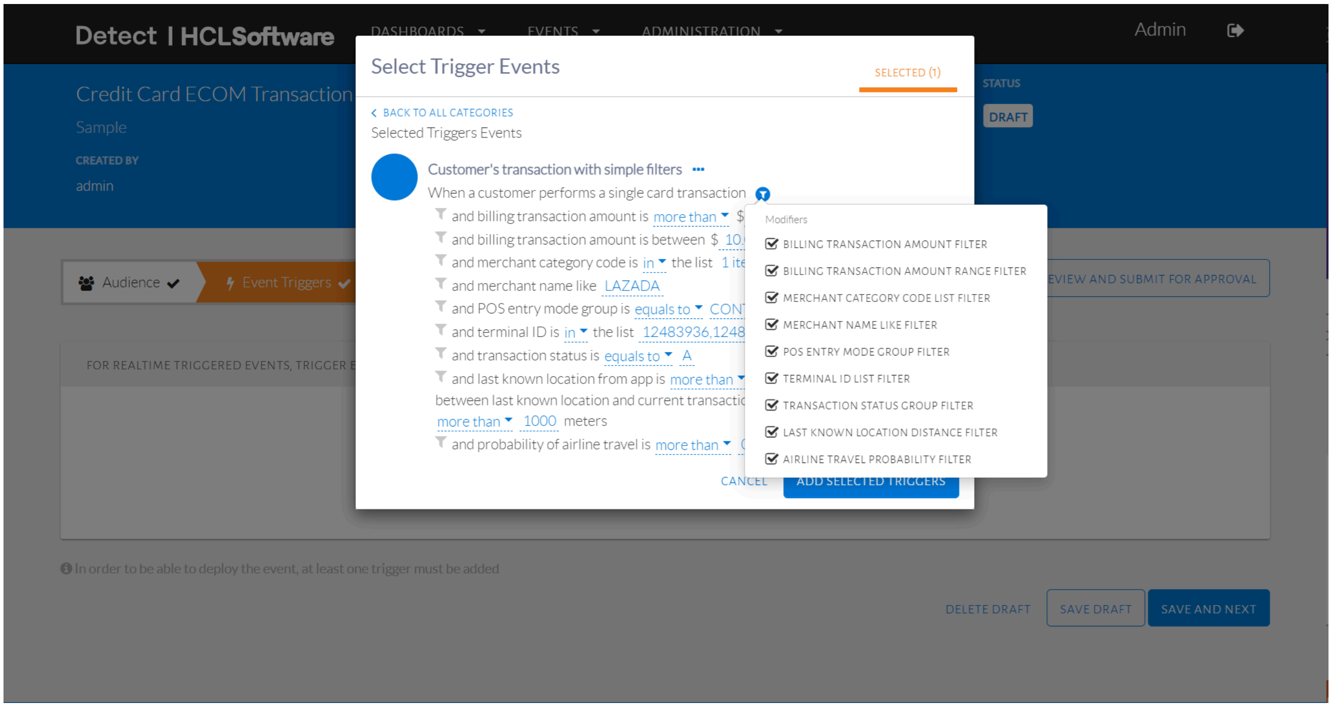
Transaction-Based Triggers monitor all customers (not just those in the audience) and identify those who have done a specific type of transaction, the moment they do it. The different trigger conditions can be seen in the image below. Hovering over a condition will show an example, where underlines represent values that can be edited for the filter.



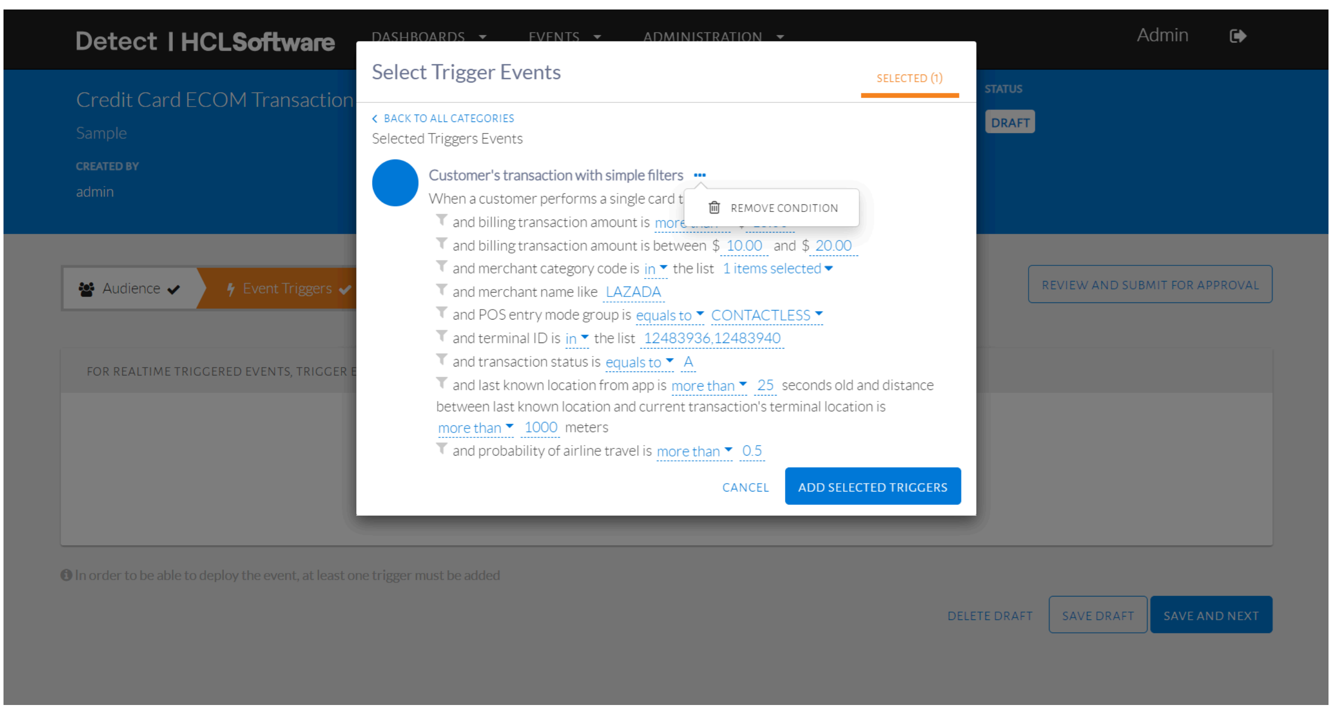
Modifiers for each condition are also available, which are additional filters. These can be seen when a trigger condition is selected and viewed on the Selected tab, as shown in the image below.



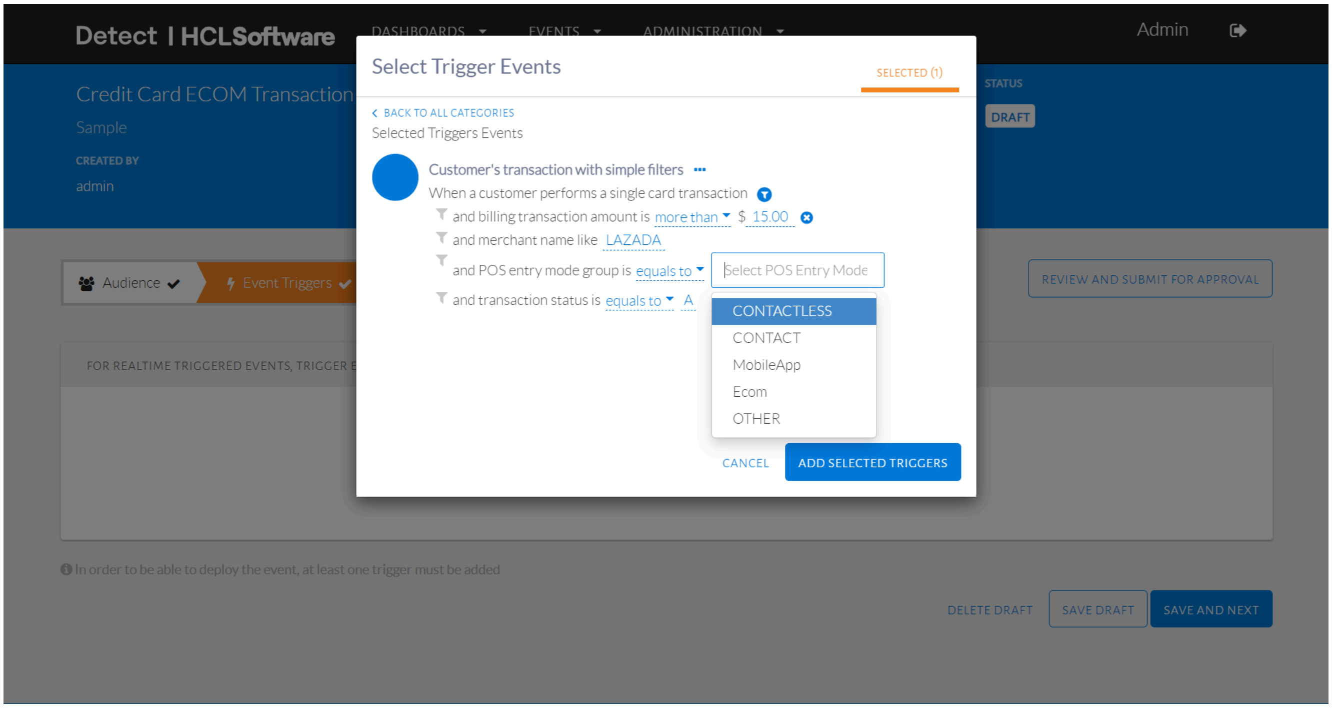
Modifiers can be selected or unselected by clicking the filter symbol beside the main trigger condition, as seen in the image below. This will show a checklist with a modifier that can be added in conjunction to the main filter selected. The user can also remove a selected modifier by clicking the cross icon beside its name.



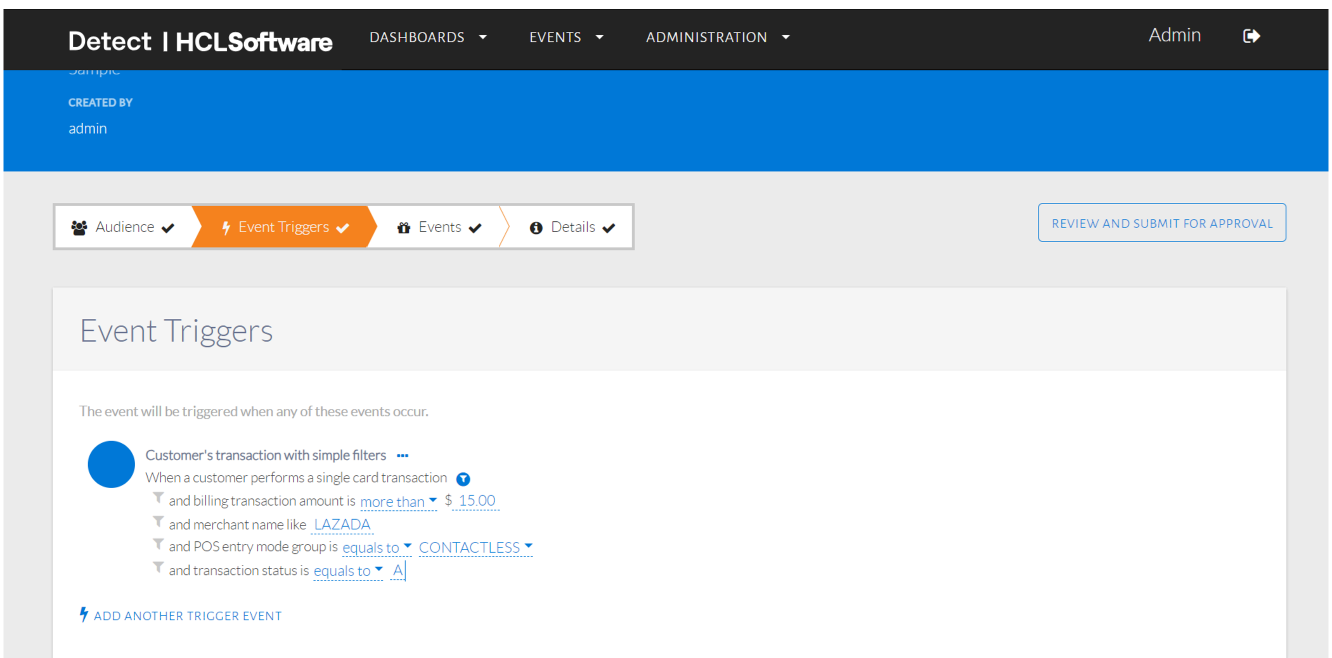
Similar to audience conditions, the user can choose different kinds of trigger conditions and view all on the Selected tab. A trigger condition can be removed as seen in the image below.



A trigger condition can also be edited on this tab, as seen in the image below. The values in orange represent the different filters that can be specified. Remove credit card description and click Add Selected Triggers to proceed.



The trigger conditions will then be displayed as in the image below. The values in orange can also be edited on this page, just as on the Selected tab.



For this event, we will select ecommerceFlag = 1, with a minimum of NT $200 as the transaction amount, as seen above in the image above. The final trigger condition is configured. This condition will monitor all transactions for an ECOM transaction worth more than NT $200 made using a Credit Card. It will then identify the customers who made this transaction.

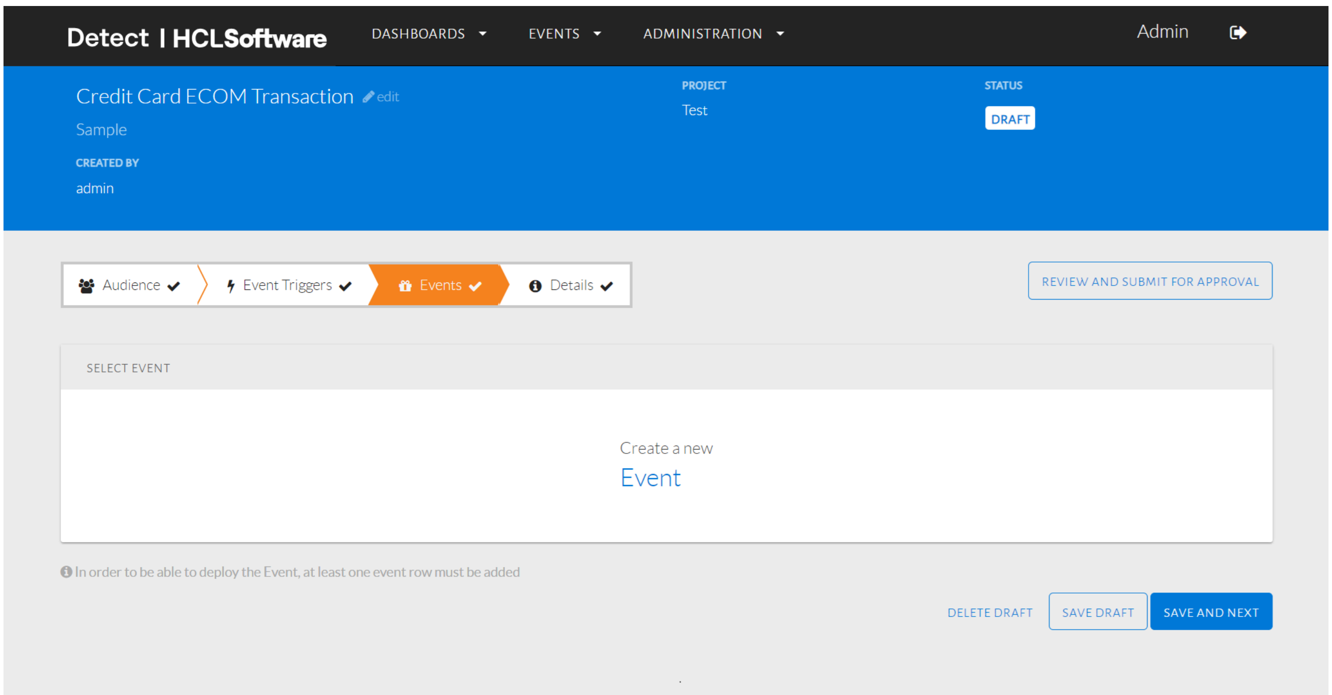
At this point, only the customers who satisfy both the audience conditions and the trigger conditions will qualify for an event. An in-depth explanation of this selection is available in the section on Audience and Trigger Condition Logic on page 53.

Click Save and Next to proceed. To delete or save the draft, click those options respectively.

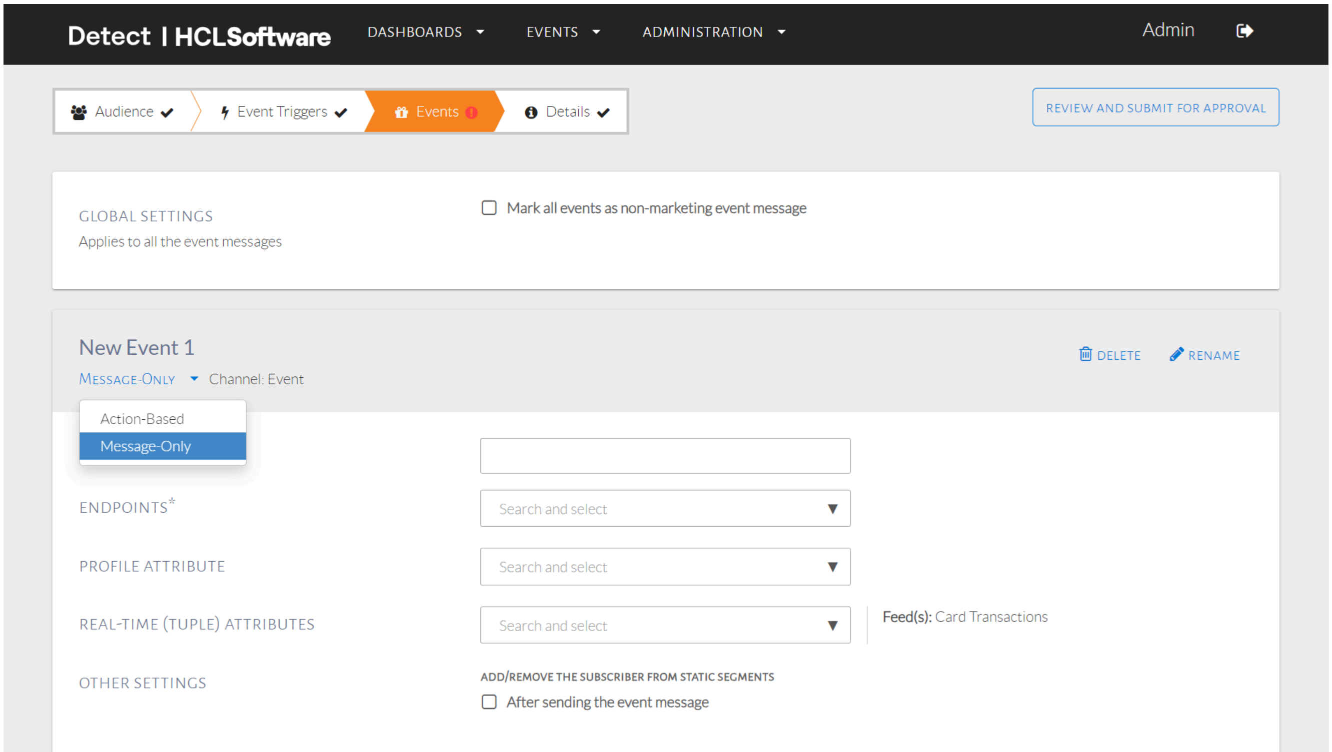
Event

An event can be configured to detect an event based on time, count or amount thresholds on the customers transactions. These are applied once the customer fulfills the audience and trigger conditions. For this sample event, we will detect an event each time the customer fulfills the audience and trigger conditions.

After proceeding from Triggers, a page will be displayed as seen in the image below. Click Event to begin setting up events.

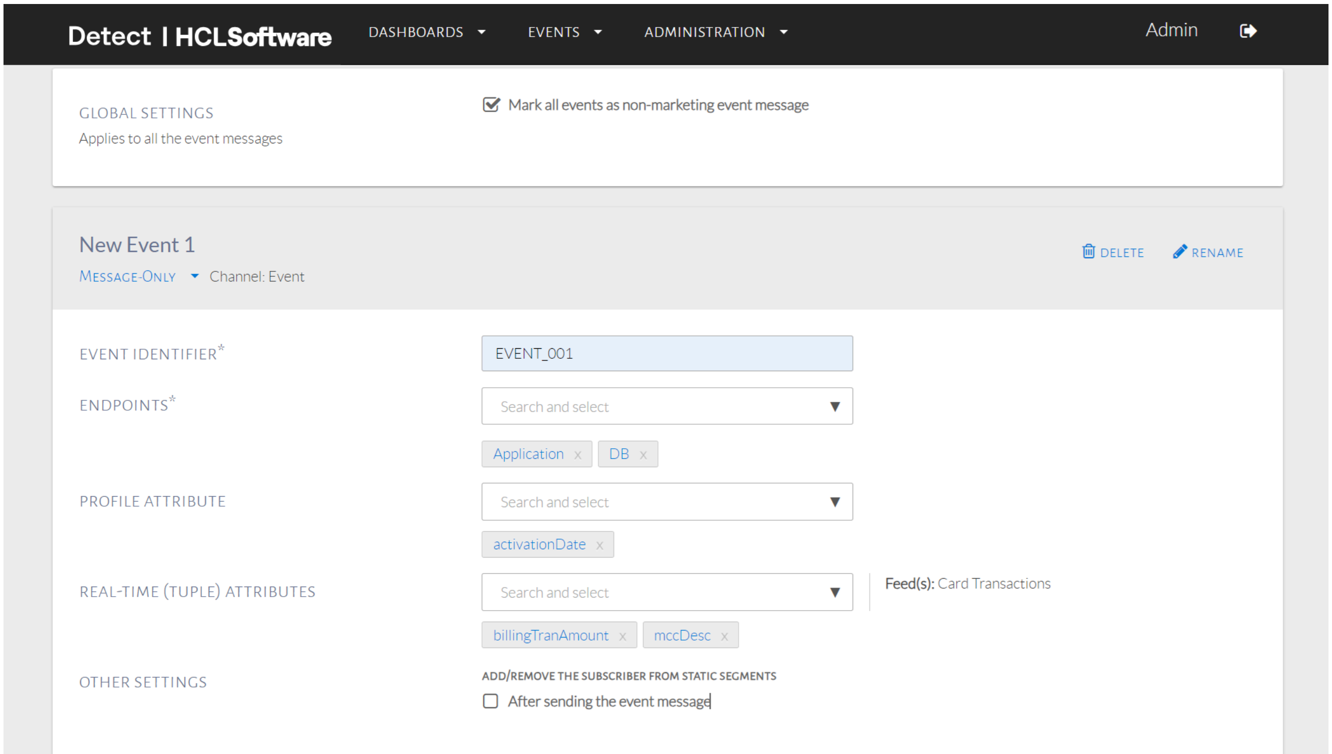


A template of the event will be displayed. The default template shown is a Message-Only event which sends the downstream system a message each time the customer fulfills given conditions. An Action-Based event sends the downstream a message only after the customer also fulfills time, count or amount conditions configured. From the drop-down menu seen in the image below, the user can change the type of event.



The check-box "Mark all events as a non-marketing event message" disables our default global contact policy check. This default is currently set to limit the outgoing events to 50,000 in 1 day, per customer, across all events.

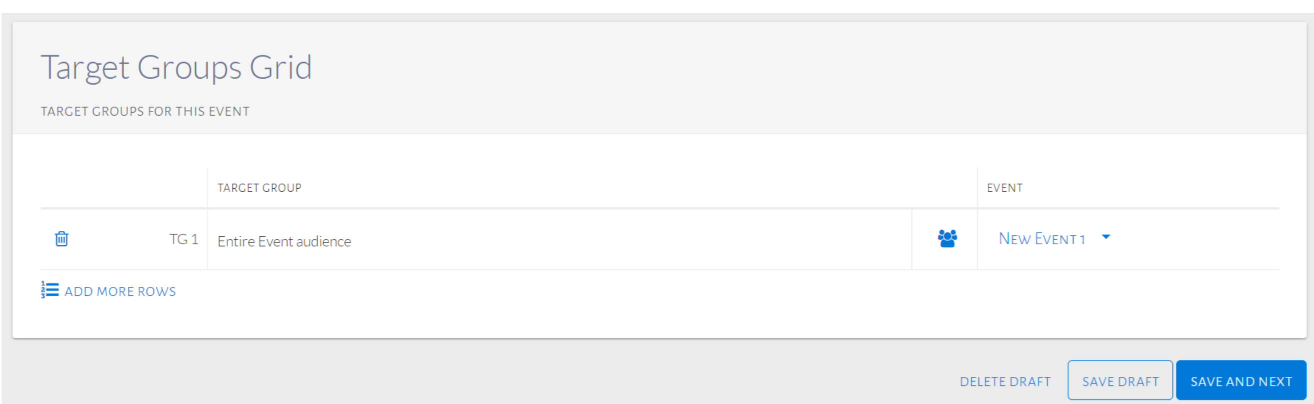
This event requires a Message-Only event. The template for this is shown in the image below.



Populate all fields with an asterisk, as they are mandatory. Fill up the Event ID to correspond with events configured in the downstream system. Downstream systems can be selected as Application (for real-time events) or DB (for batch events). Profile attributes, which represent data specific to a customer, can be added to the message also. Profile & real-time attributes can be selected based on the event & offer. For example, if the offer differs by card used by the customer during the transaction, cardDescription can be selected to forward to the downstream system. Recommended attributes include email address and phone number.

Another event can also be added by clicking Add New Event. However, this example will only make use of one.

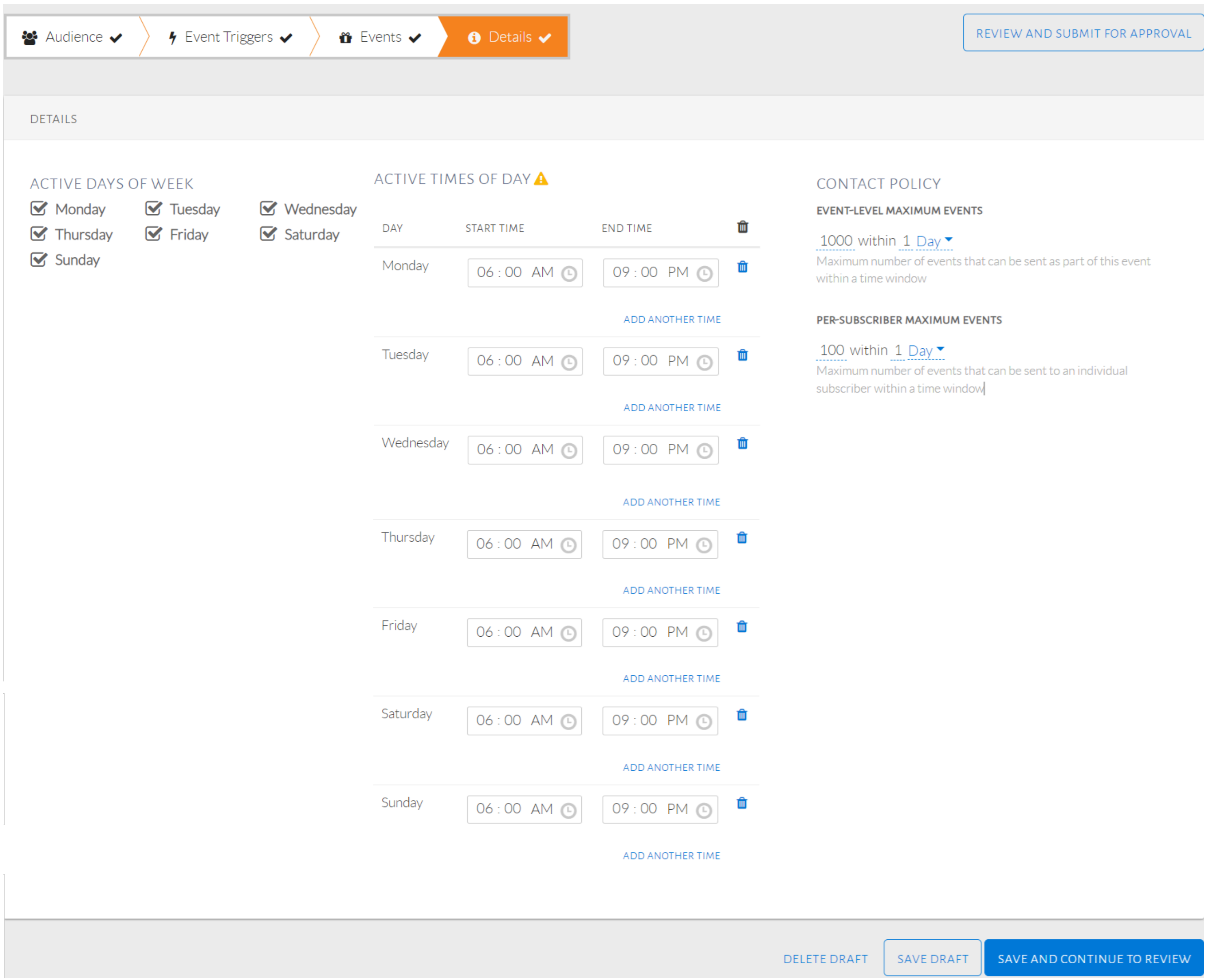
In the Target Groups Grid, the user can divide the customers who qualified for the event into groups called Target Groups. These groups contain customers with specific criteria, which can be set by clicking the orange icon on the right in the image below.



Click Save and Next to proceed. To delete or save the draft, click those options respectively.

Details

After proceeding from Events, a page will be displayed as seen in the image below where event details can be set.



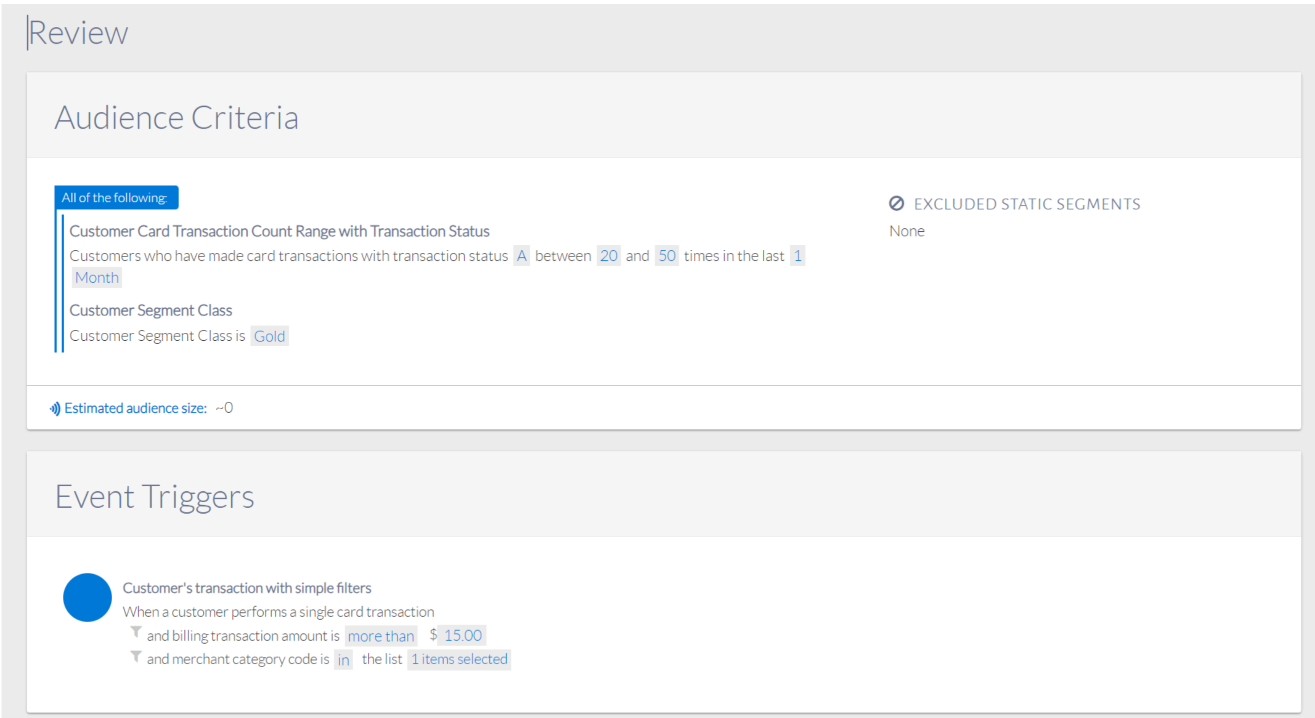
Active Days of Week and Active Times of Day specify the schedule of the event. These define the days and times the events are scheduled to be detected. A shortcut to replicating the same time for each day is to first select one day and set the time window, and subsequently select the rest of the days to see this replicated across all selected days.

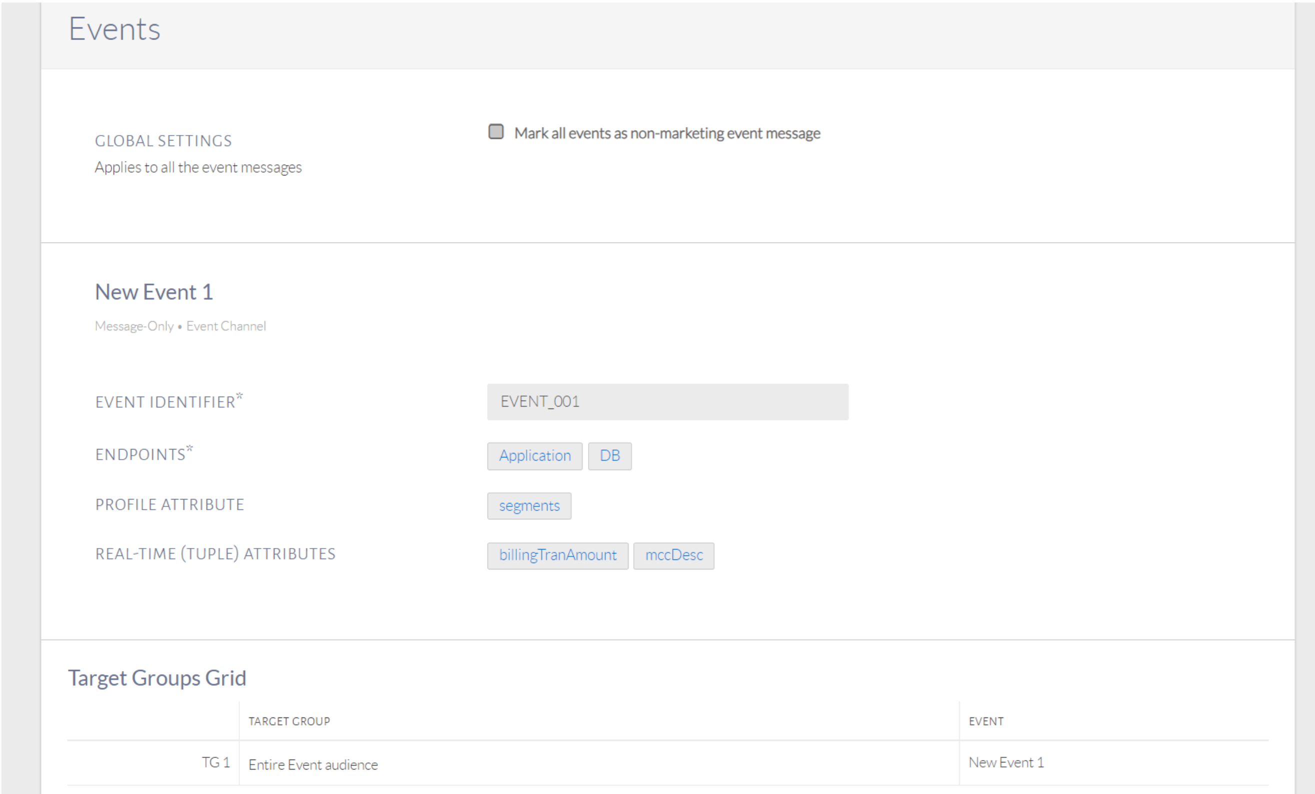
Contact Policy is the maximum number of events that can be detected. Under this, Event-Level Maximum Events contains the maximum number of total events that can be detected within a time window. The Per-subscriber Maximum Events is the maximum number of events that can be detected for an individual customer within a given time window.

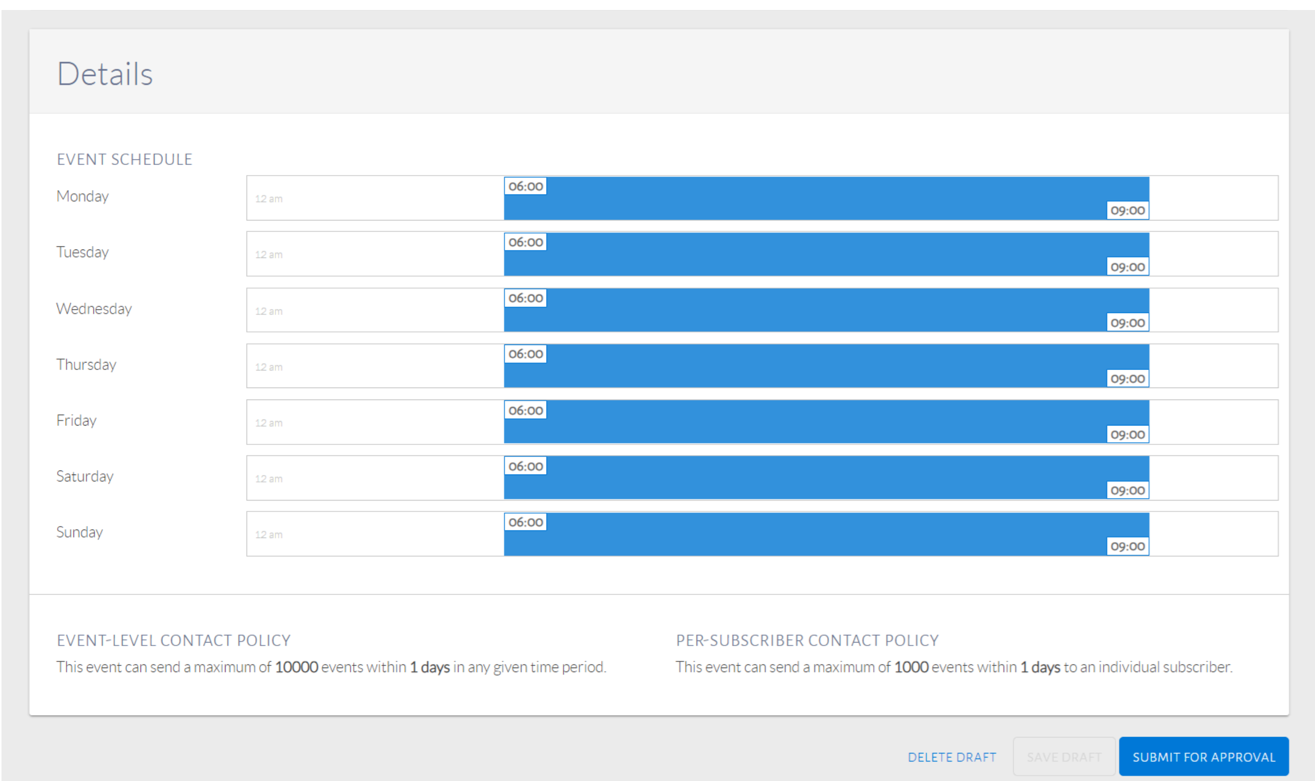
The event should always be set up as seen in the image above so that we do not limit the events sent to the downstream in any way. Contact Policy is limited at their end as well, therefore a very high number should be entered so as not to limit events detected by Detect. Click Save and Continue to Review to proceed.

Review Event

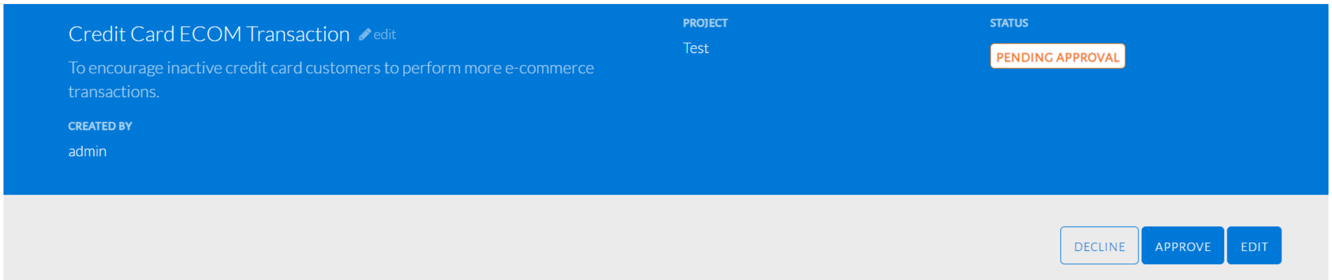
After proceeding from Details, a page will be displayed where the Audience, Triggers, Events and Details of the event can be reviewed. The images below show this.



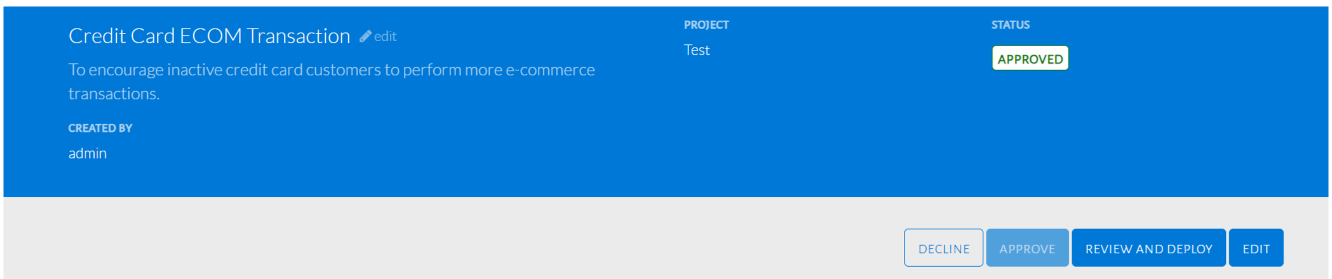

Events
GLOBAL SETTINGS
Applies to all the event messages
Mark all events as non-marketing event message
New Event 1
Message-Only • Event Channel
EVENT IDENTIFIER*
EVENT_001
ENDPOINTS*
Application
DB
PROFILE ATTRIBUTE
segments
REAL-TIME (TUPLE) ATTRIBUTES
billingTranAmount
mccDesc
Target Groups Grid
TARGET GROUP
EVENT
TG 1
Entire Event audience
New Event 1


Details
EVENT SCHEDULE
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Sunday
12 am
06:00
09:00
EVENT-LEVEL CONTACT POLICY
This event can send a maximum of 10000 events within 1 days in any given time period.
PER-SUBSCRIBER CONTACT POLICY
This event can send a maximum of 1000 events within 1 days to an individual subscriber.
DELETE DRAFT
SAVE DRAFT
SUBMIT FOR APPROVAL

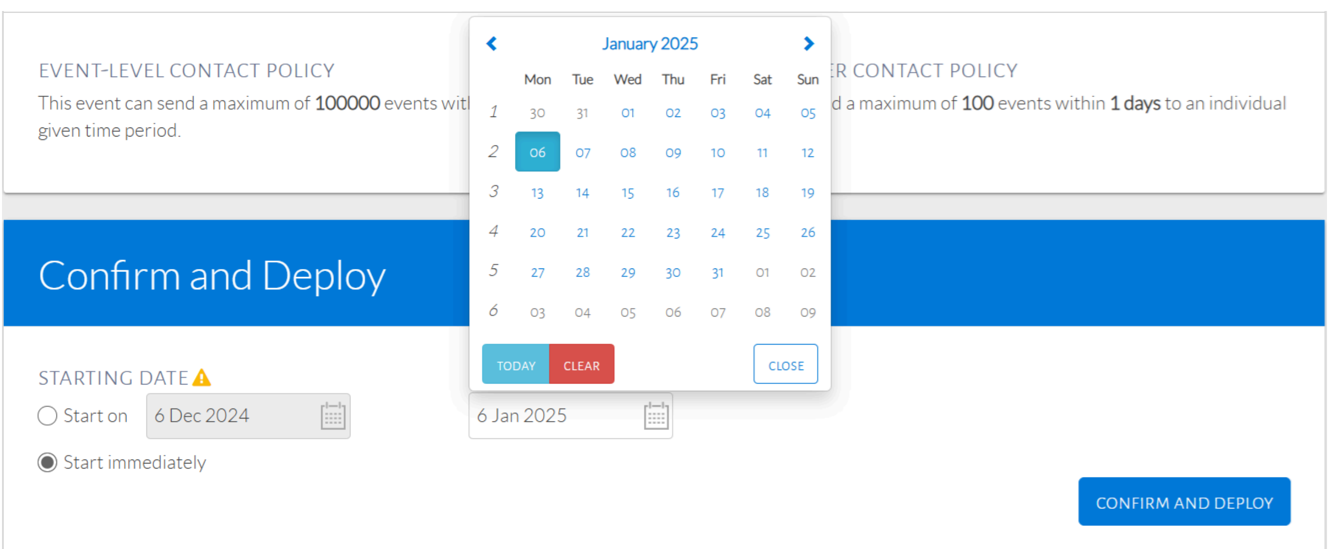
Once the event is edited and reviewed, Submit for Approval. This will usually be done from a Makers account. The image below shows the status once submitted, from a Checkers account. This will allow a Checker (or Admin) to review the event.



A Checker can decline the event allowing the Maker to make any required changes and resubmit the event. Once the event is approved, the image below shows the status change.



The Checker can then select Review and Deploy and choose a time period before deploying the event. The image below shows this option.



The figure above shows the date selection available upon clicking the calendar icon. Choose the Starting Date of the event, which is the date it will begin running and Ending Date, which is the date it will stop. The minimum duration for this event should be a week.

Click Confirm and Deploy to deploy the event. Deploying the event will change the event status to Running can be found under said tab on the Events page.

Event Approval and Deployment

This page explains the approval process for events created by users (Makers) and reviewed by authorized approvers (Checkers), detailing each role's permissions and steps for submitting, reviewing, approving, or declining events.

Events created by users require approval before deployment. This process involves two roles:

- **Maker** – Creates and submits the event.
- **Checker** – Reviews, approves, or declines the event, and manages deployment.

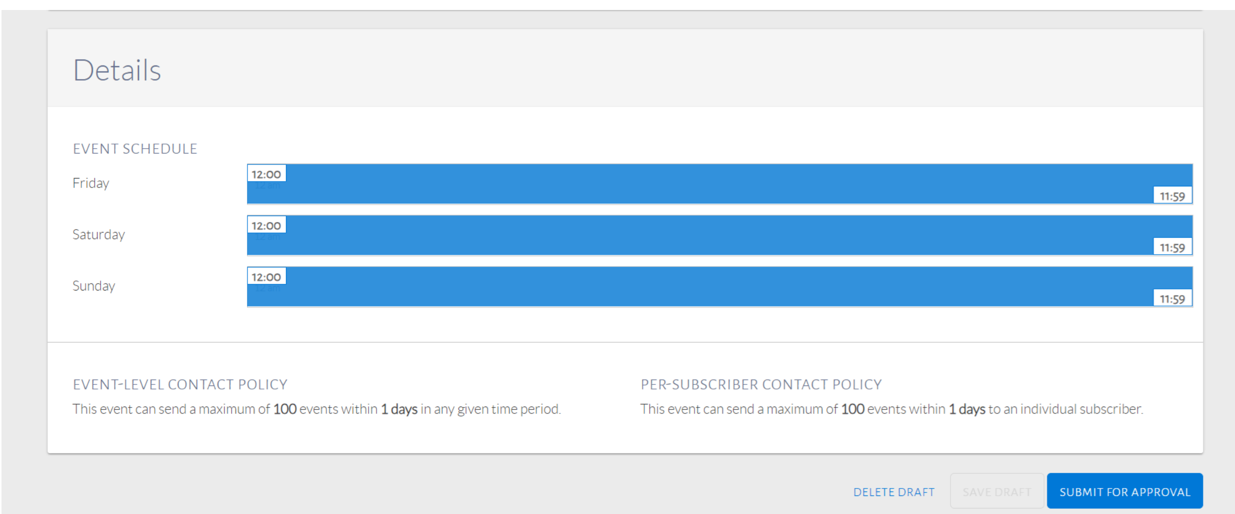
Maker Role

A maker is a user with the permissions to:

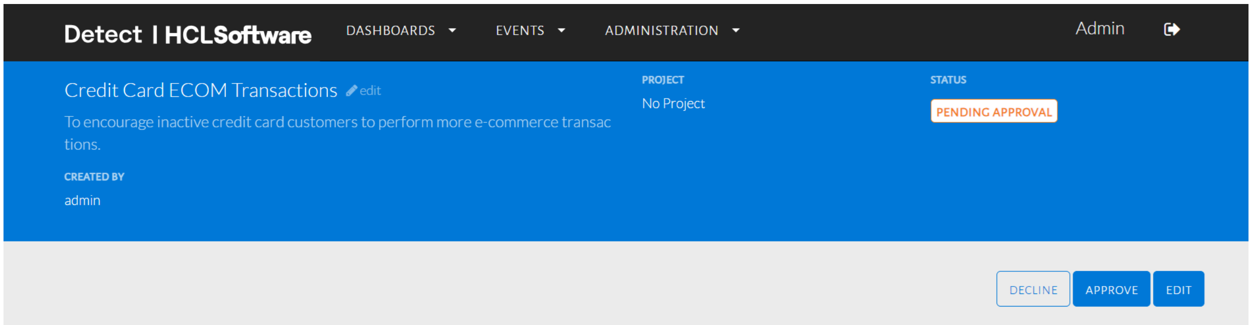
- Create and edit events.
- Submit any event (their own or others') for approval.
- Edit declined events and resubmit.

Submit an Event

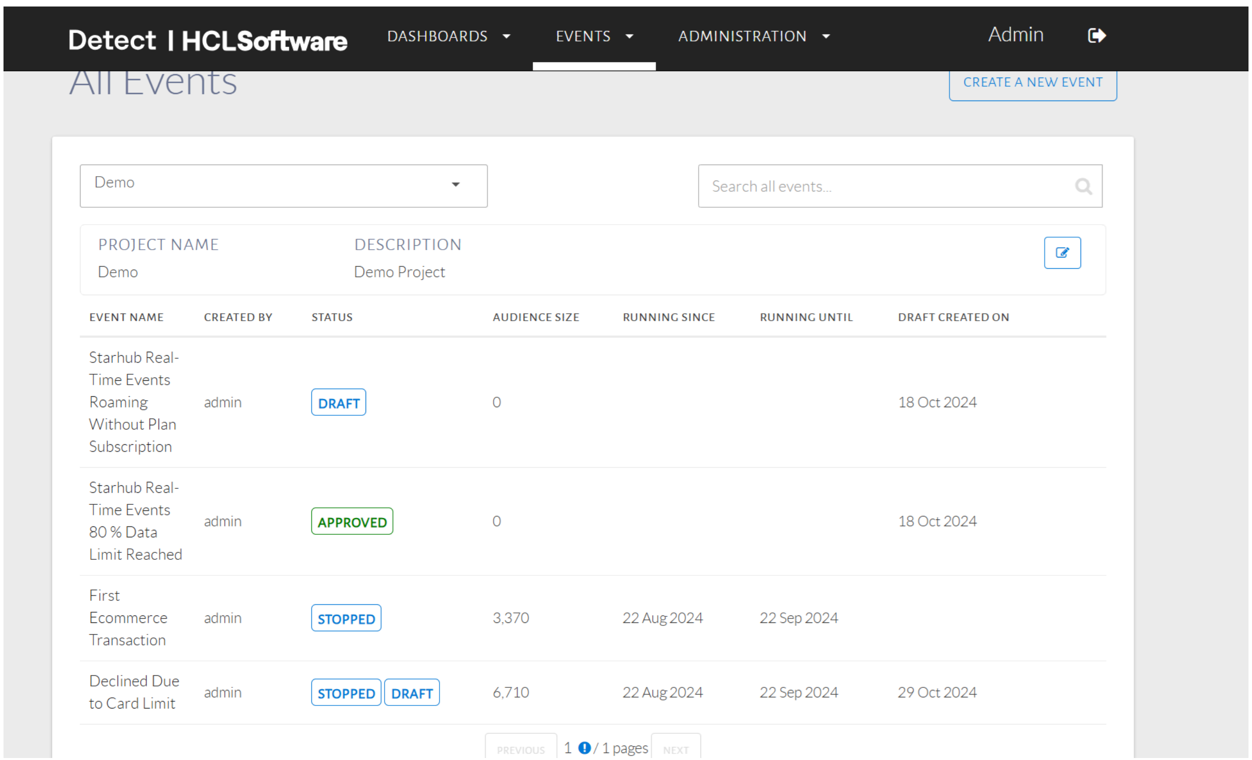
1. After reviewing the event setup, click **Submit for Approval**.



2. Event status changes to **Pending Approval**.



3. Navigate to **My Events > Pending**:
    - If **approved**, it moves to **Running** tab after deployment.
    - If **declined**, status updates to **Declined**, and event can be edited and resubmitted.

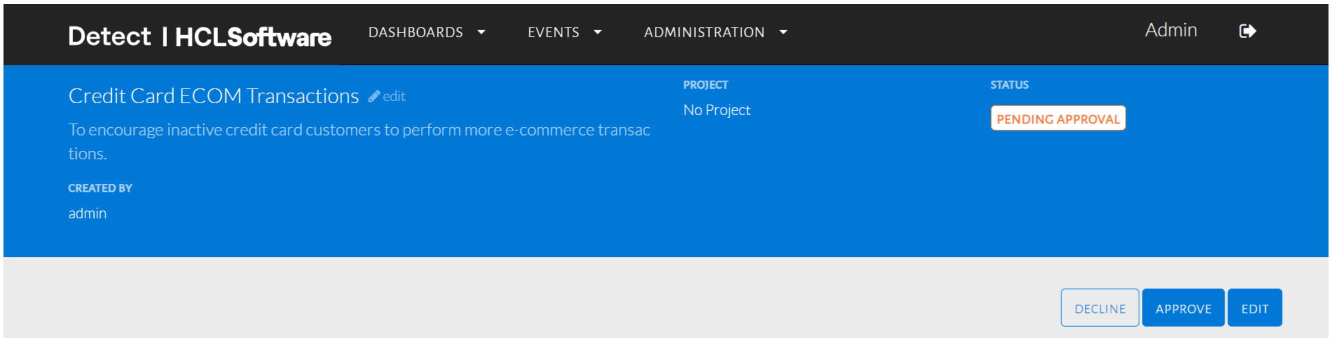


Example: A maker creates a campaign for “Inactive premium users” and submits it for approval. Upon decline, they revise the audience criteria and resubmit.

Checker Role

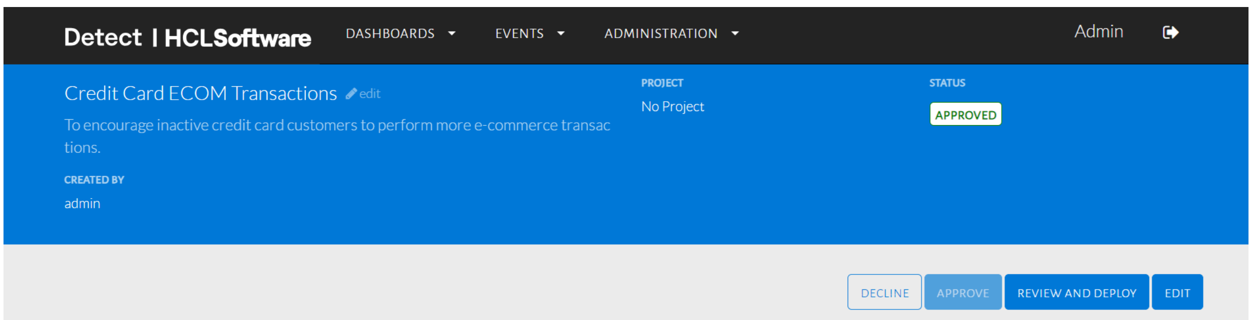
The checker has permissions to:

- view events under **Events by Others > Pending**.
- **approve**, **decline**, or **deploy** submitted events.
- create events, same as a maker.

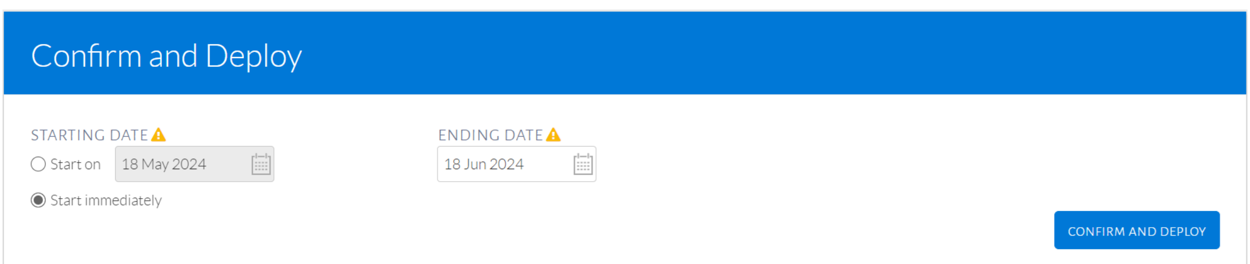


Approve and Deploy

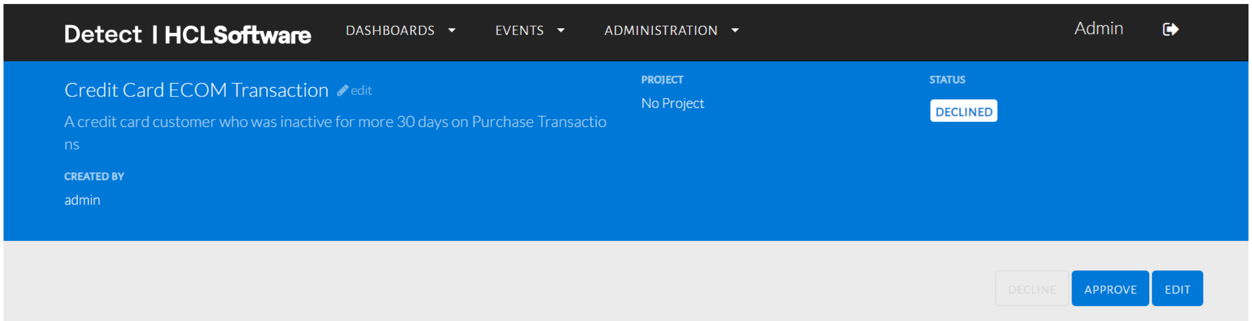
1. Select an event under **Pending** tab.
2. Click **Review** to inspect full configuration.
3. Click **Approve**, then choose **Review and Deploy**.



4. Select event **start and end dates**.
5. Click **Confirm and Deploy** to make it active.



6. Decline Event (if needed): Click **Decline** and provide reason.



7. Event status updates to **Declined**, allowing maker to revise and resubmit. Example: A checker reviews a draft for a "Referral bonus campaign," updates the start date, and deploys it. If declined, feedback is shared with the maker for correction.

Note:

- Only **approved** events can be deployed.
- Checkers can also act as makers and follow identical steps for event creation.
- Makers can view all their events across statuses under the **My Events** tabs.

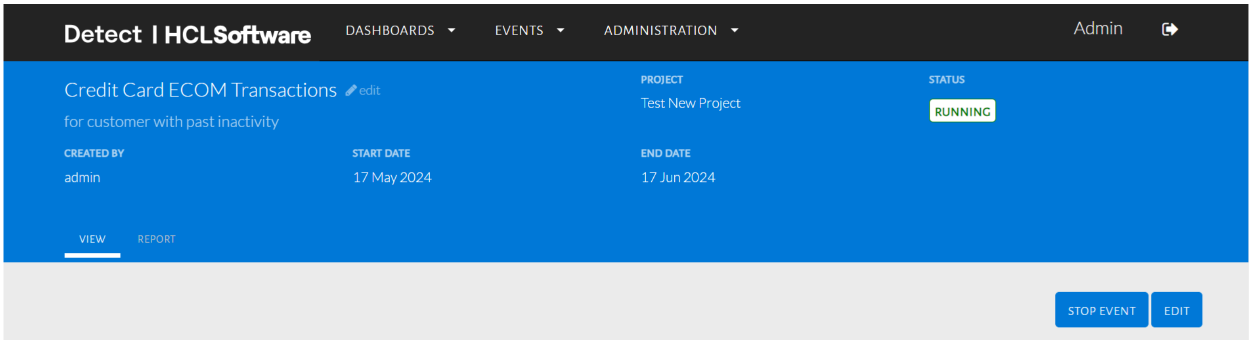
Editing an Event

This page explains how users can edit a running event by creating a draft version. The original event continues to run until the updated draft is deployed.

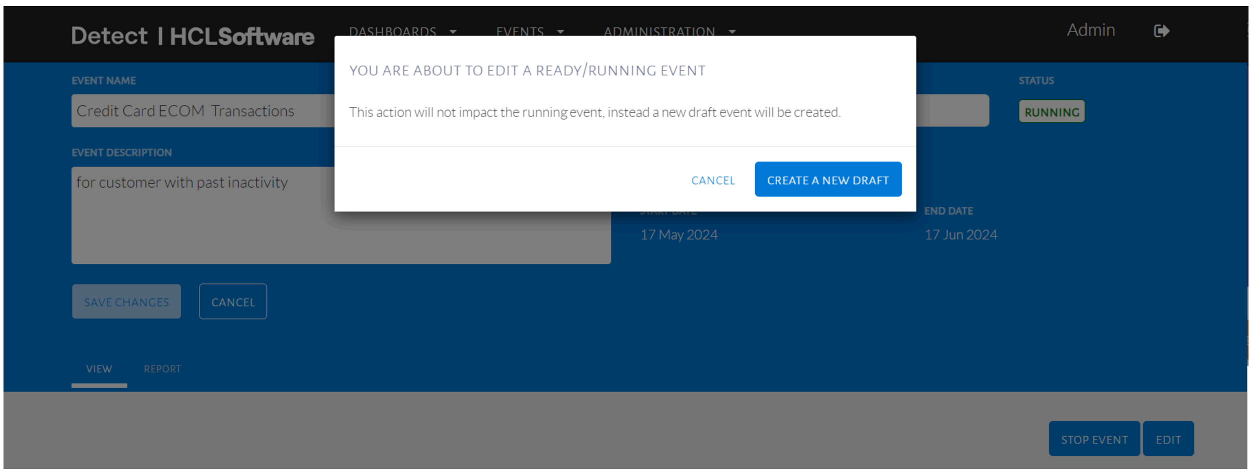
Editing a running event does **not** directly modify the live version. Instead, a **new draft** is created for editing. Once finalized and deployed, the draft replaces the existing running event.

Edit a Running Event

1. Click on the **Events** tab in the top navigation bar.
2. Select **All Events**.
3. From the list of events, choose one in **Running** status.
4. Click on the event name to open the event detail view.
5. On the top-right of the event detail page, click the **Edit** button.

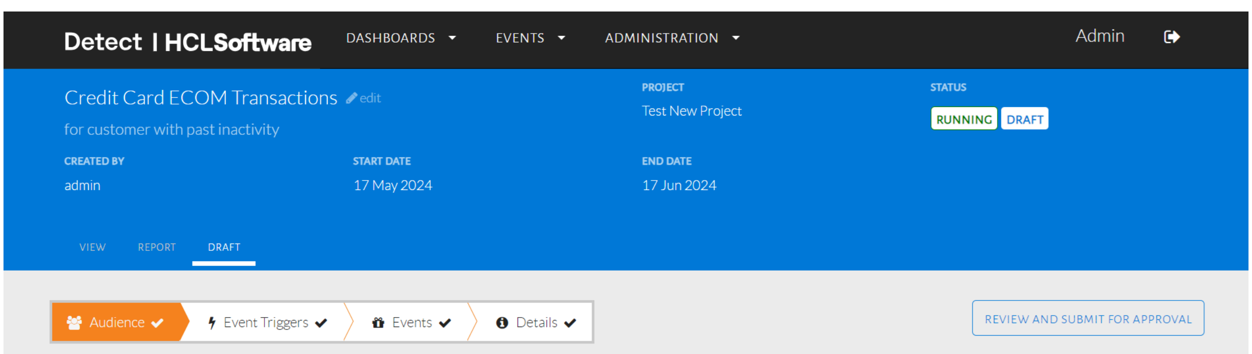


6. A pop-up appears notifying you that a **new draft** will be created.



7. Click **Create New Draft** to proceed.

8. A new **Draft** tab appears under the event, where edits can be made.



9. The status of this version will be shown as **Draft**.

📌 *Example: Edit a running event for "Cart abandonment retargeting" to change the audience from 7-day inactivity to 3-day inactivity.*

Important:

- Original running event remains **unaffected** until the new draft is deployed.
- Only one draft can be active per event at a time.
- Deployment will overwrite the existing running version.

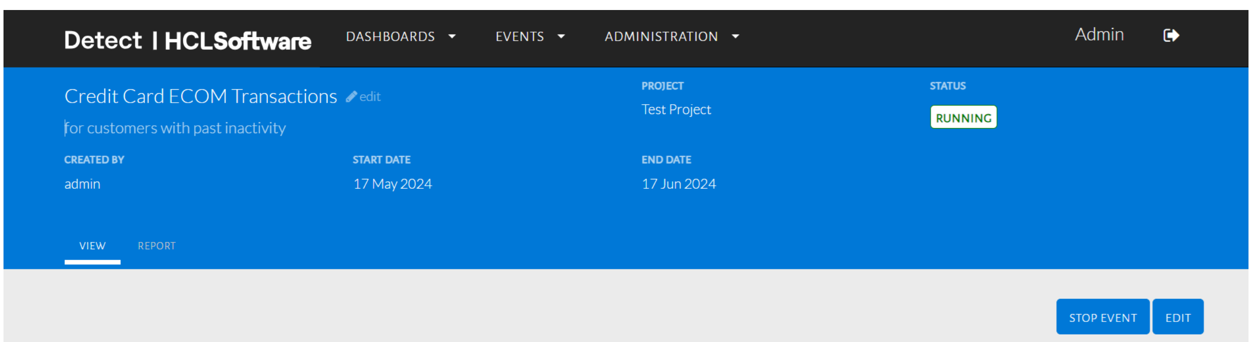
Stopping an Event

This page explains how users can manually stop an event that is currently running, before its scheduled end date. It also highlights how stopped events can be restarted later with changes.

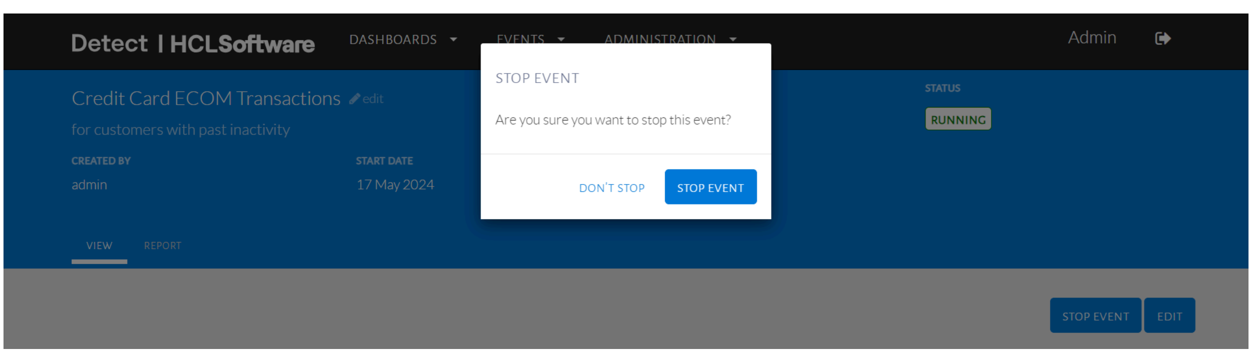
Users have the ability to stop any **running event** before it completes its duration. Once stopped, the event status changes to **Stopped**, and it appears under the respective tab. Stopped events can be edited and restarted later if needed.

Stop an Event

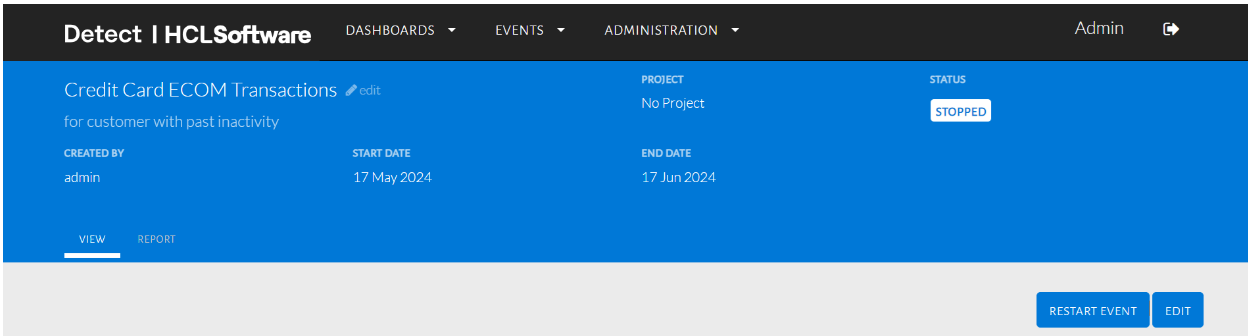
1. Go to the **Events** tab from the top navigation bar, and select **All Events**.
2. From the list, choose the event currently in **Running** status.
3. Click on the event name to open the event details page.
4. On the top-right corner of the event detail page, click the **Stop** button.



5. A confirmation pop-up will appear asking you to confirm the action.



6. Click **Confirm** to proceed.



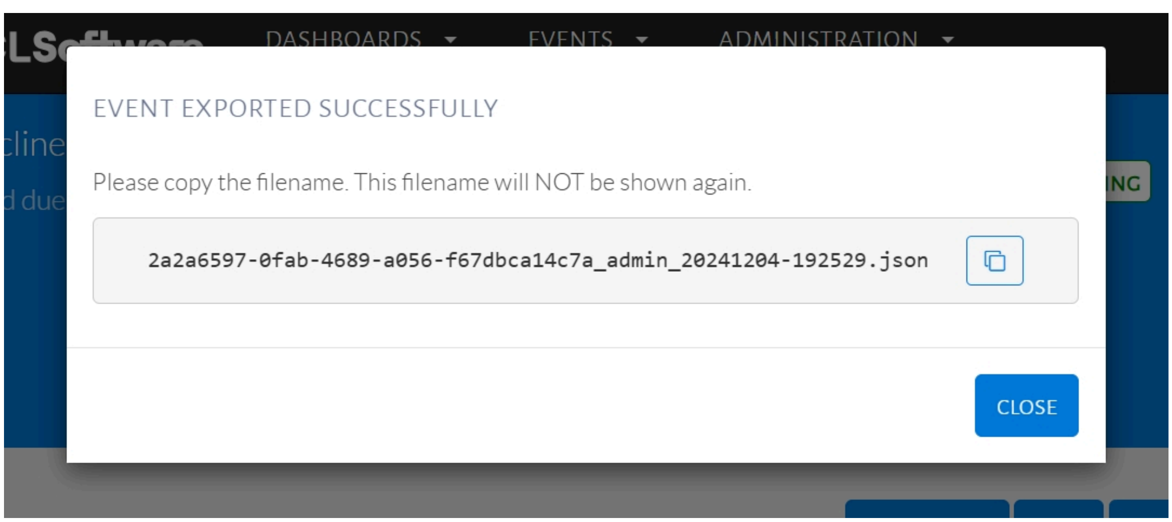
Exporting an Event

This section explains how to export deployed events either as reusable templates or server-stored files for easy replication or migration across environments.

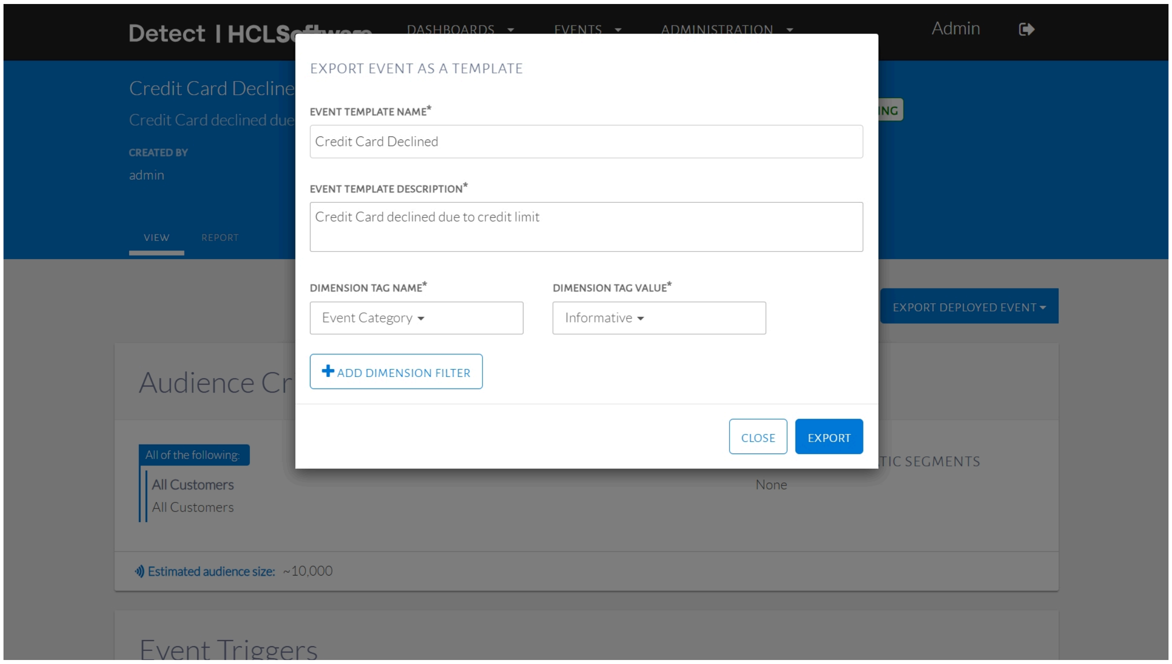
You can export the existing deployed events either to your server instance or as template. By exporting events, you can create reusable templates to replicate similar events effortlessly without starting from scratch or generate server-stored files for seamless transfer of events between environments with the same application configuration.

To export the events, follow the steps below:

1. Click **Events** > **All Events**.
2. Select a deployed event.
3. In the **View** tab, click **EXPORT DEPLOYED EVENT**.
4. Select one of the following options:
    a. **VIA FILE**: To export the existing event as file in the server instance. Click **OK** in the confirmation popup, and copy the file name for further usage. The exported event .json file will be stored in the "*<Installation_Location>/Instance_Home/export*" server location. A popup with file name is shown as below.



b. **VIA TEMPLATE**: To export the existing event as a template. If this option is selected, enter Template name and description. Also, make sure to select the dimension tag and value as shown below.



5. Click **Export**. As a result, the deployed event will be stored in the server instance and displays the file if the **VIA FILE** option is selected and will be listed as template if the **VIA TEMPLATE** option is selected.

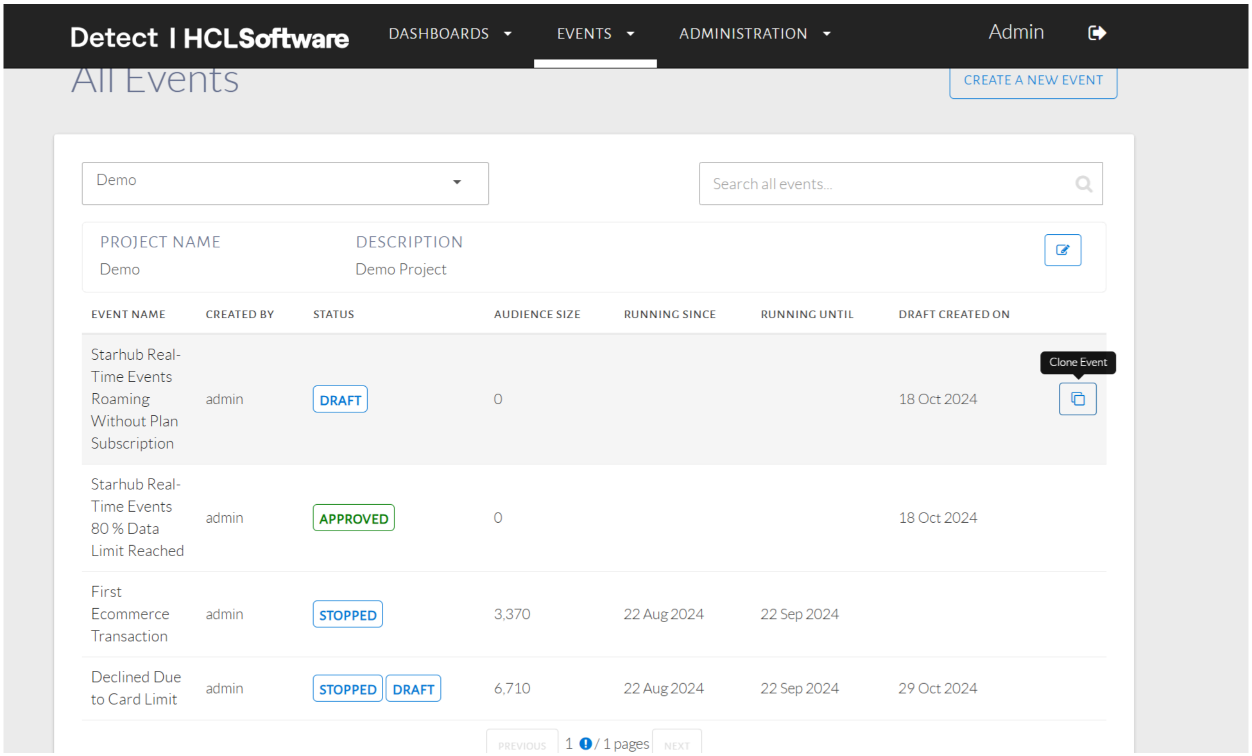
Cloning an Event

This page explains how users can duplicate an existing event of any status, modify it, and save it as a new draft for further editing and submission.

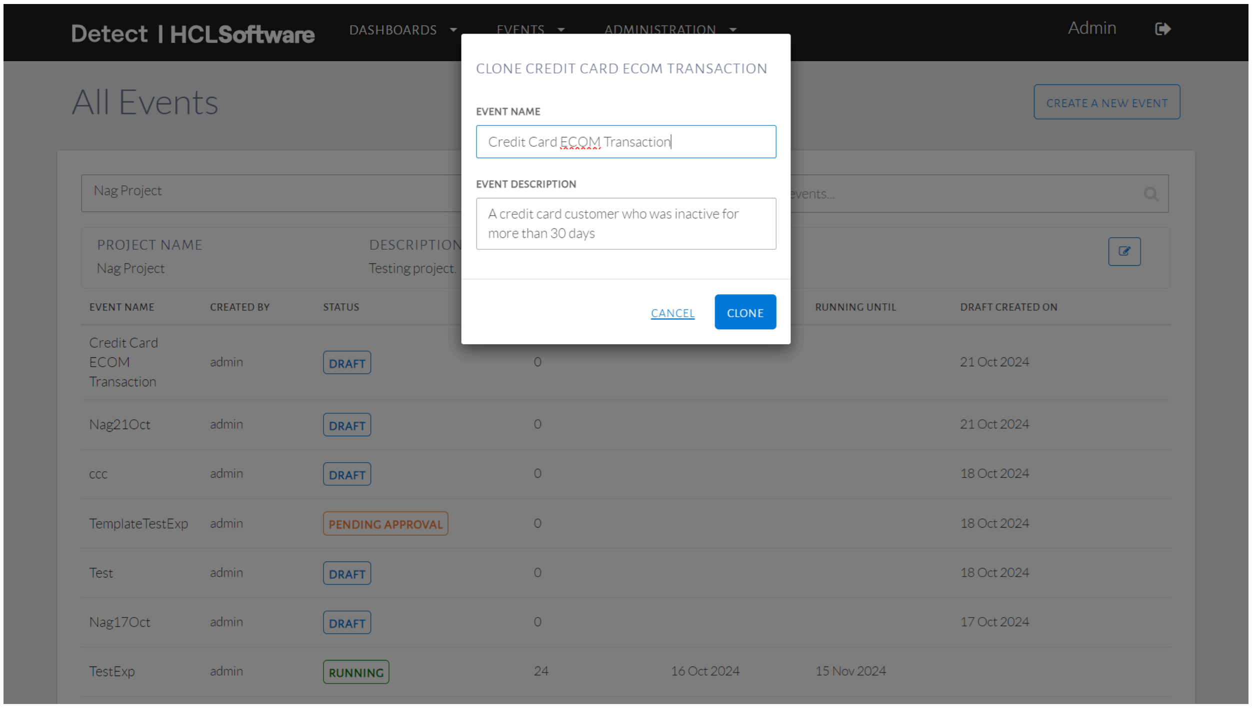
Users can clone existing events—regardless of their status or creator—and edit them as their own. The cloned event becomes a draft, allowing the user to make necessary changes before submitting it for approval or deployment.

Clone an Event

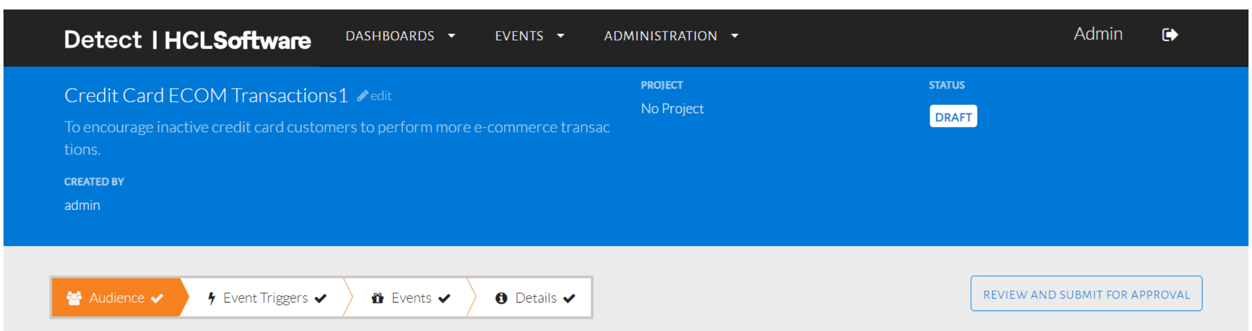
1. Navigate to the **Events** section using the top navigation bar.



2. Click on **All Events**.
3. From **My Events** or **Events by Others**, hover over any event.
4. Click on the **Clone Event** icon (two-document symbol).



5. A pop-up window appears for you to update the **Event Name** and **Description**.



6. Ensure the event name is **unique**—an error will appear if it already exists. *Example: Clone an event targeting “Promo-based churn users” and rename it to focus on “Loyalty program engagement.”*
7. After editing, click **Clone**. The cloned event will appear under **Drafts**.
8. You can edit it like any other draft, including selecting a new project if needed (project is not copied).

Important:

- Any event can be cloned—regardless of its status or the original user who created it.
- Only event details are cloned; associated projects must be manually selected.

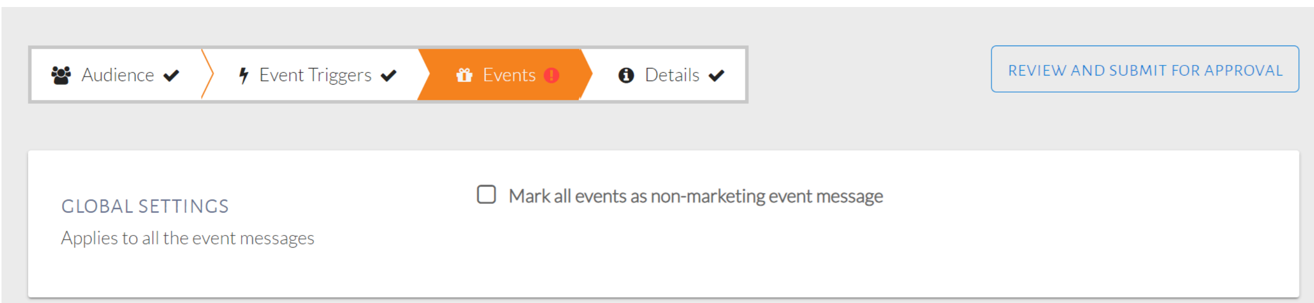
Chapter 5. Additional Options for Events

This section describes additional options for events that were not covered in the previous sections.

Event Types

There are two event types to choose from: Message-Only & Action-Based. Both events require an Event ID and Endpoint to be selected. Additionally, the UI allows attributes from each data source to be selected which is forwarded to the chosen endpoint. For all events, we suggest selecting customer first/last name, email ID, phone number, and all relevant channel information (push note, email and text message) with their preference flags from the customer profile with customer ID (custID) and transaction date time (sysDateTime) from real-time attributes.

The check-box "Mark all events as a non-marketing event message" disables our default global contact policy check. This default is currently set to limit the outgoing events to 50,000 in 1 day, per customer, across all events. There is also an event level contact policy that can be configured in the Details tab.

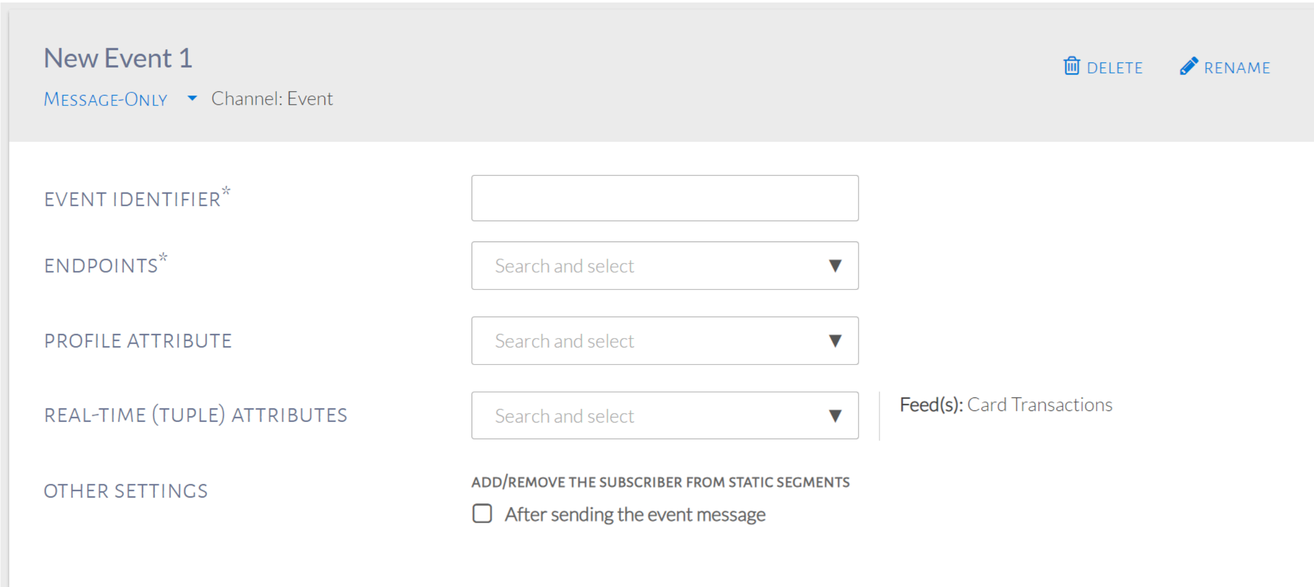


Global event settings

In order to better understand each event option, we will explore different use-cases as we have done above.

Message-Only Events

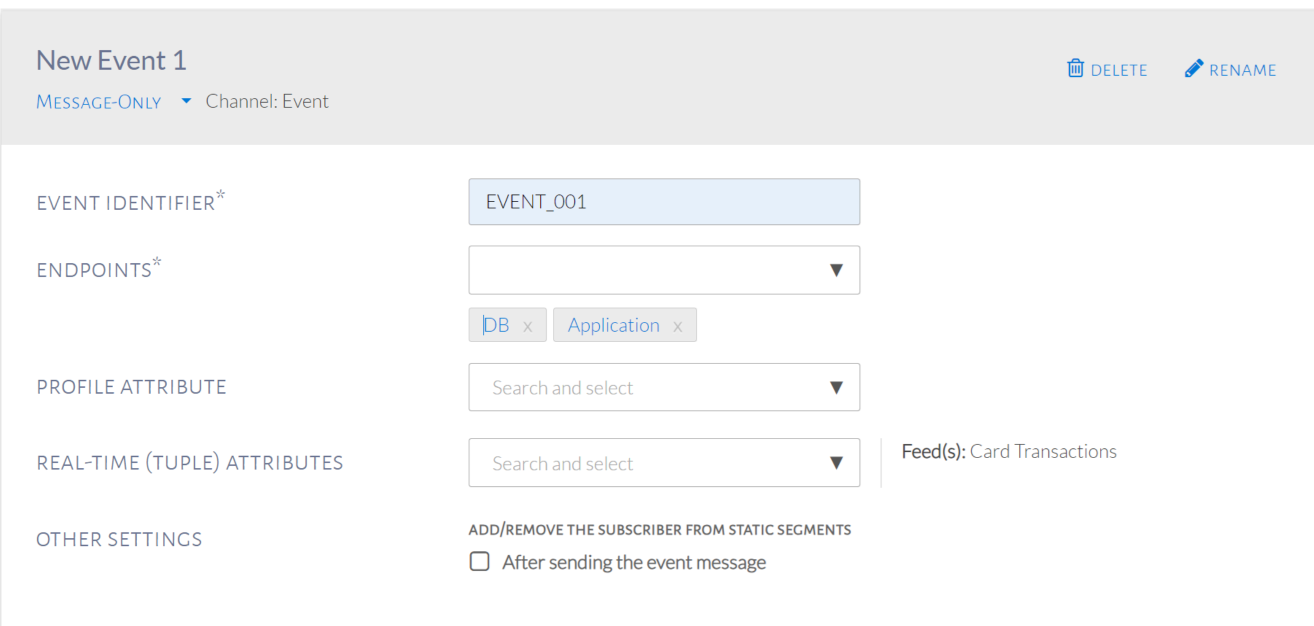
Message-Only events are used when an event needs to be sent out each time audience & trigger conditions are met. This is the default selection in the Events tab. Inputs to be provided are shown in the image below. Mandatory fields are marked with an asterisk in the UI, without which the user cannot progress.



Message-only event

Event Identifier & Endpoints selection is mandatory. The image below contains a sample event ID. It is important that this ID matches with the one expected by the endpoint systems (Application or DB) so that stitching together events with offers is seamless. Endpoints should be selected

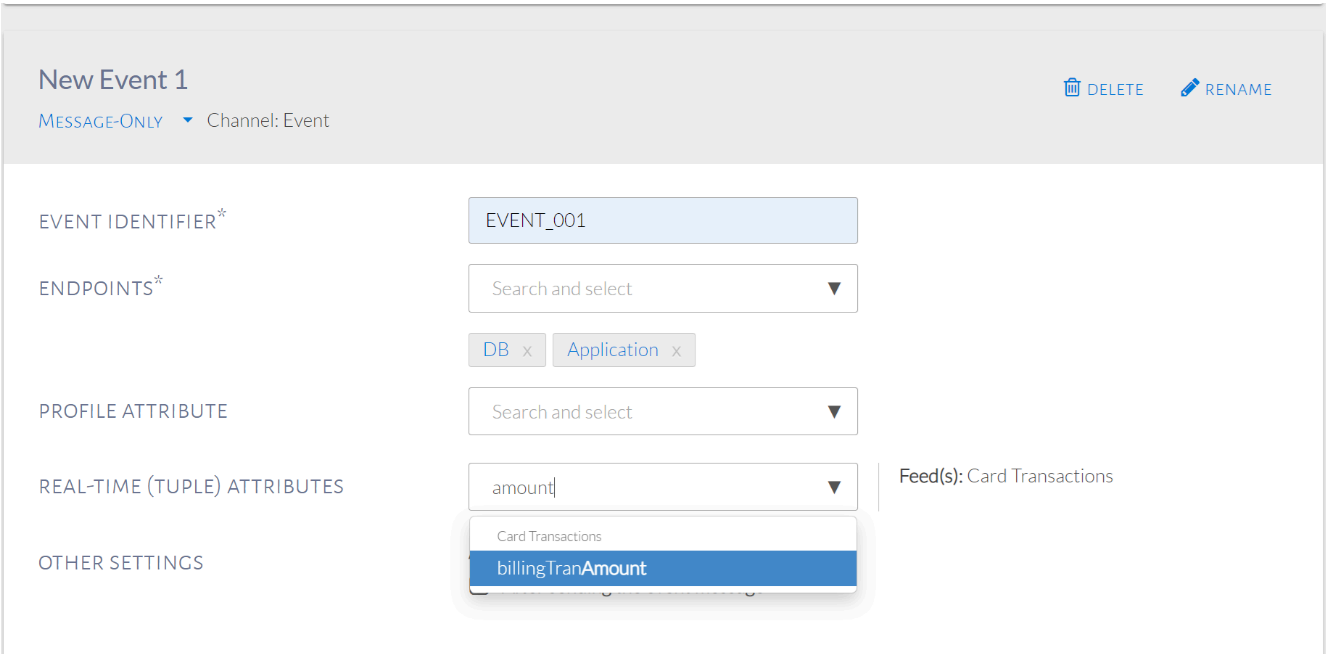
based on if the event is real-time (Application) or batch (DB). Both can be selected as shown in the image below.



Event ID & endpoints selected

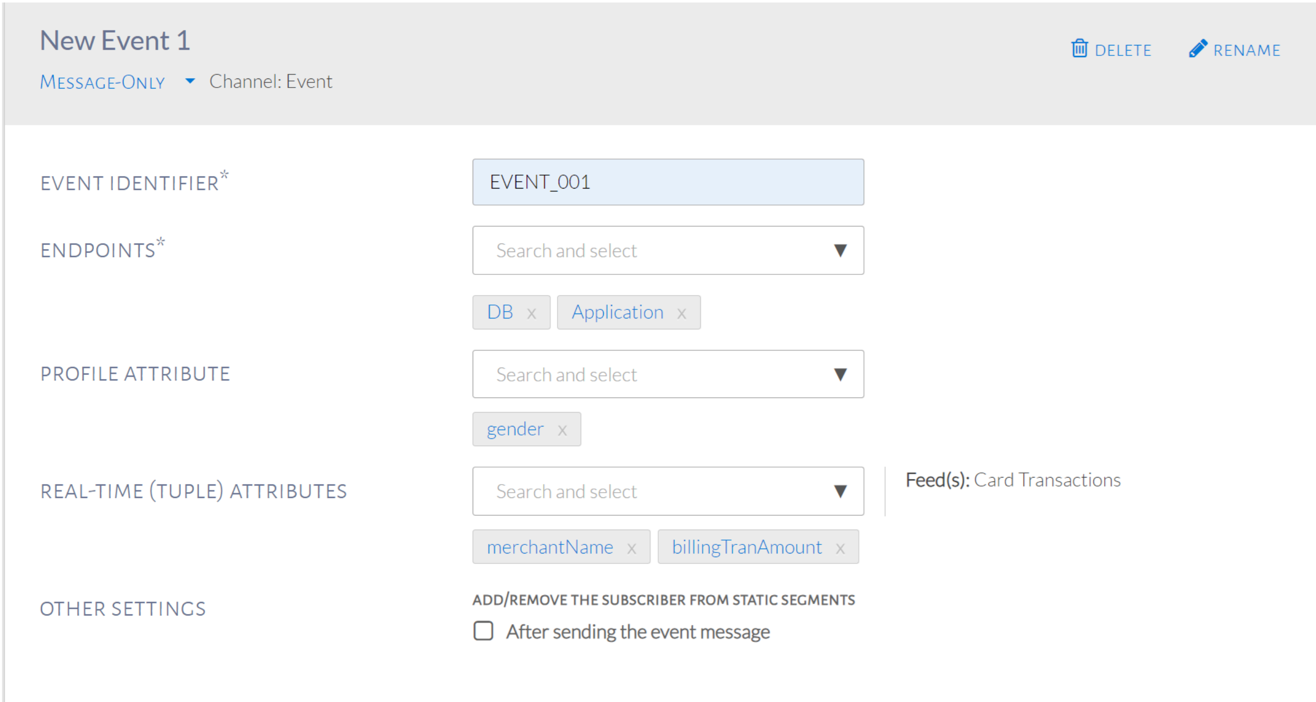
The Profile & Real-time Attributes drop-downs provide all attributes being ingested by either data source to be selected by the user. Multiple attributes can be selected based on what is expected by the downstream systems. For the real-time source, the Feed(s) with attributes present for selection are displayed on the right. Currently, we are only ingesting Credit Card Transactions in real-time.

The image below shows how attributes can be searched for and selected. Continuing our previous use case, with trigger conditions identifying usage of Freshers card for international transactions, we can choose to forward transactionAmount.



Real-time attribute search

Similarly, we can choose to forward profile attributes as well, for offer personalization. Final attributes selected are shown in the image below.



Final event selection

Action-Based Events

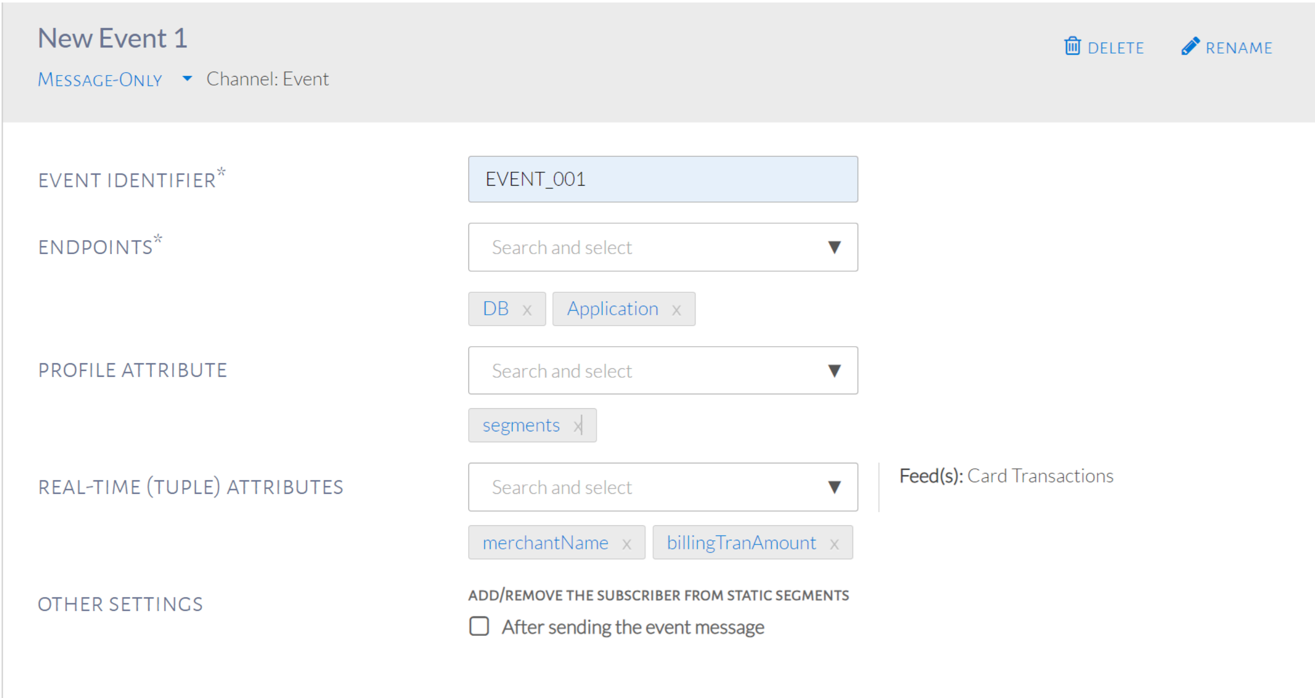
For Action-Based Events, the customer must complete an action to receive the product of an event. Time-based & Milestone-based reminders can be added as well.

USE-CASE: Inform customer that if they spend a total of NT 15,000 on Sports Goods (運動嗜好) within 7 days they will receive a discount on sports goods

Summary of Steps:

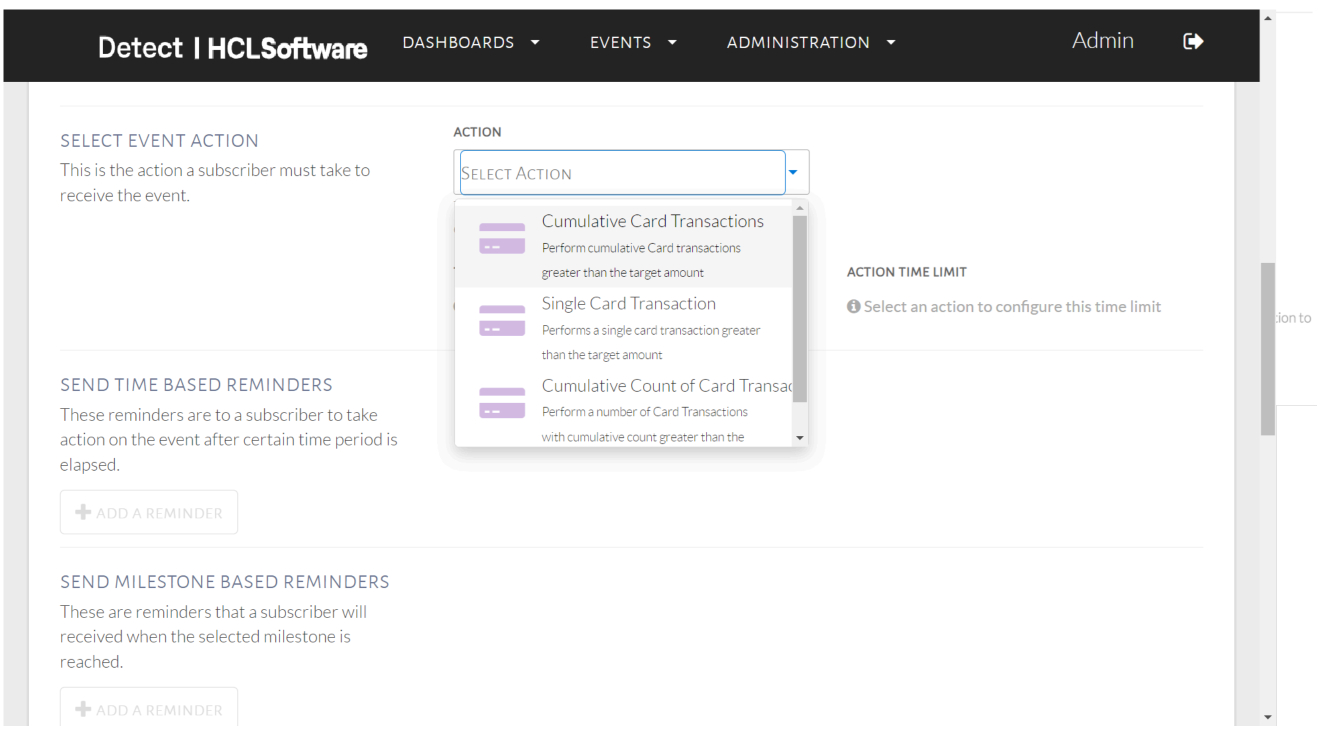
1. From the Events page, select Action-based and fill up general event information.
2. Select Event Action.
3. Fill in the Action details.
4. Set Time-Based Reminders and/or Milestone Reminders.
5. Fill in the Fulfillment Event information.

Select Action-Based as shown in the image below and add in the information as seen in below.



Action-based event

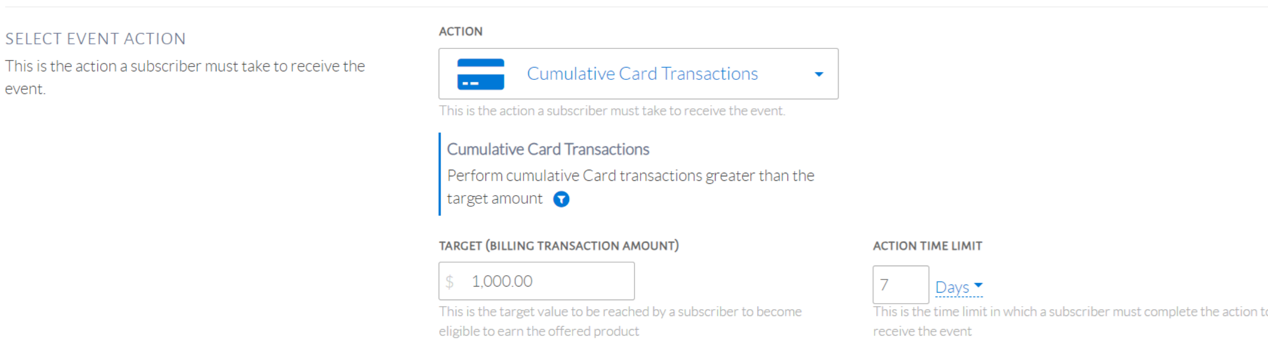
Next, select the desired event action, as seen in the image below. Among the customers qualified for the event, this filter will monitor which customers performed a specified action. For this example, select Cumulative Transaction as we want to monitor the total spend amount in a given time period.



Event action options

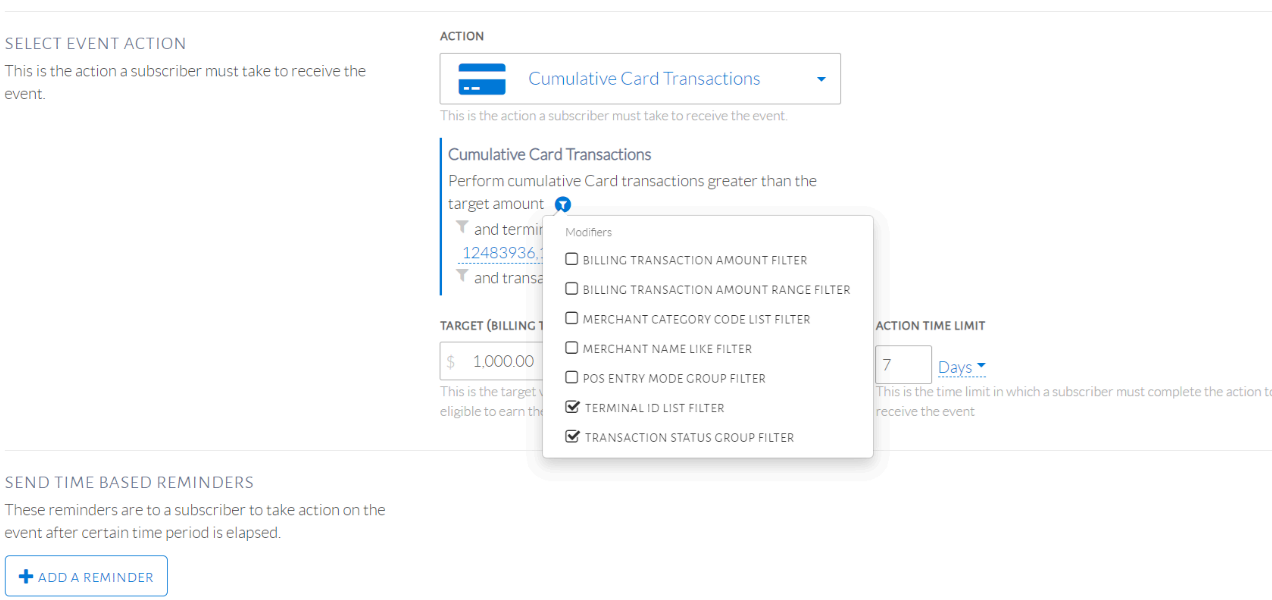
The Single Transaction option will monitor the transaction amount but for a single transaction only, in a given period of time. Cumulative Count of Transactions monitor the number of transactions in a given time period. Do note that for the Cumulative Count option, the threshold does not take into consideration the message that has been sent out the first time a customer fulfills the trigger and audience conditions.

For all selected actions, filters can be added to all of these options as well. Add in the target amount of $15,000 and time limit of 7 days as per our example use case. This is shown in the image below.



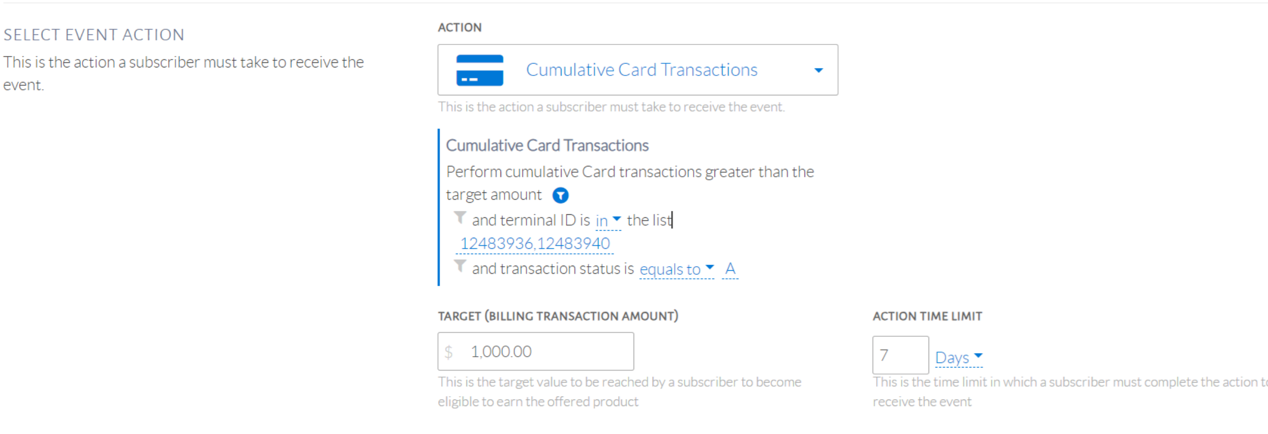
Cumulative transactions

Filters can be implemented as shown in the image below. These are in addition to the audience and trigger configurations and can be modified similarly.



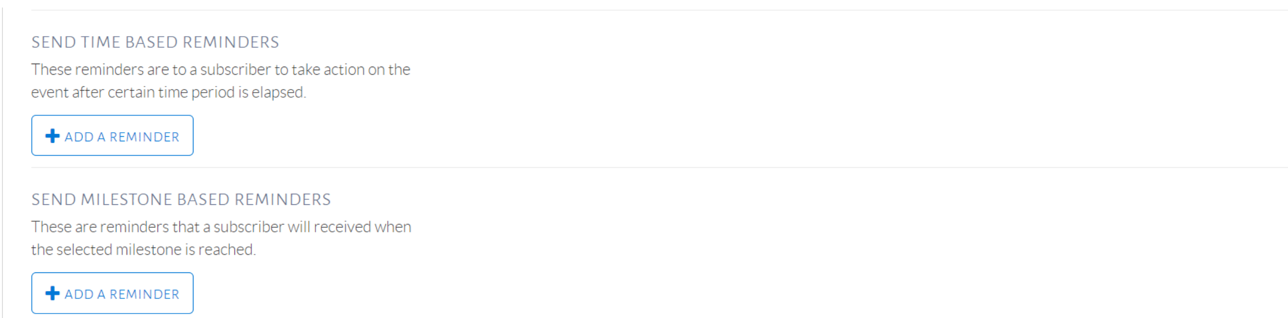
Cumulative transaction filters

Final filter selection shown in the image below. As a result of this setup, the downstream systems will receive a message once the amount and time period conditions are met. The message received is defined in Fulfillment Message, mentioned below after reminders.



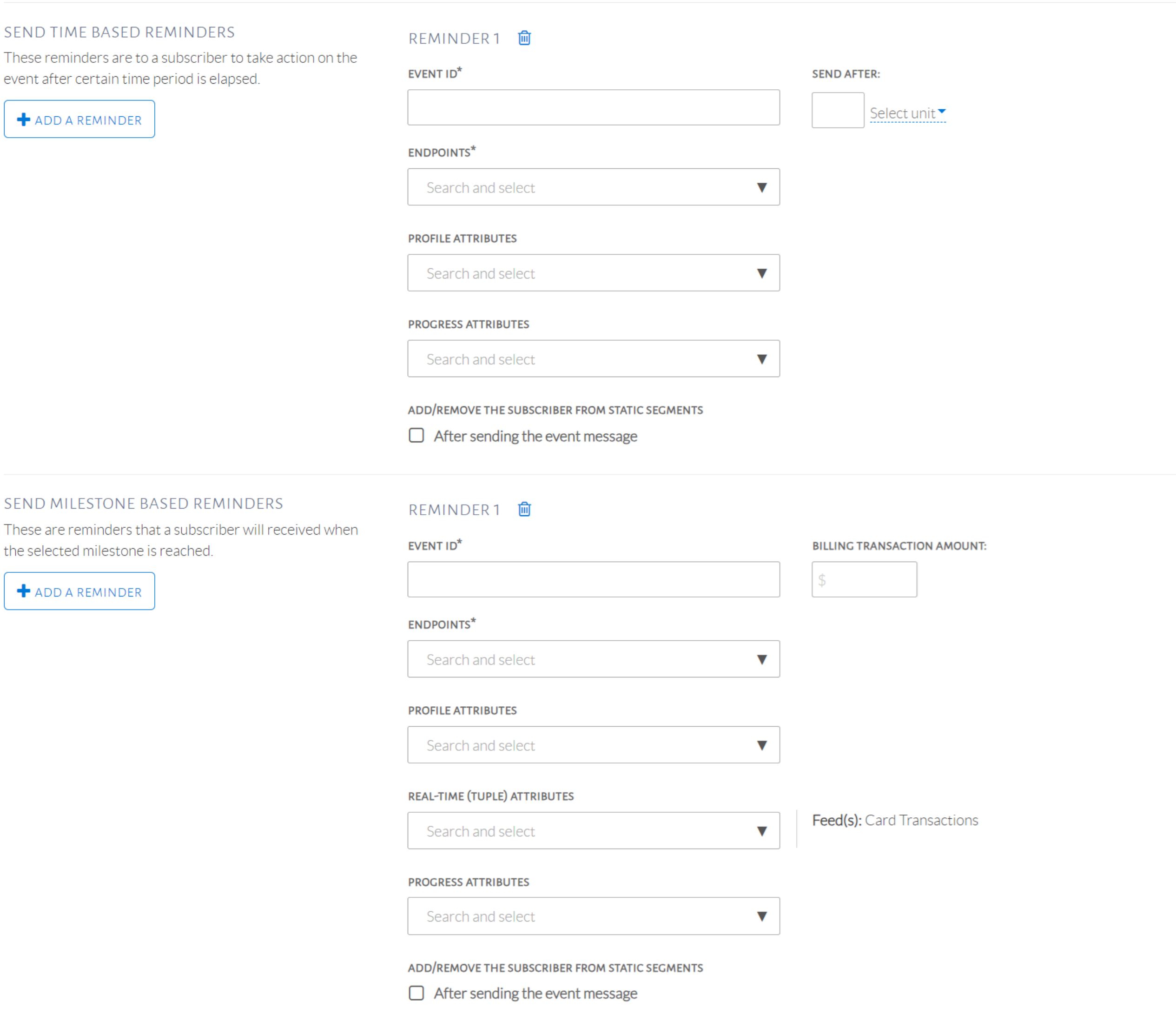
Final filter selection

Reminders can also be set by clicking Add a Reminder. Time-Based Reminders send a message to the customer based on the amount of time that has passed, which can be specified. Milestone-based Reminders send a message to the customer based on the purchase amount the customer has reached, which can be specified. These can be seen in the image below. For Cumulative Transactions, both reminders are possible and so are available for selection.



Reminders in an event

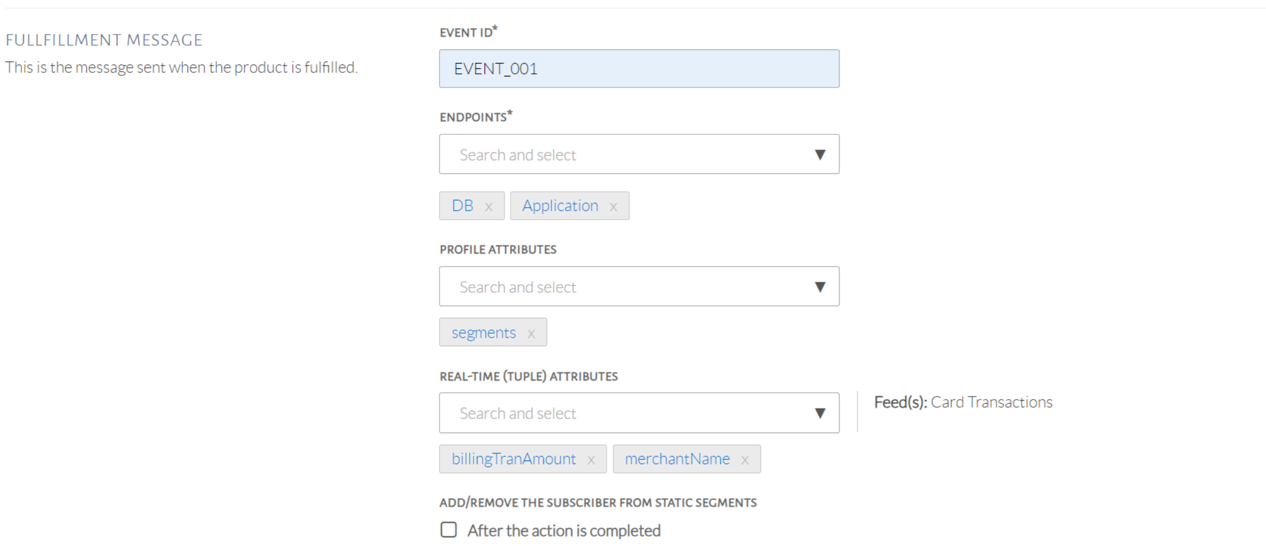
Upon clicking Add a Reminder to both options, the same options as a message-only event appear with a time and amount threshold for time and milestone based reminders respectively. The image below shows these fields. Once those thresholds are reached, another event is triggered by the system and forwarded to the selected downstream systems. Multiple time and milestone based reminders can be set as required.



Time and milestone based reminders

In the image above, there is also an option to forward Progress Attributes to the selected downstream systems. These 4 attributes represent the count or amount progress of the customer. They are Current Value, Remaining Value, Target Deadline and Total Value. Current Value represents the completed transaction count/amount. Remaining Value represents the transaction count/amount that is left for the action to be completed which is to meet the threshold in Selected Event Action. Target Deadline represents when the time threshold, configured in Selected Event Action will end. Total Value represents the target count/amount to be achieved in order to complete the action.

The Fulfillment Message defines what will be sent to the downstream system once the Event Action criteria is fulfilled. Selections here can be same or different than the initial event message and following reminders as shown in the image below.



Fulfillment message

Target Groups

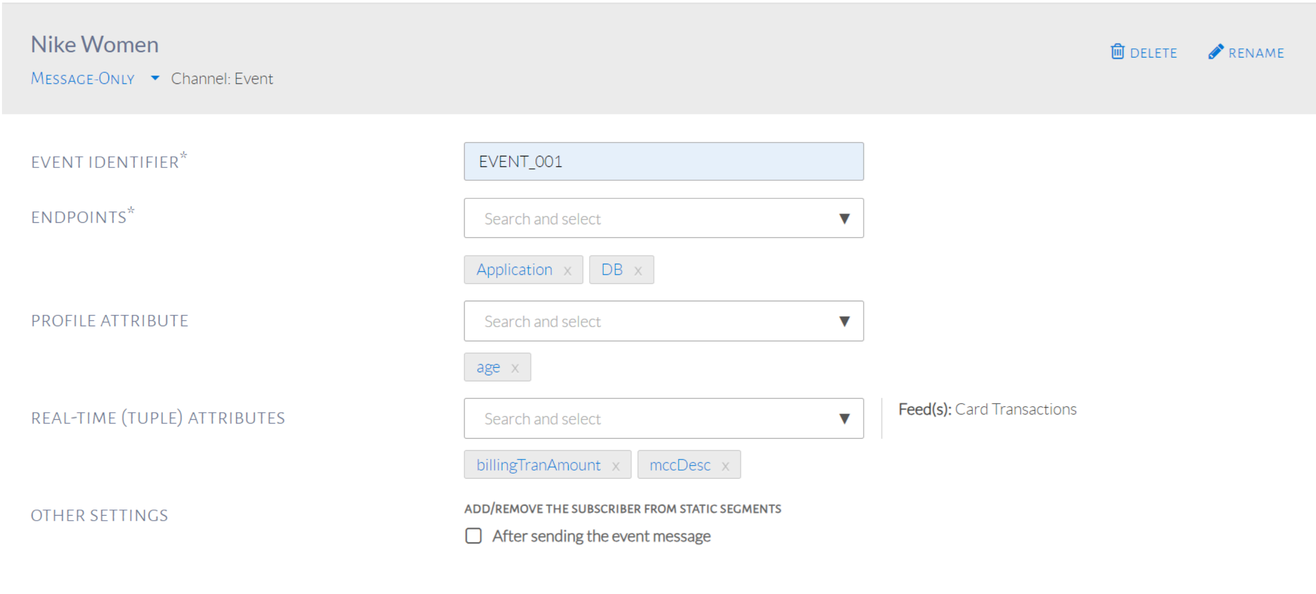
Target groups can be used to assign events to different groups among the customers who have qualified for the event.

USE-CASE: Assign the event "Nike Women" to all females who qualify, "Nike Men" to all males who qualify, and "Nike Others" to everyone else who qualifies

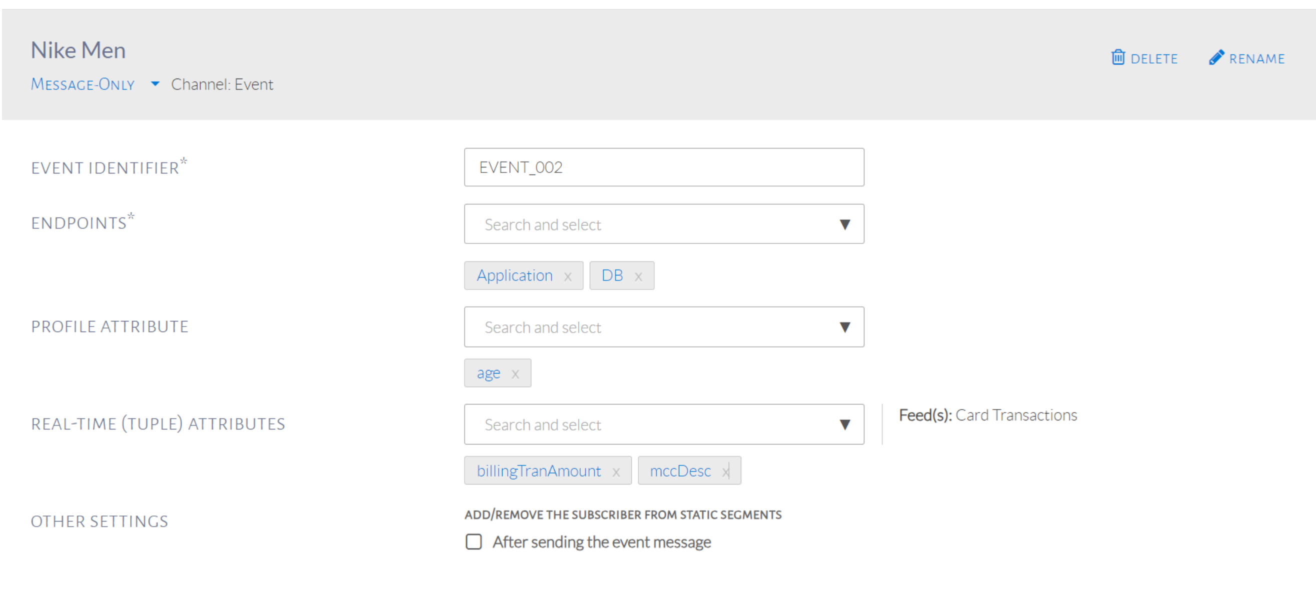
Summary of Steps:

1. Create multiple events by clicking Add New Event.
2. Choose conditions for each target group, making sure a customer cannot be part of multiple groups.
3. Assign an event to each target group.
4. Set an Everyone Else target group.

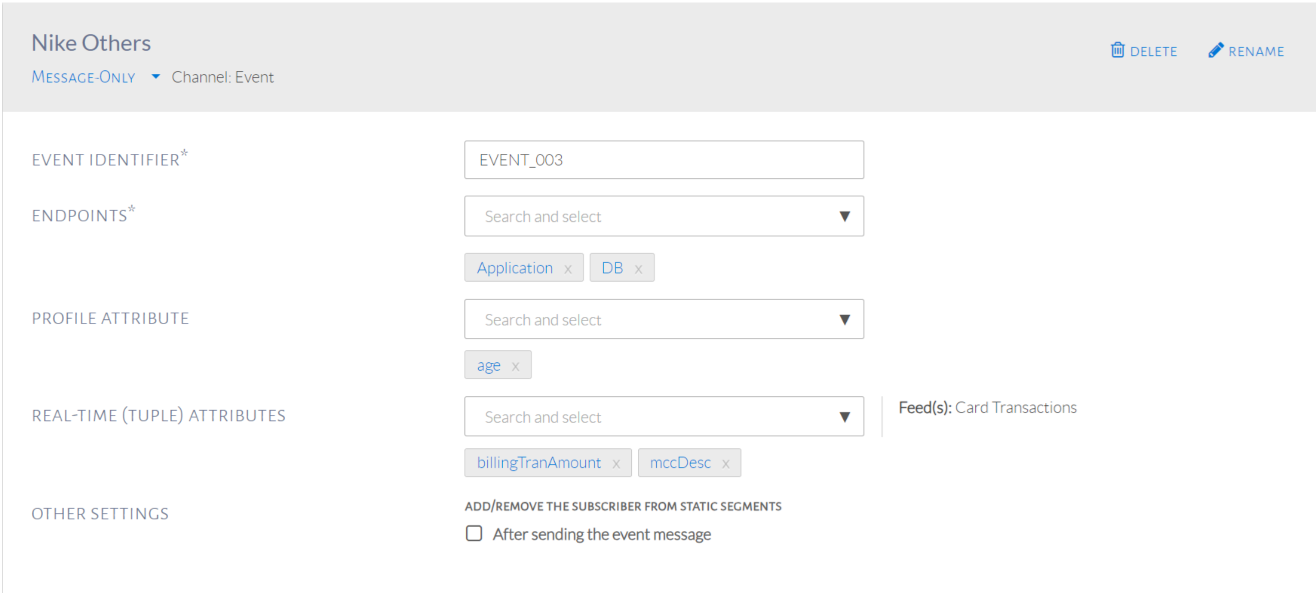
The events can be set-up as shown in the 3 images below. Edit the name of an event by clicking Rename.



First event

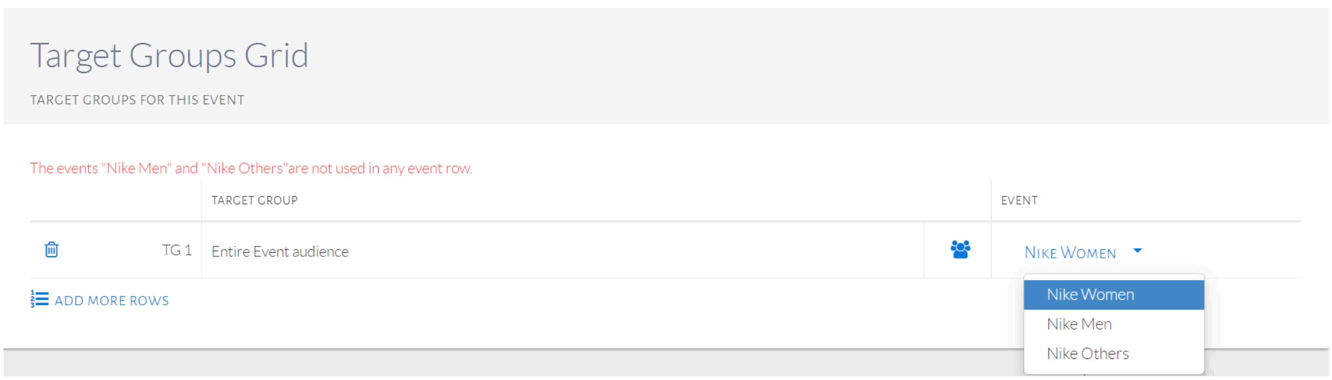


Second event



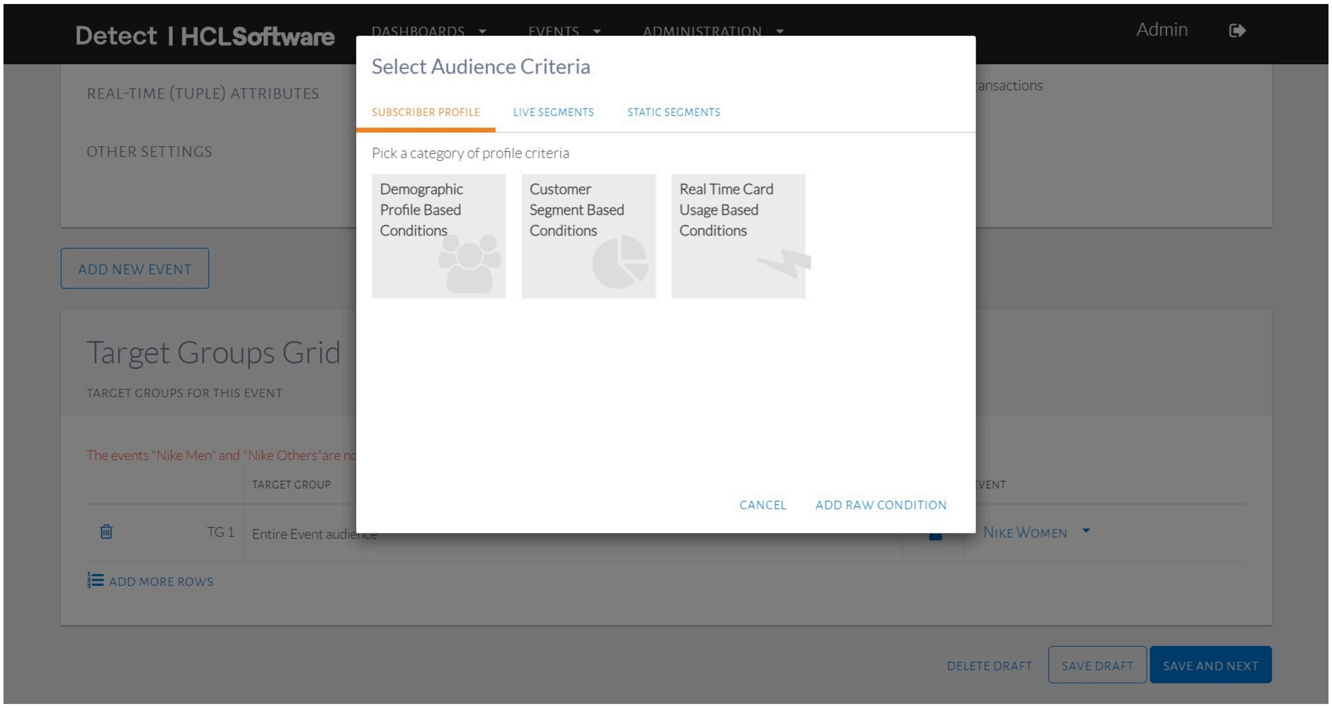
Third event

Assign an event to a specific target group as seen in the image below. Click on the orange icon near the event drop-down, to choose the conditions for each target group.



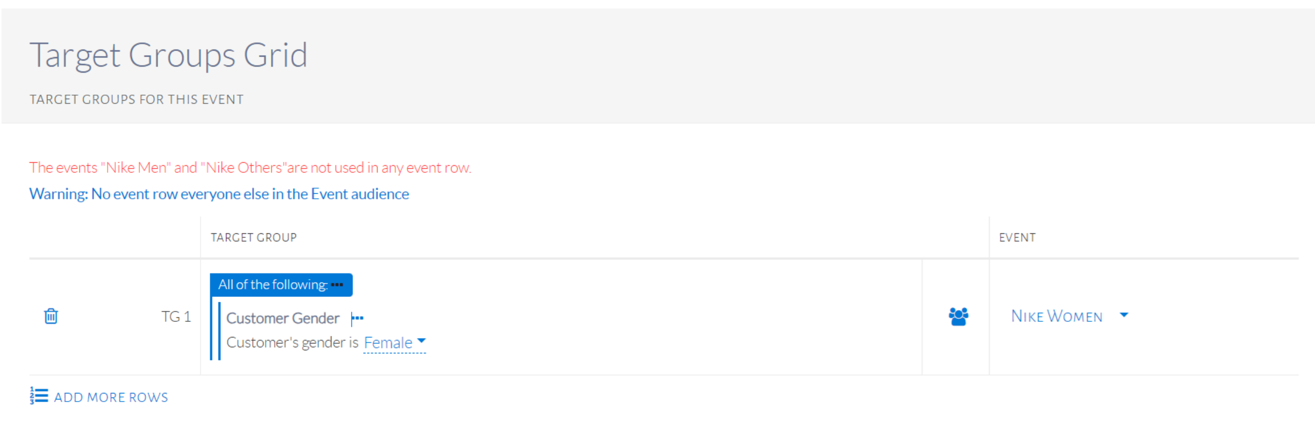
Assigning an event to a target group

The pop up for audience conditions will be shown, as seen in the image below. Select the desired conditions for the target group. For this example, we will select the condition Customer's Gender which is in demographic conditions.



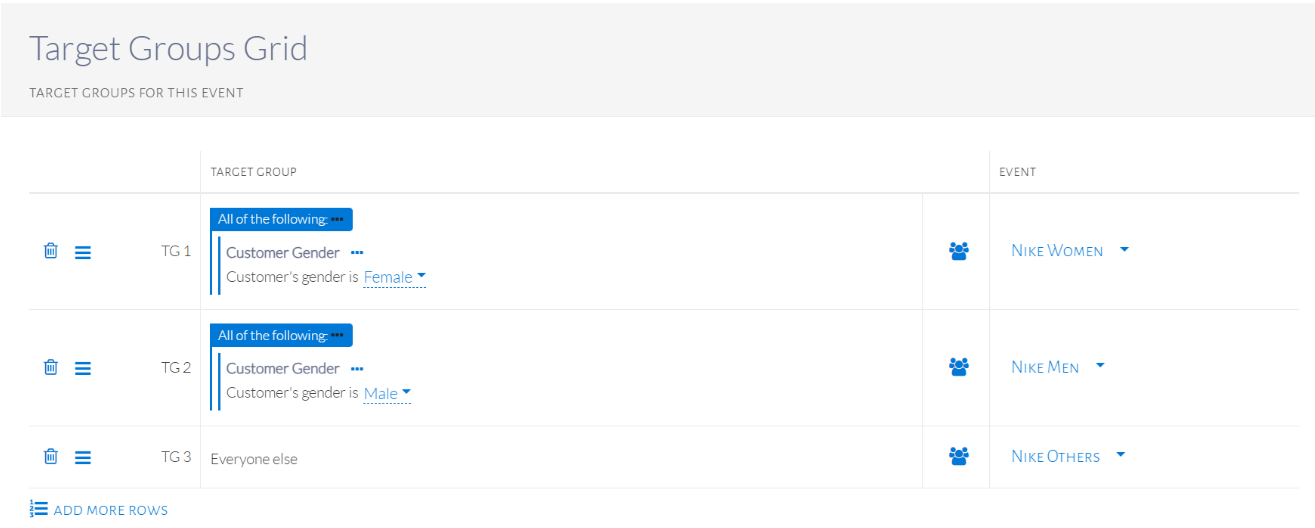
Selecting conditions for the target group

The condition for the target group is shown in the image below, along with the event assigned.



Target Group 1 comprises the females who qualify for the event.

The final set of target groups can be seen in the image below. It is important to note that an Everyone else target group must be set. Target groups must also never intersect, that is, a customer should not be part of 2 target groups. If this happens, only the event of the first target group will be received.



Final set up of target groups

Audience and Trigger Condition Logic

This section provides a detailed explanation of how customers are qualified for events, based on audience and trigger conditions.

Representation of Customer Transaction Aggregates

In order to visualize the processes of selecting customers throughout an event, let us use the example following example. Using merchant category code in the audience, where we are aggregating transaction count based on category code in the last 1 month. Let us take A-05-005 (Paypal) & A-06-006 (Google) category codes for the below example.

Let us say a customer with customerId: 1 has transacted for both Paypal and Google in the past month. Let us also say a customer with customerId: 2 has done a Paypal transaction only in the last month. The way Detect keeps record of this data can be represented using the table in image below.

customerID	categoryCode	transactionCount
1	Paypal	3
1	Google	1
2	Paypal	1
2	Google	0

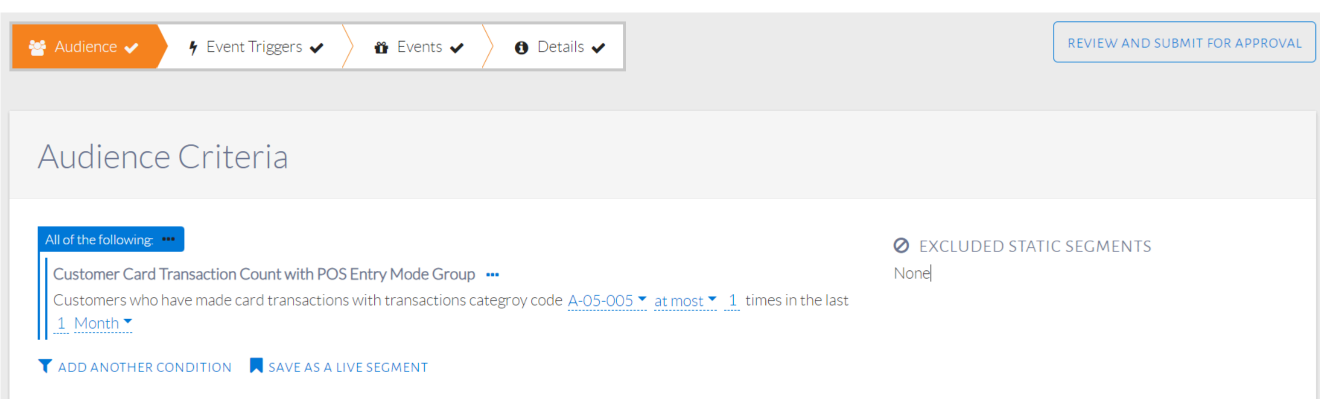
In the table, it is important to note that even though a customer only transacts for Paypal, a running tally or aggregate for Google transactions is still kept. However, the value will be 0. This is important for understanding the logic behind audience conditions and trigger conditions.

The expanded table in the image below contains information about the number of card transactions by customers for the last 1 month. CustomerID 1 and customerID 2 from the table above can be found also. CustomerID 3 with a Google transaction and CustomerID 4 with both Paypal and Google transactions are also included in the table.

customerID	categoryCode	transactionCount
1	Paypal	3
1	Google	1
2	Paypal	1
2	Google	0
3	Paypal	0
3	Google	1
4	Paypal	1
4	Google	1

Audience Condition Logic

Now, let's say the audience comprises of customers with a credit card who have made at most 1 transaction with Paypal in the last 1 month. The audience conditions will be set up as seen in the image below.



A representation of these audience conditions and the way customers are qualified is shown in the image below. The customers who initially satisfy these conditions are highlighted in yellow in the table and make up the audience size. It is important to note that the audience size changes constantly. This is because as time passes, customers are added to or removed from the event based on if they can meet the audience conditions. If customer 4, who currently meets audience conditions, transactions with Paypal once more in the same month, they will not meet the condition and will be removed from the audience. Similarly, customer 3 will continue to meet conditions for their next 2 Paypal transactions only.

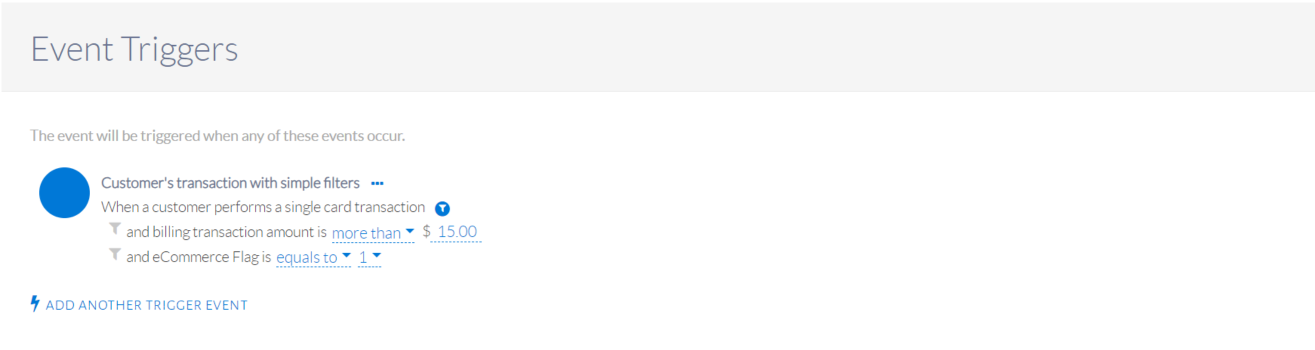
Audience: cateogryCode = A-05-005 transactionCount <=1		**Qualified:** customerID2, 3 & 4	**Audience Size:** 3
	customerID	**categoryCode**	**transactionCount**
	1	Paypal	3
	1	Google	1
	2	Paypal	1
	2	Google	0
	3	Paypal	0
	3	Google	1
	4	Paypal	1
	4	Google	1

At this point, customerID 2, customer ID 3 and customer ID 4 satisfy the audience conditions. The audience size is shown as 3.

Trigger Condition Logic

The trigger condition filters customers differently. Instead of looking at the state of individual customers, the trigger monitors specific events. In this case, the trigger event is when a specific type of transaction is made. This means it will monitor transaction logs.

The trigger condition will be set up as seen in the image below.



A representation of this trigger condition and the way it selects customers is shown in the image below. The customers who satisfy the condition are highlighted in blue in the table. These are the customers who have done the trigger event.

Audience: eCommerceFlag = 1 transactionAmount <200		**Qualified:** customerID 1, 2 & 4	**Audience Size:** 3
customerID	**transactionAmount**	**eCommerceFlag**	**dateTime**
3	150	1	9:00 AM
4	300	1	9:01 AM
1	205	1	9:02 AM
1	500	0	9:03 AM
2	375	1	9:04 AM
4	225	0	9:05 AM

Satisfying both Audience and Trigger Conditions

The customers who qualify for the event are those who have satisfied both the audience condition and the trigger condition. That is, they are of the desired profile and they satisfy the trigger event.

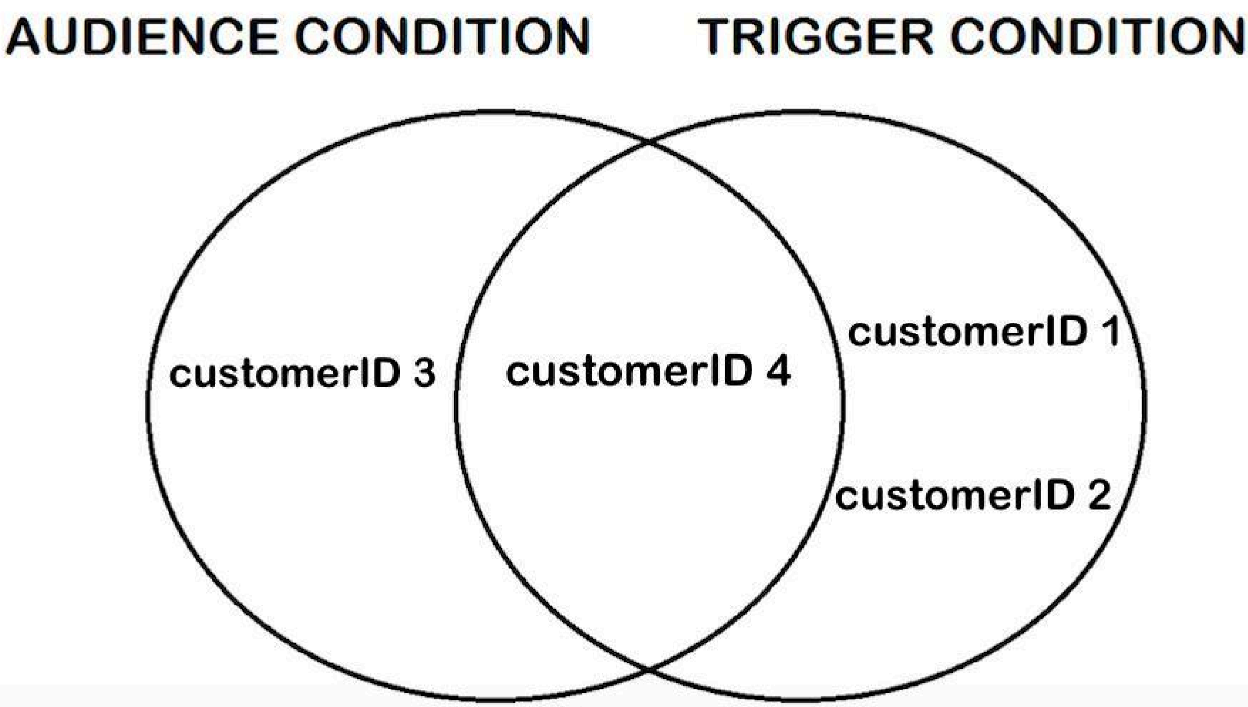
However, before proceeding to identify these customers, it is important to recall that customers can be added to or removed from the audience based on updated, real-time data.

Taking into account the recent transactions in the trigger condition table, we can see that some customers who were initially included in the audience were no longer qualified after doing the trigger event. (The trigger event increased their transactionCount) In the image below, we see the updated transactionCount in the audience condition table. We will turn the previous transactionCount grey so we can easily distinguish them. The trigger condition table is also shown.

Audience: cateogryCode = A-05-005 transactionCount <=1		Qualified: customerID 3 & 4	Audience Size: 2
customerID	categoryCode	transactionCount	newTransactionCount
1	Paypal	3	4
1	Google	1	1
2	Paypal	1	2
2	Google	0	0
3	Paypal	0	0
3	Google	1	3
4	Paypal	1	1
4	Google	1	2

Audience: eCommerceFlag = 1 transactionAmount <200		Qualified: customerID 1, 2 & 4	Audience Size: 3
customerID	transactionAmount	eCommerceFlag	dateTime
3	150	1	9:00 AM
4	300	1	9:01 AM
1	205	1	9:02 AM
1	500	0	9:03 AM
2	375	1	9:04 AM
4	225	0	9:05 AM

When the evaluation is done at this point, only customerID 4 satisfies both the audience condition and the trigger condition. Therefore, customerID 4 is the only customer who qualifies for the event. The venn diagram in the image below shows this in summary form.



Importance of Specifying Trigger Conditions

Although the conditions specified for audience and triggers may seem redundant, specifying each is important. The scenario in the image below shows the result of omitting the "eCommerceFlag" filter in the trigger condition for the same event discussed.

Audience: cateogryCode = A-05-005 transactionCount <=1		**Qualified:** customerID 3 & 4	**Audience Size:** 2
customerID	**categoryCode**	**transactionCount**	**newTransactionCount**
1	Paypal	3	4
1	Google	1	1
2	Paypal	1	2
2	Google	0	0
3	Paypal	0	1
3	Google	1	3
4	Paypal	1	1
4	Google	1	2

Audience: eCommerceFlag = 1 transactionAmount <200		**Qualified:** customerID 1, 2, 3 & 4	**Audience Size:** 4
customerID	**transactionAmount**	**eCommerceFlag**	**dateTime**
3	150	1	9:00 AM
4	300	1	9:01 AM
1	205	1	9:02 AM
1	500	0	9:03 AM
2	375	1	9:04 AM
4	255	0	9:05 AM

The customers who satisfy both audience and trigger conditions are customerID 3 and customerID 4. However, this is problematic because customerID 3 does not even have a past Paypal transaction. Since the categoryCode was not specified in the trigger condition, it was the Google transaction that mistakenly satisfied the trigger condition.

Importance of Specifying Audience Conditions

The next scenario in the image below shows the result of omitting the "categoryCode" filter in the audience condition for the same event.

Audience: cateogryCode = A-05-005 transactionCount <=1		**Qualified:** customerID 1, 2, 3 & 4	**Audience Size:** 4
customerID	**categoryCode**	**transactionCount**	**newTransactionCount**
1	Paypal	3	4
1	Google	1	1
2	Paypal	1	2
2	Google	0	0
3	Paypal	0	0
3	Google	1	3
4	Paypal	1	1
4	Google	1	2

Audience: eCommerceFlag = 1 transactionAmount <200		**Qualified:** customerID 1, 2 & 4	**Audience Size:** 3
customerID	**transactionAmount**	**eCommerceFlag**	**dateTime**
3	150	1	9:00 AM
4	300	1	9:01 AM
1	205	1	9:02 AM
1	500	0	9:03 AM
2	375	1	9:04 AM
4	225	0	9:05 AM

The customers who satisfy both audience and trigger conditions are customerID 1, 2 and 4. However, this is problematic because customerID 1 and 2 have Google categoryCode transactions, which should not qualify them for the audience. Since the categoryCode was not specified in the audience condition, it was their Google transactions that mistakenly satisfied the audience condition.

Customer Added to Audience after Trigger Event

In the previous example, we saw that a customer who was initially part of the audience could be removed after qualifying for a trigger event (a specific transaction). This could happen when a customer goes over a desired transactionCount in the audience condition.

For this example, we will see that a customer who was not initially part of the audience can also be added after fulfilling the trigger event. This could happen when a customer meets a desired transactionCount in the audience condition.

Audience: cateogryCode = A-05-005 transactionCount >=1		Qualified: customerID 1, 2 & 3	Audience Size: 3
customerID	categoryCode	transactionCount	newTransactionCount
1	Paypal	1	2
1	Google	0	0
2	Paypal	1	1
2	Google	0	0
3	Paypal	0	1
3	Google	1	0
4	Paypal	0	0
4	Google	0	1

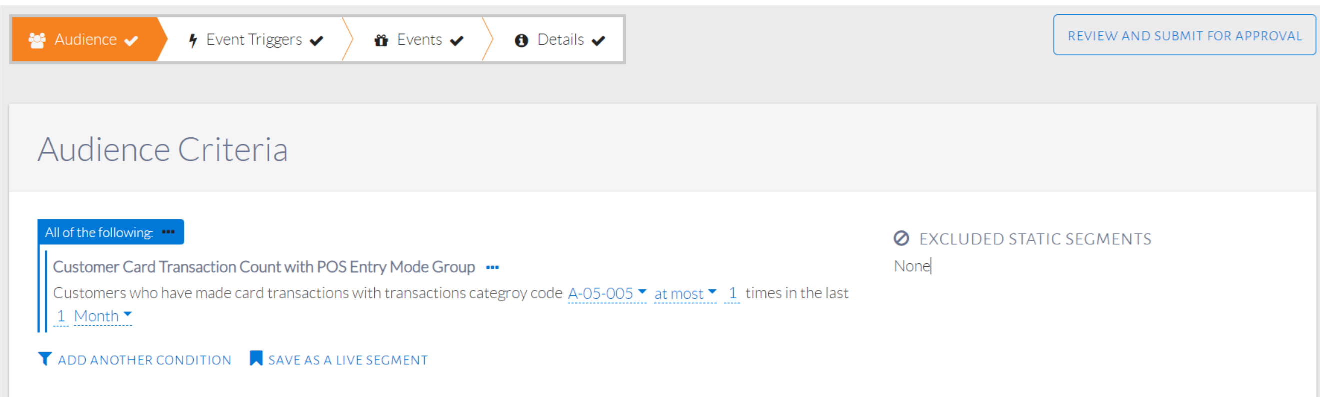
Audience: eCommerceFlag = 1 transactionAmount <200		Qualified: customerID 1, 3	Audience Size: 2
customerID	transactionAmount	eCommerceFlag	dateTime
3	250	1	9:00 AM
4	300	1	9:01 AM
2	175	1	9:02 AM
1	500	0	9:03 AM

When the evaluation is done at this point, customerID 1 and customerID 3 satisfy both the audience condition and the trigger condition. They qualify for an event.

Using 'Both Category Code Count' Condition

For this example, let us say the audience of the event are customers with at most 3 Paypal or Google transactions. The trigger for the event is when an ecommerce transaction is done.

The audience condition should include both Paypal and Google categories which is set up as seen in the images below.



This condition looks at the combined transaction count of both Paypal and Google per customer. If a customer has done 3 transactions of Paypal, and 1 of Google, the combined transaction count will be 4. Hence, the '+' in the condition description.

A representation of the audience conditions and the way it selects customers is shown in the image below.

Audience: cateogryCode = A-05-005 transactionCount (Paypal + Google)		Qualified: customerID 2 & 4	Audience Size: 2
customerID	categoryCode	transactionCount	newTransactionCount
1	Paypal	3	4
1	Google	1	1
2	Paypal	1	2
2	Google	0	0
3	Paypal	0	1
3	Google	1	3
4	Paypal	1	1
4	Google	1	2

Audience: eCommerceFlag = 1		Qualified: customerID 1, 2 & 4	Audience Size: 3
customerID	transactionAmount	eCommerceFlag	dateTime
3	150	1	9:00 AM
4	300	1	9:01 AM
1	205	0	9:02 AM
1	500	0	9:03 AM
2	375	1	9:04 AM
4	255	1	9:05 AM

It is important to note that this audience condition computes the combined transaction count of both Paypal and Google, even if the both the categories have not been fulfilled. For example, customerID 2 has a Paypal transaction count of 2 and the Google transaction count of 0. The combined transaction count will therefore be 2 + 0 or 2, and he will qualify for the audience.

Audience

A number of options are available when selecting audience conditions for an event. For better understanding of these options, we will explore different use-cases.

Raw Audience Condition

A raw audience condition is a customized audience condition. There may be a need to create this if the user cannot find the condition they need in the lists provided.

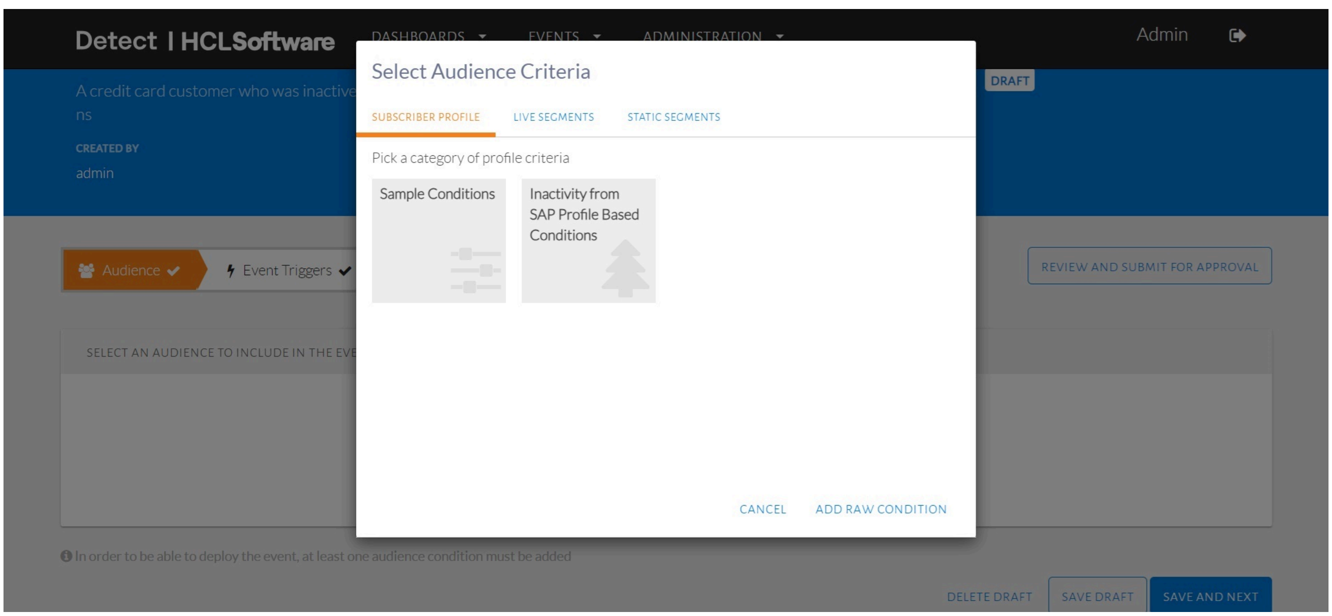
USE-CASE: Create a raw condition based on customer's nationality

Audience must be customers who are of Singaporean nationality.

Summary of Steps:

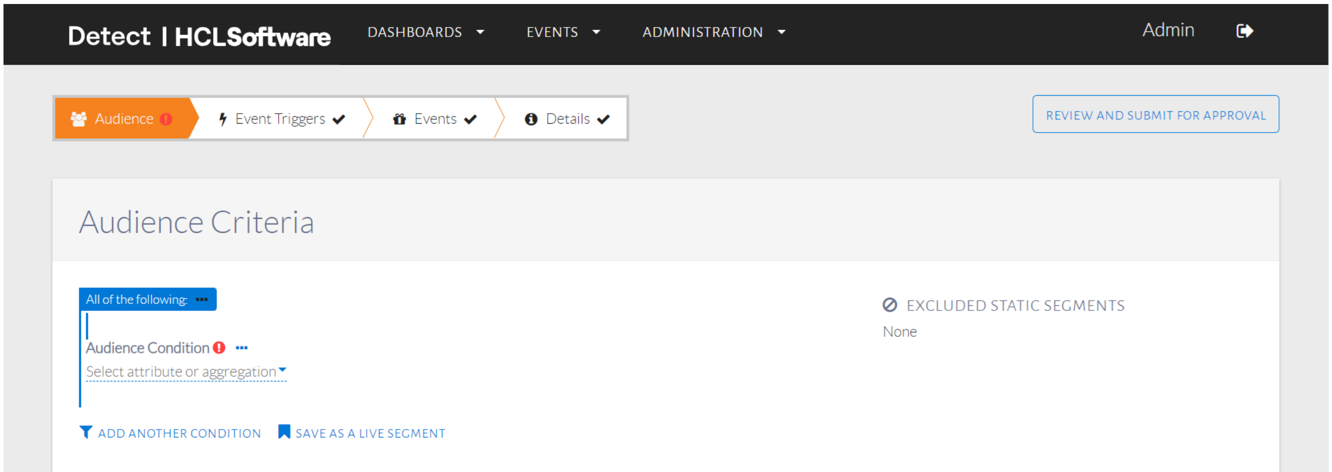
1. From the Audience Criteria pop-up, click add raw condition.
2. Select an attribute/aggregation to filter by.
3. Set value of attribute/aggregation in condition.

From the Audience Criteria pop-up seen in the image below, click Add Raw Condition.



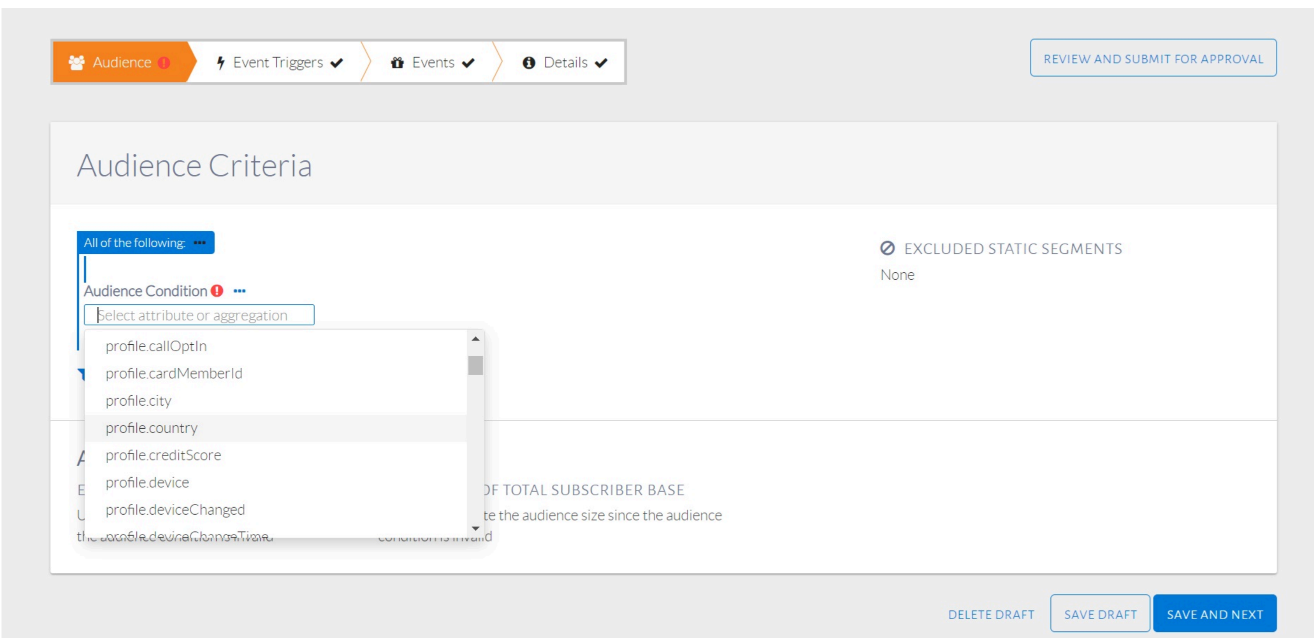
Add Raw Condition

A blank audience condition will appear, as seen in the image below. Click on Select attribute or aggregation to display a list of attributes or aggregations which the user can select from. Once an attribute or aggregate is selected, the user can specify its value.



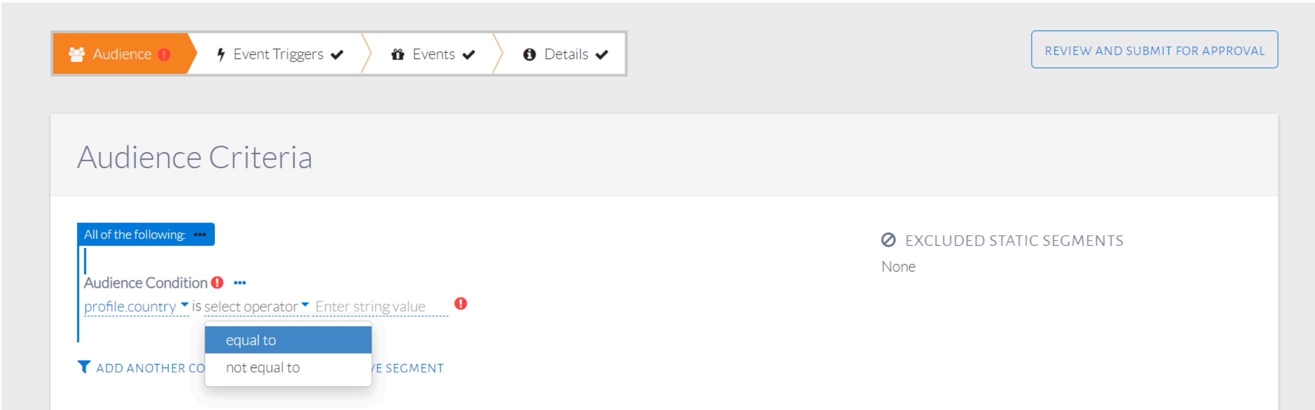
Raw audience condition

The list displayed is seen in the image below. Select the country code attribute.



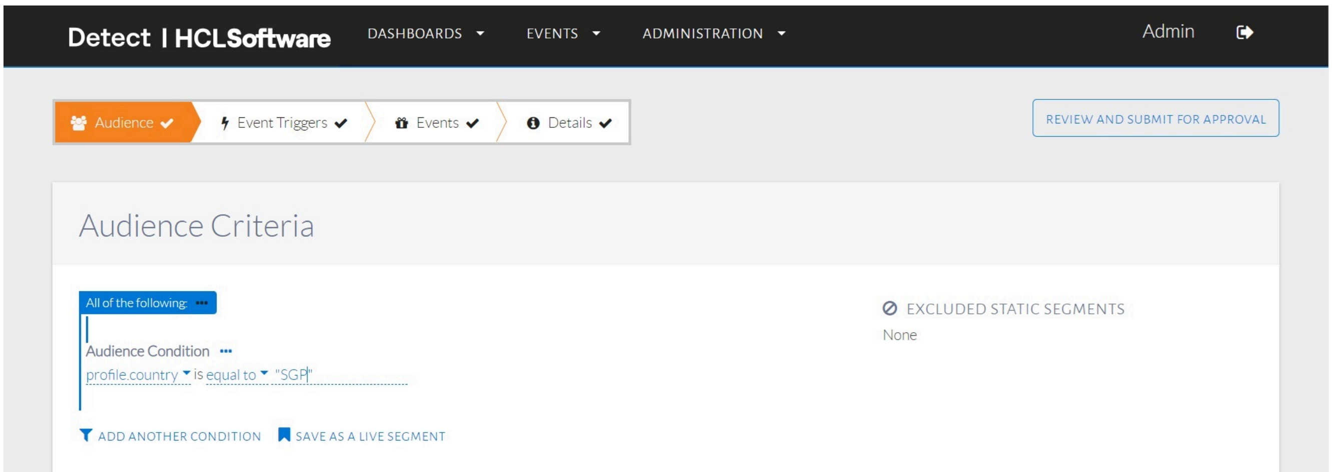
Selecting an attribute or aggregation

The selected attribute will be displayed, as seen in the image above. The user will then need to select the operator, which is 'equal to' in this example.



Selecting an operator

The operator will be displayed, as seen in the image above. Specify the code representing Singapore in the space provided after the operator. As a string is expected, add double quotes to the code "SGP" as shown in the image below.



Type in country code in double quotes

Condition Groups

Individual audience conditions can be combined using condition groups. For the condition group All of the following, a customer must satisfy all of the statements under the condition group to be qualified as part of the audience. For the condition group Any of the following, a customer can satisfy at least one of the statements under the condition group to be qualified as part of the audience.

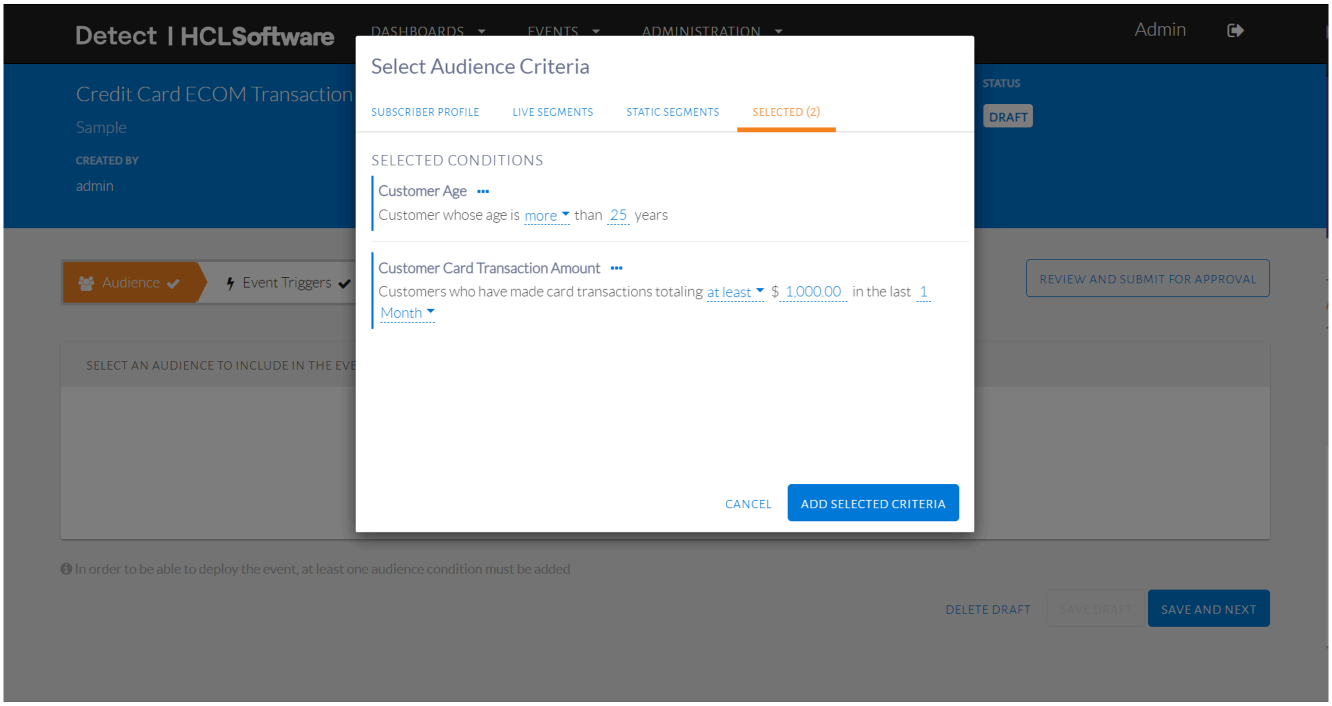
USE-CASE: Using an "All of the following" Condition Group

For this example, the audience includes Married customers that have spent at least NT $1,000 in the last 1 month.

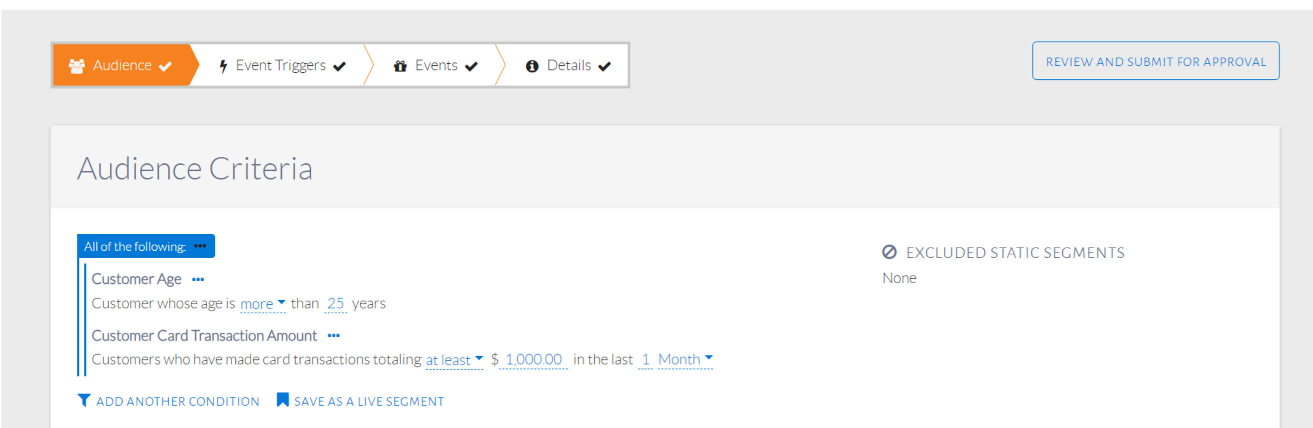
Summary of Steps:

1. Add multiple conditions. By default, they fall under the All of the following condition group.
2. Alternatively, click the ellipses (…) to add a condition within a condition group.

The condition group All of the following should be used. It is the default condition group, so simply check all conditions and specify their values, as seen in the 2 images below.

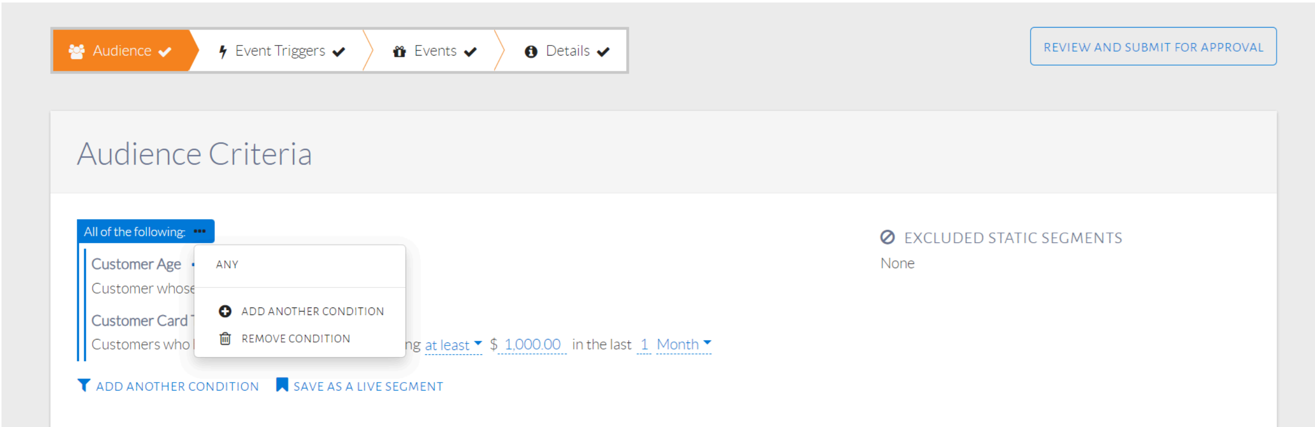


Select multiple conditions



Default condition group is All of the Following

Alternatively, the user can begin by adding one condition and clicking the ellipsis (…) button on the condition group, as seen in the image below. This allows the user to add another condition within that group, remove the condition group, or convert it to Any of the following.



Adding, removing or converting condition group

The added condition will automatically fall under the original condition group, which is All of the following.

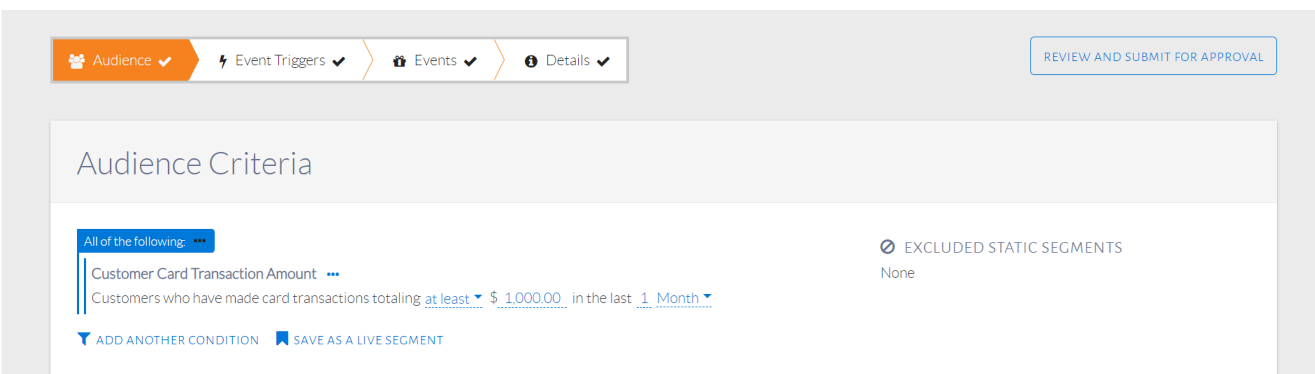
USE-CASE: Using an "Any of the following" Condition Group

For this example, the audience should be customers who have spent at least NT $1,000 in the last month or have transacted 10-15 times within the last month.

Summary of Steps:

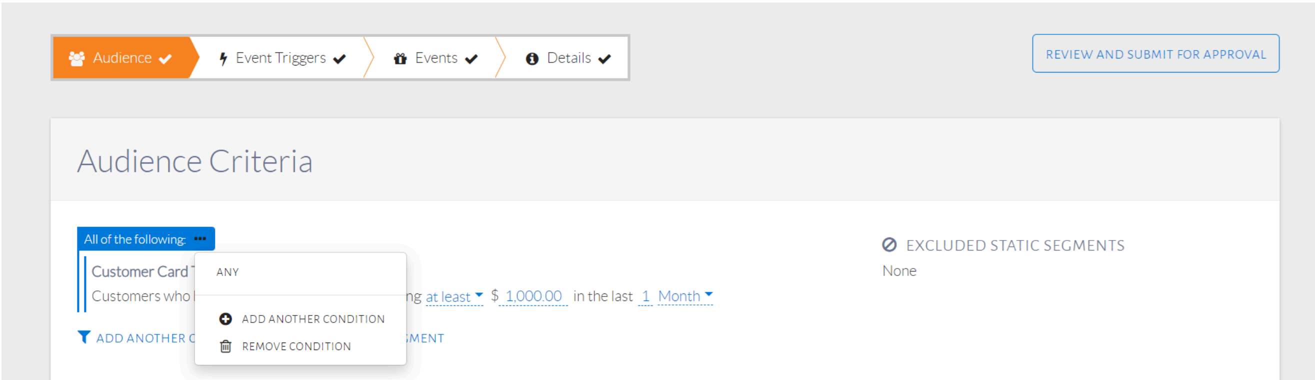
1. Add a condition.
2. Convert default condition group All of the following to Any of the following.
3. Click ellipses (…) to add a condition within the condition group.

The condition group Any of the following should be used. Start by adding one condition as seen in the image below, which selects customers who have spent at least NT $1,000 in the last 1 month.



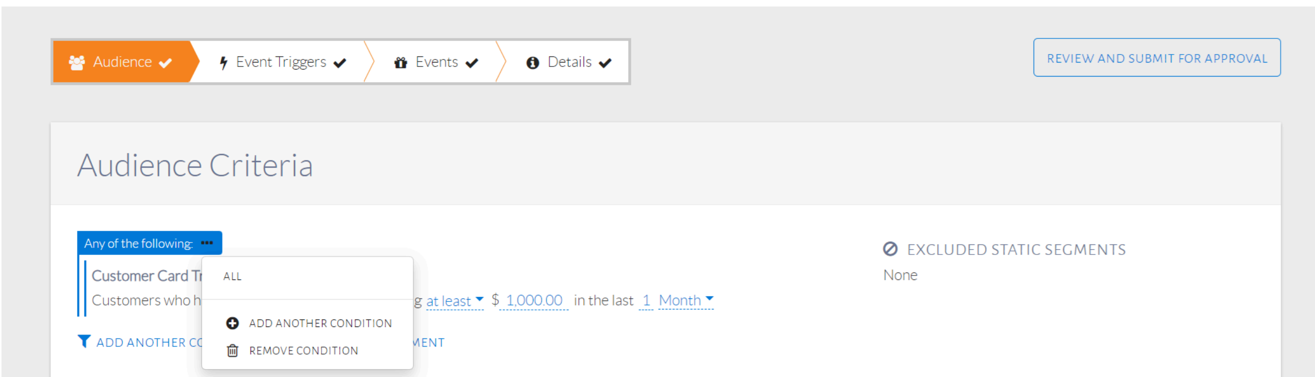
One audience condition added

Click the ellipses (…) button on the condition group, as seen in the image below. Select ANY to convert it to Any of the following.



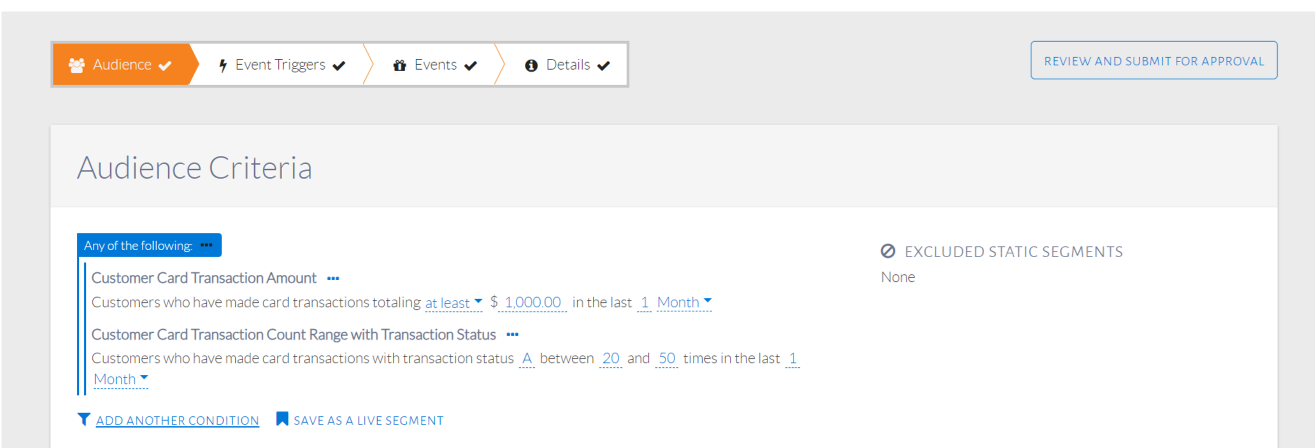
Click ANY to convert condition group

Once converted, click the ellipses again as seen in the image below. Select Add another condition to add an individual condition to the condition group.



Converted condition group to Any of the following

The added condition can be seen in the image below. It will automatically fall under the original condition group, which is Any of the following.



Condition added to Any of the following condition group

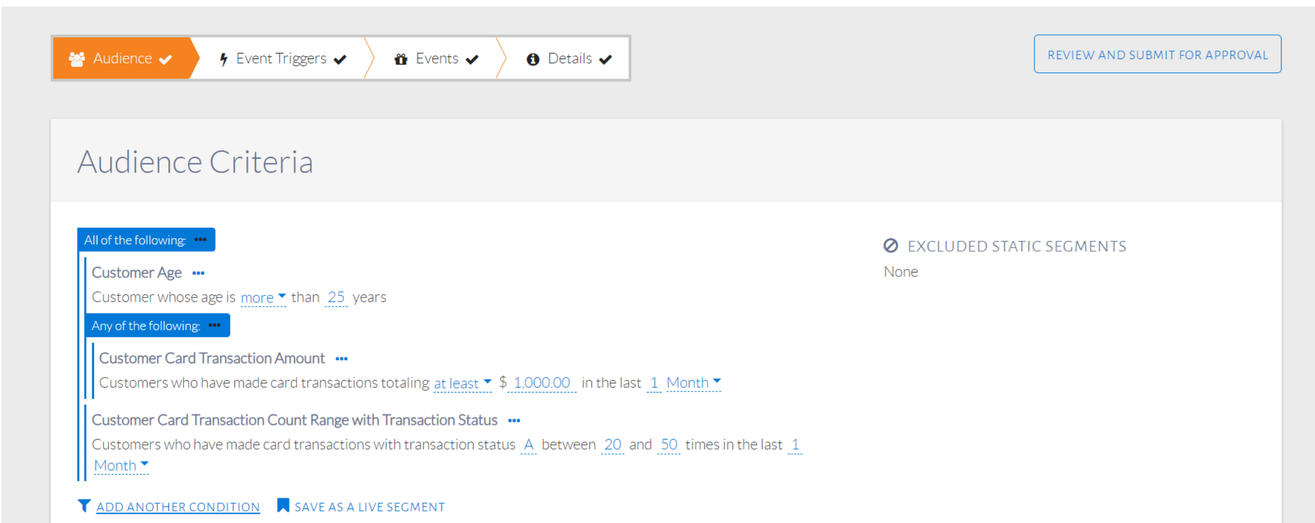
USE-CASE: Using Nested Condition Groups

For this example, the audience should be customers who are Married & have spent at least NT $1,000 in the last month or have transacted 10-15 times in the last month.

Summary of Steps:

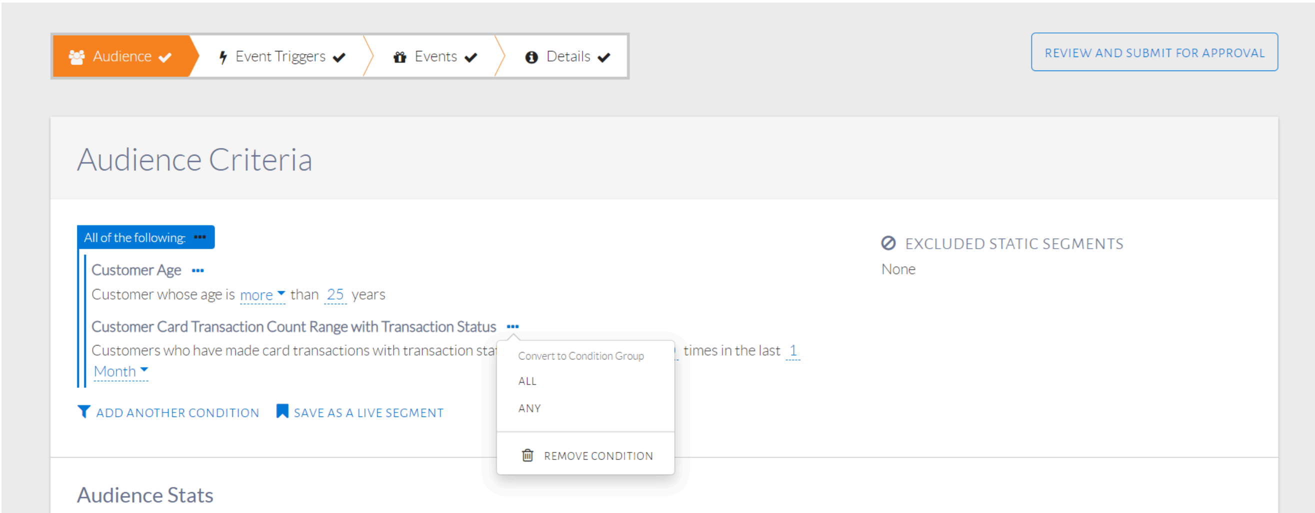
1. Add multiple conditions. By default, they fall under the All of the following condition group.
2. Click the ellipses (…) beside the group condition.
3. Click ANY to convert to Any of the following condition group.
4. Click the ellipses (…) on the new condition group to add a condition within the group.

A combination of condition groups must be used, which is called a nested condition group. The final conditions should be set up as seen in the image below. They can be read as "customers who are married AND have spent at least NT $1,000 in the last 1 month or have transacted 10-15 times in the last 1 month."



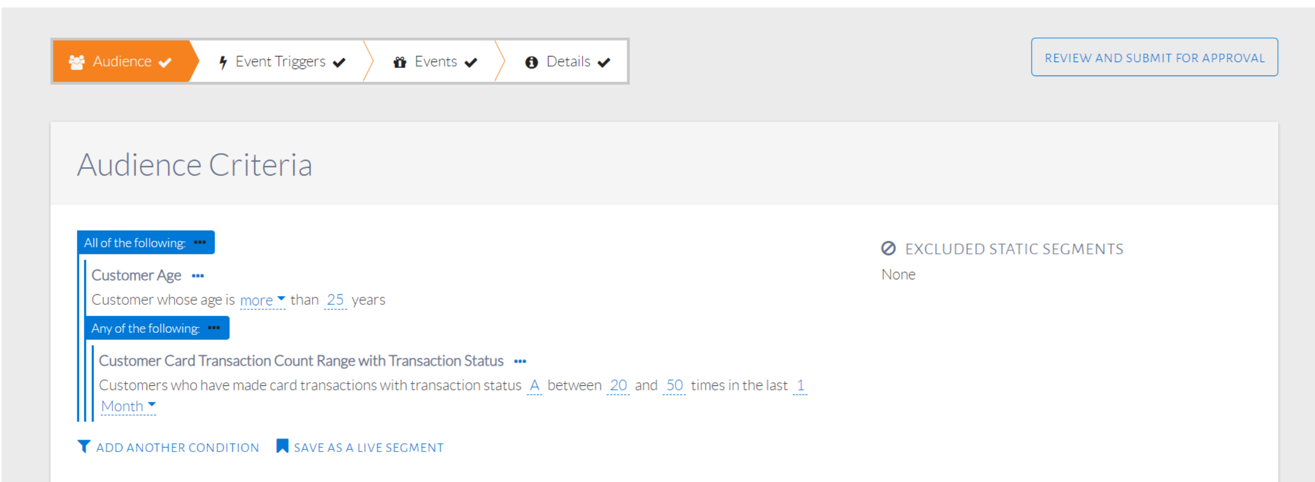
Set up nested condition groups

Recall the previous audience condition setup which included Married customers with at least $1,000 spent in the last 1 month. Set up those conditions. Click the ellipsis button beside an individual condition to see options that convert it into an ANY condition group or remove the individual condition, as seen in the image below. Alter the condition to ANY.



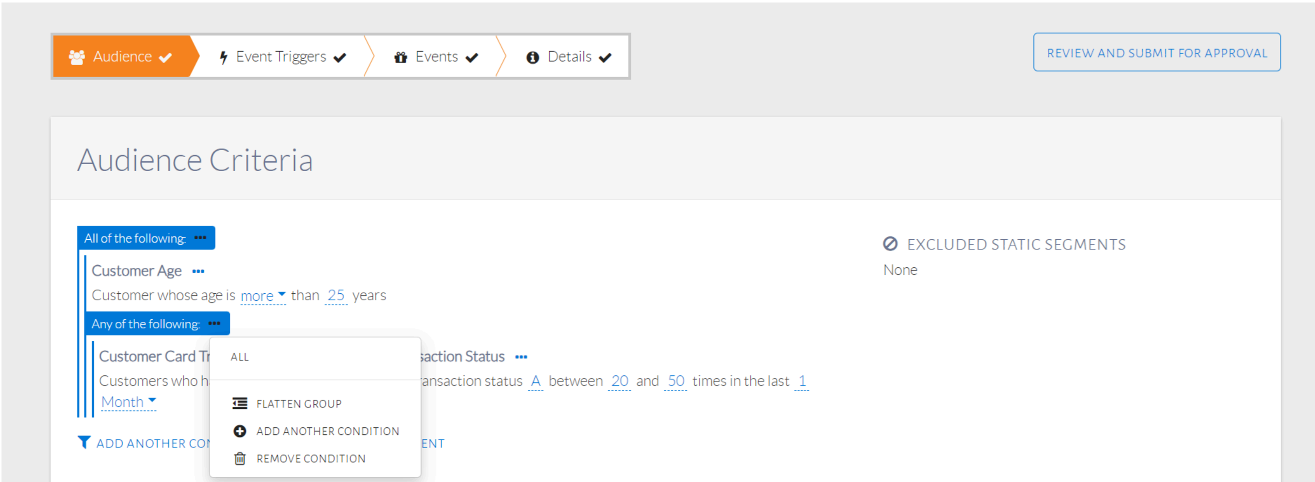
Set up a combination of condition groups

The resulting condition is shown in the image below. Use the ellipsis icon near the ANY condition to add a new condition. This is where we will add the condition on transaction count in the past month.

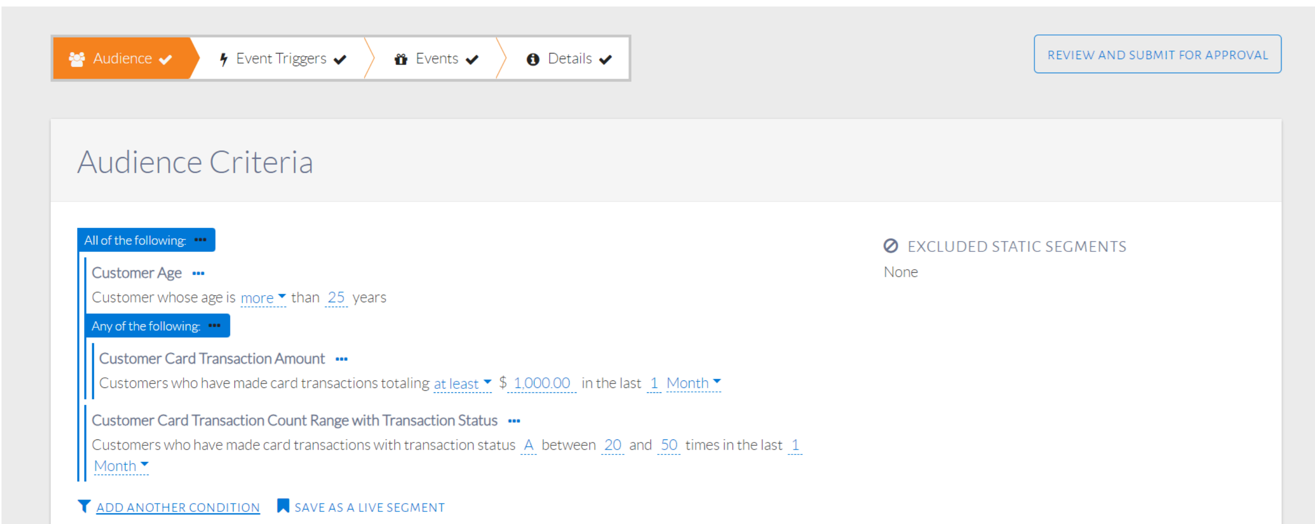


Condition type changed to ANY

Clicking the ellipsis button on the new condition group will show the options available, as seen in the image below. Flatten Group will undo the conversion, turning it back into an individual condition. Remove Condition will remove the whole condition group. Add Another Condition will add a condition to the condition group, select this option.



Adding the last condition to the ANY group



Nested condition groups

The added condition, as seen in the image above, will automatically fall under the Any of the following group due to the correct ellipsis option being used.

Live Segments

After setting up audience conditions, they can be saved for future use using a live segment. The customers in a live segment will be a changing set, based on the audience conditions.

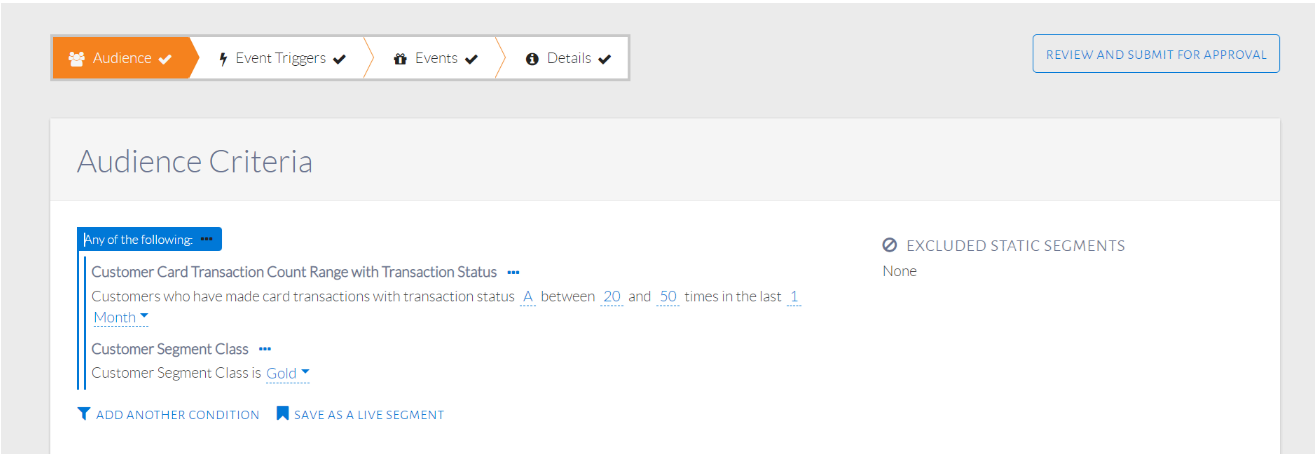
USE-CASE: Saving Audience Conditions into a Live Segment

Save audience conditions that select customers who have transacted at least once with the merchant category A-04-004 (LinePay) in the last 3 months and have a customer status of Active.

Summary of Steps:

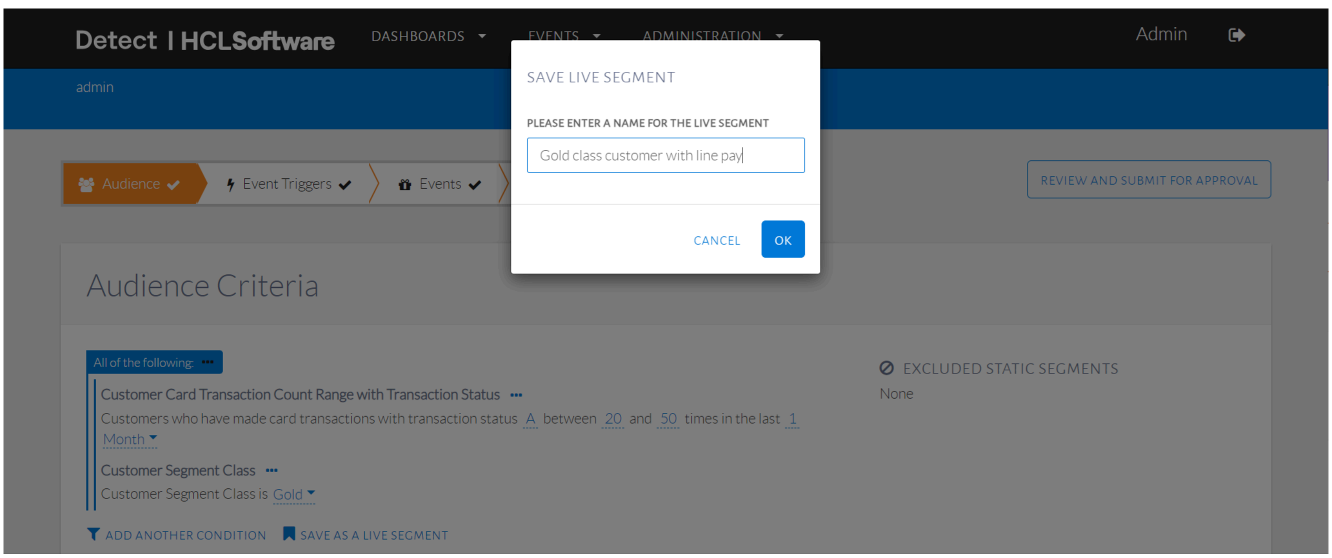
1. Click Save as Live Segment.
2. Enter name for live segment and press OK.

The audience conditions will be set up as seen in the image below. Click Save as a Live Segment.



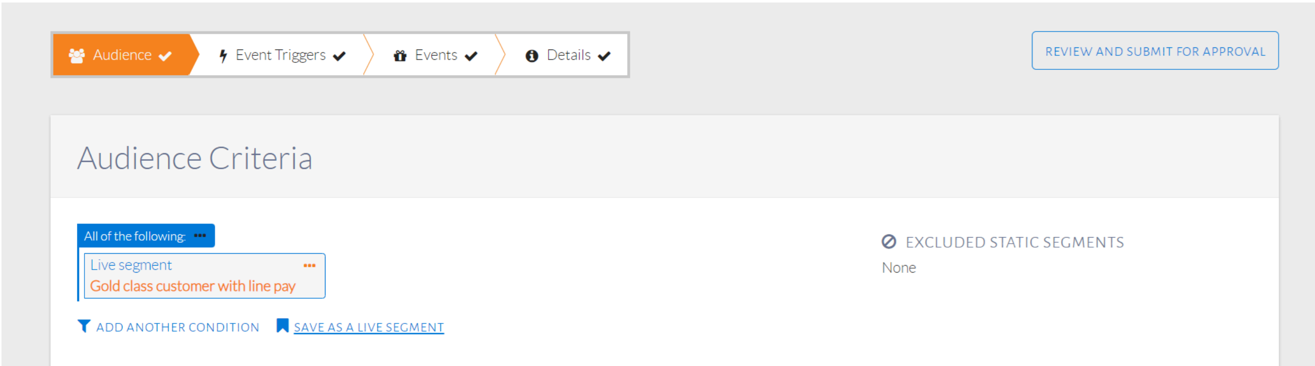
Audience Conditions

Enter a name for the live segment, as seen in the image below.



Name of live segment

The live segment will now be displayed as seen in the image below. Customers will be added and removed from this as they transact and if their status changes.



Live segment shown in audience conditions

This segment can now be used in other events and by other users.

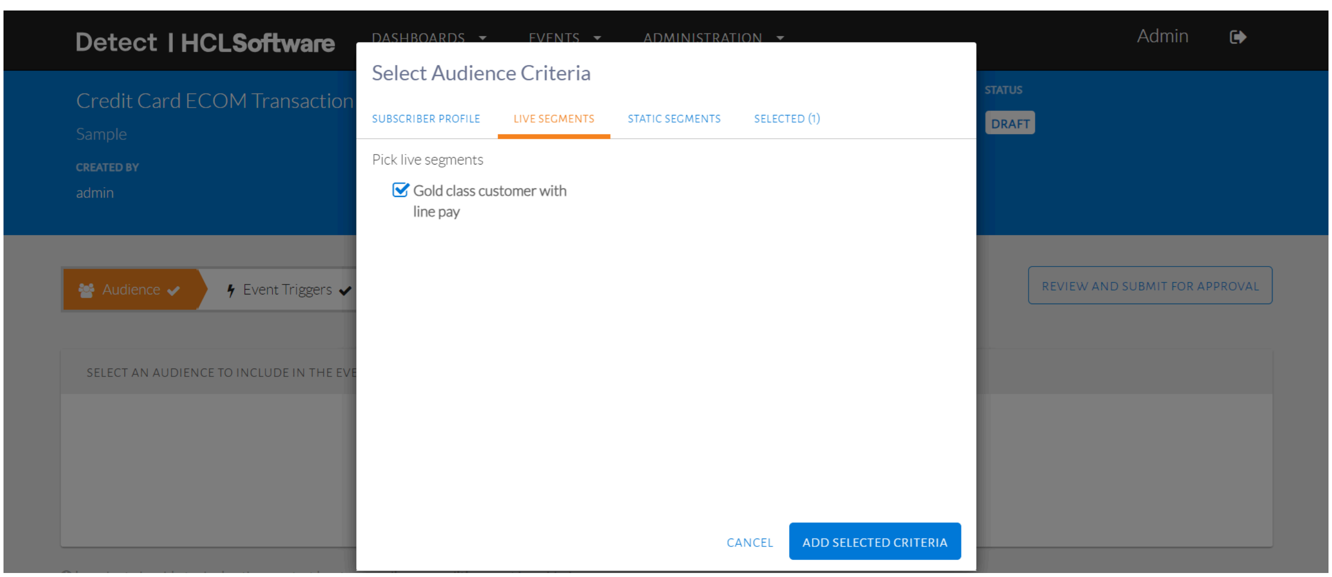
USE-CASE: Using Live Segment as Audience Conditions

Use the live segment "Active Customers with LinePay" as the audience for the event.

Summary of Steps:

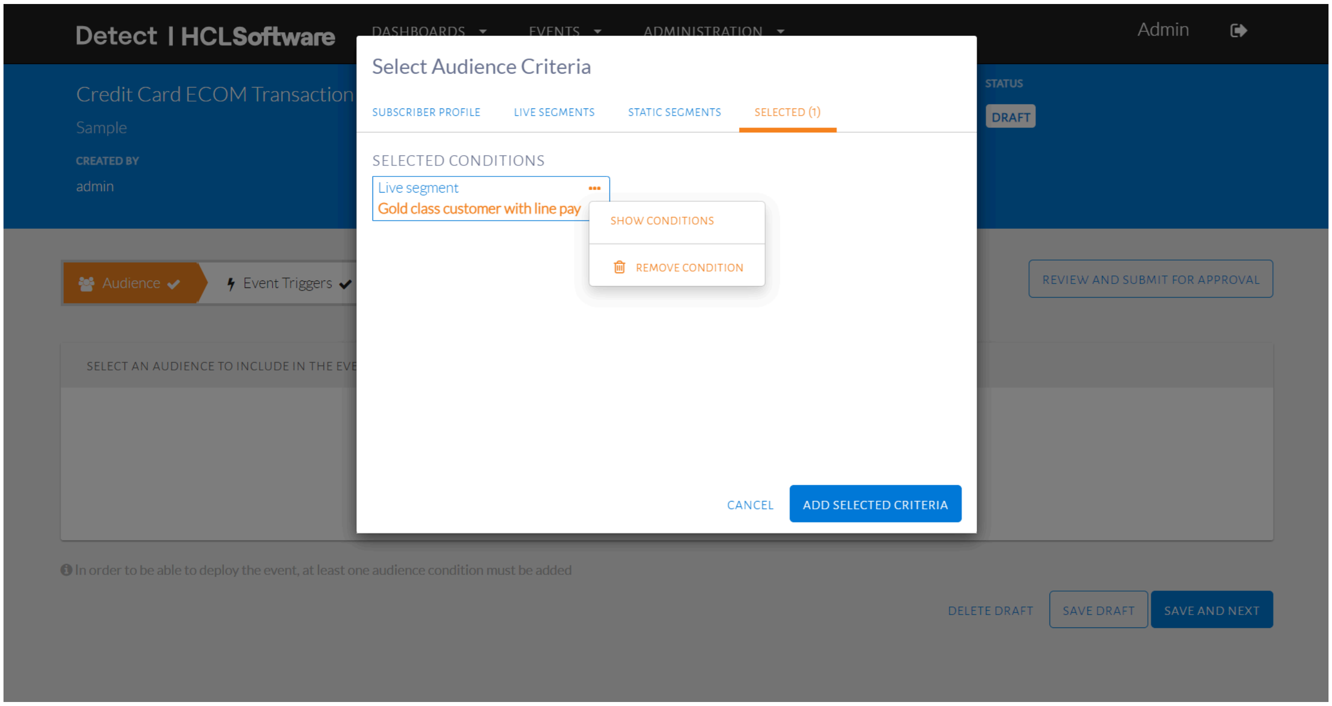
1. From the Audience Criteria pop-up, click the Live Segment tab.
2. Select name of live segment and click Add Selected Criteria.

Now, these audience conditions can be used when creating a new event. When selecting the audience conditions in a new event, go to the Live Segment tab, as seen in the image below. All the live segments created will be shown here.



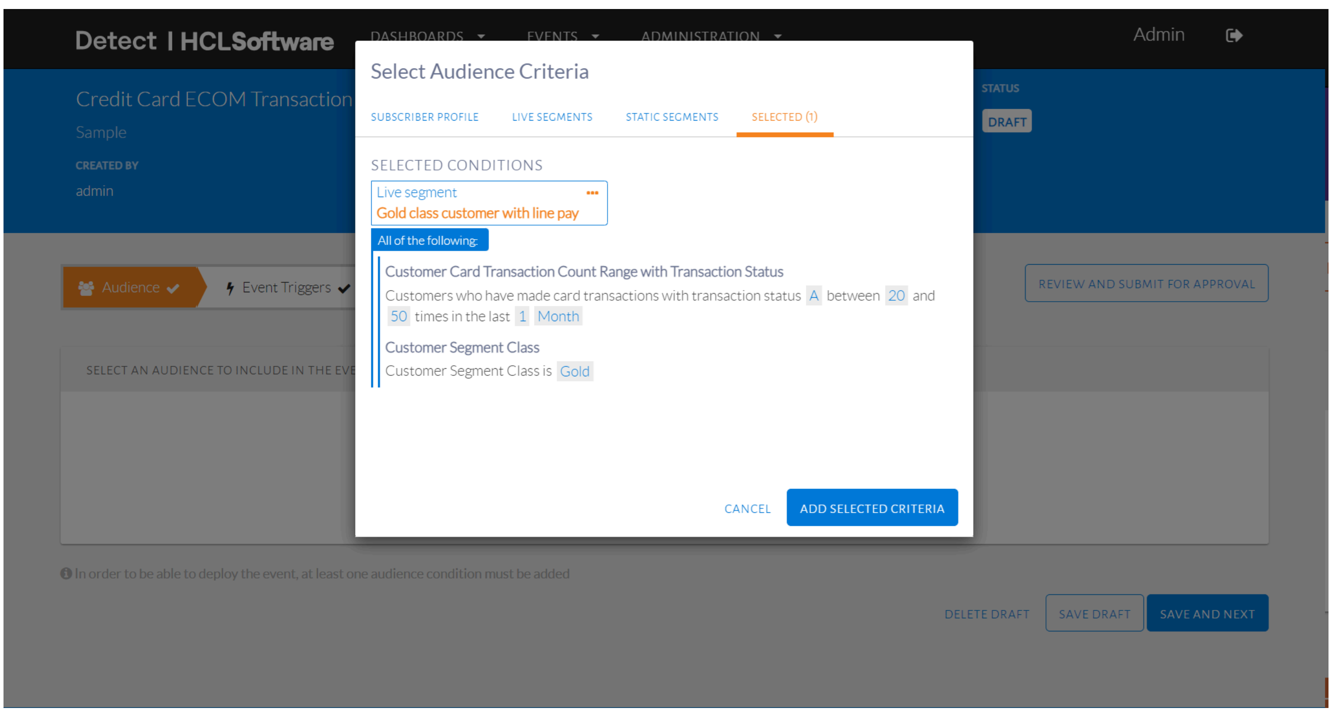
List of live segments in Live segments tab

On the Selected tab, the live segment can be seen as in the image below. Clicking the ellipses button beside it will allow the user to remove the condition or show conditions.



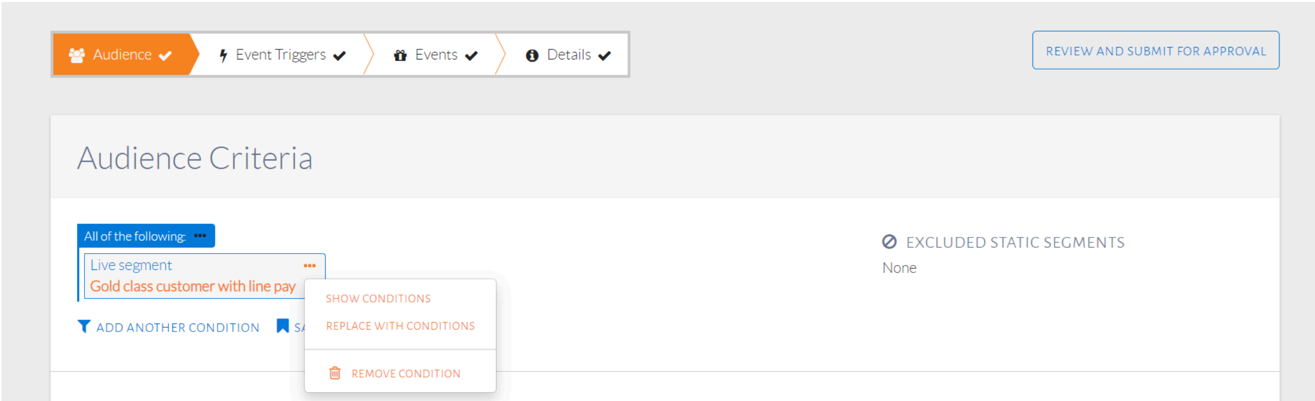
Show conditions or remove condition

Clicking Show Conditions will display the original conditions of the live segment, as seen in the image below.



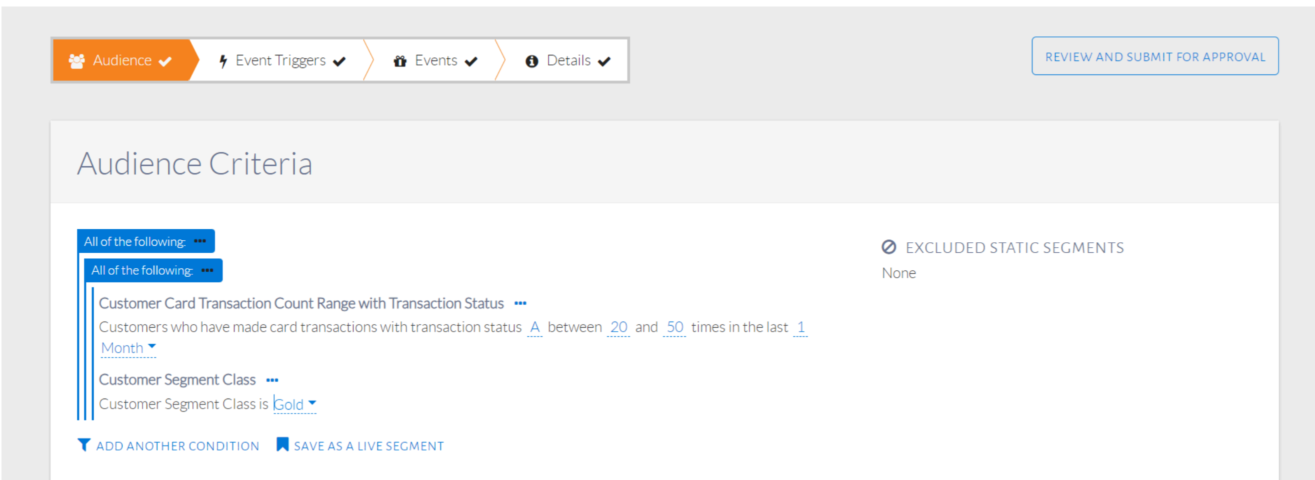
Show original conditions for a live segment

When a live segment is selected, clicking the ellipses button on the live segment will show similar options, as seen in the image below. Show Conditions will show the original conditions of the live segment.



Options for a live segment

Selecting Replace with Conditions will display the live segment with its original conditions and allow the user to edit their values, as seen in the image below.



Replace live segment with original conditions

Static Segments

A static segment is a saved set of customers. It is different from a live segment in the sense that a live segment saves audience conditions, which are the basis of selecting customers as part of that segment. A static segment, on the other hand, saves specific customers. These specific customers can be chosen through the events step of configuration. Once a customer is saved in a static segment, they will always be part of that static segment until explicitly removed by the user, unlike with live segments.

USE-CASE: Saving a Static Segment using a event

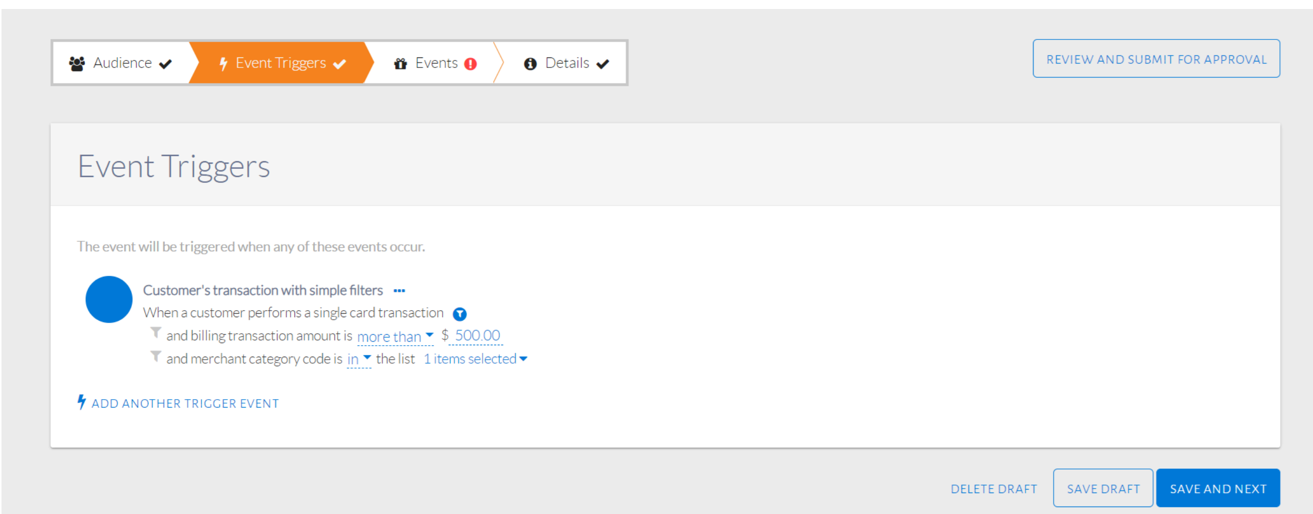
Save customers who receive an event into a static segment. The event audience is customers who have transacted at least once with the merchant category A-04-004 (LinePay) in the last 3 months and have a customer status of Active. The trigger is when a single transaction of more than NT $500 in the LinePay category.

Summary of Steps:

1. Set up the audience, trigger and event.
2. In Events, check Add/remove the subscriber from static segments after sending the event.
3. Select or create a static segment to add these customers into.

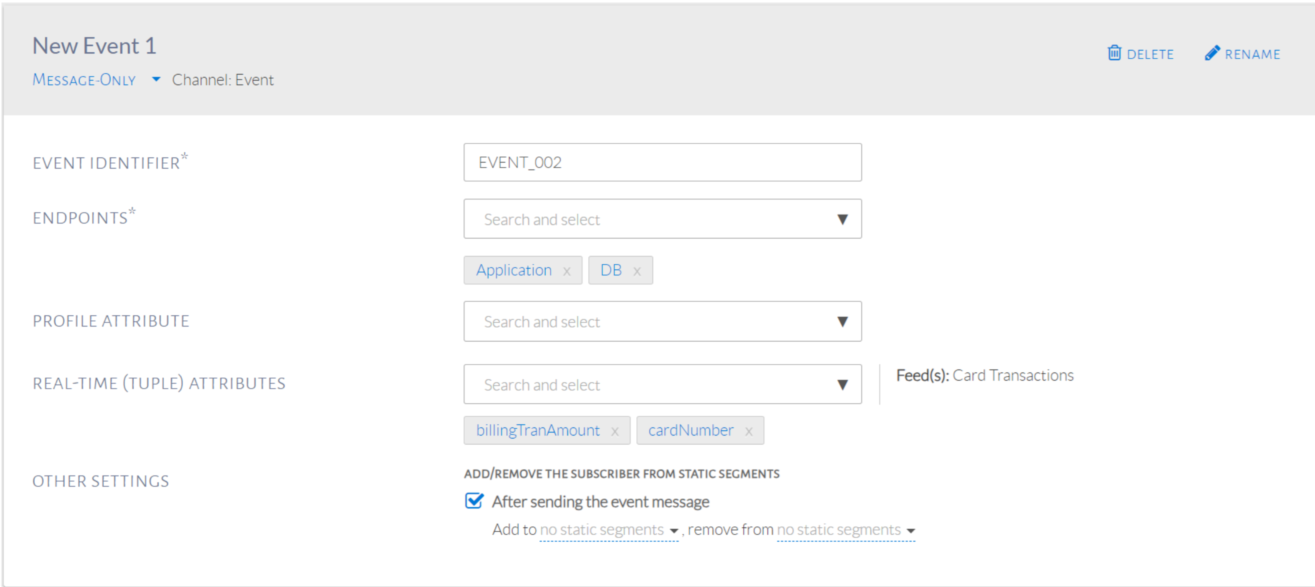
The set up is shown in the 3 images below.

Audience conditions



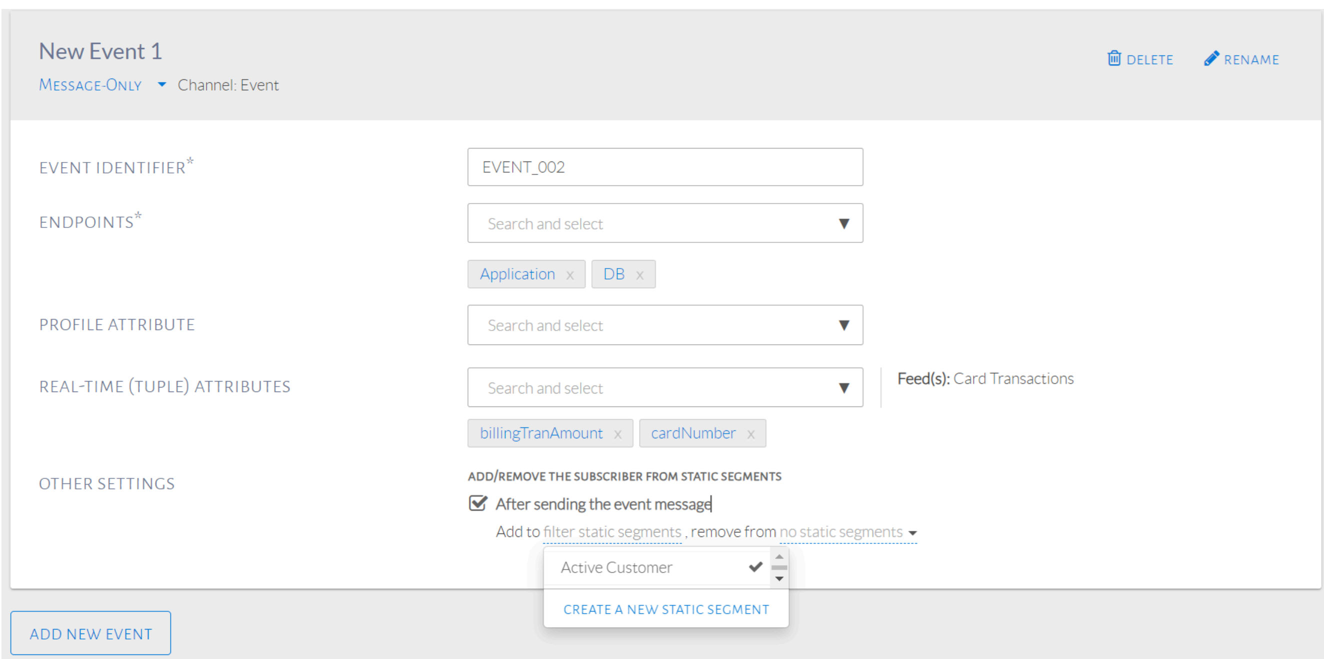
Trigger conditions

In the image below, the trigger configured is a single transaction of more than NT $500 in the LinePay category. This selection can be done quite easily through the tree selection criteria under the Mobile payment top category.



Event

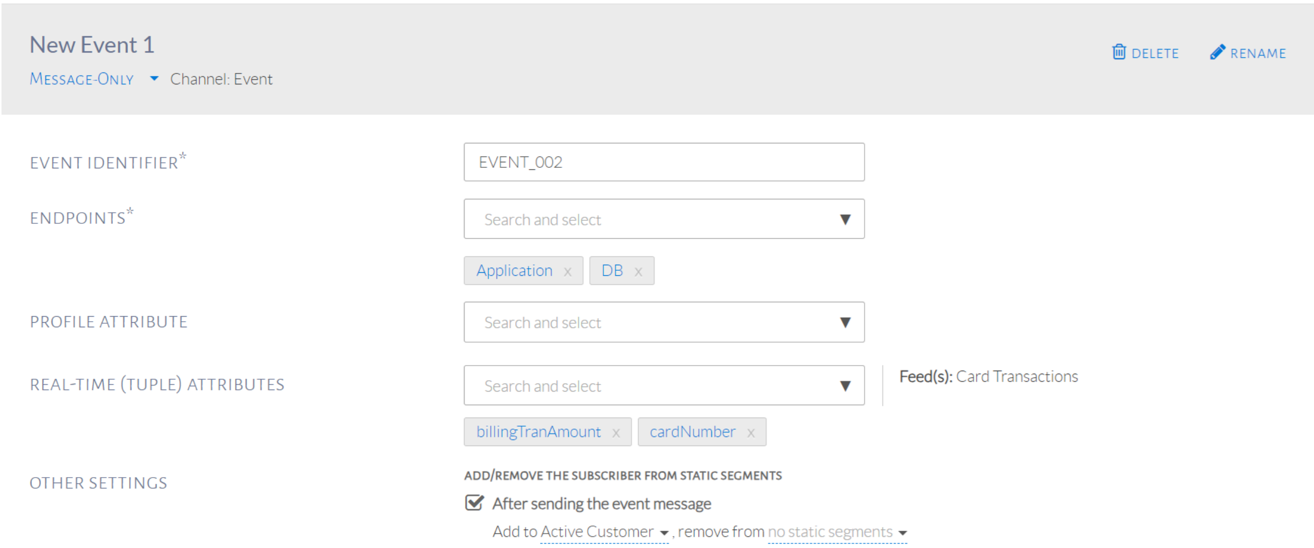
When setting up the event, there is an option to Add/Remove the subscriber from static segments after sending the event. Checking this box will provide the option to add the customer to a segment and/or remove from the segment. Both these are required to be static segments. This feature allows the user to keep track of the customers that triggered an event separately, by adding them to a new segment. It also allows to keep track of all the customers who have not triggered an event yet, by removing them from the current segment. This is seen in the image below. This option is available for all the types of events.



Add or remove subscriber from static segment

One or more static segments can be used to add the subscribers to, as seen in the image below. In this example, we choose to add the subscribers to Active Customers. This is a segment created by selecting the Create a New Static Segment option. A Name and Description needs to be added to create a segment.

One or more static segments can be chosen to remove the subscribers, in the same way. In this example, we do not remove the subscribers from any static segment, as seen in the image below.



Add to a static segment

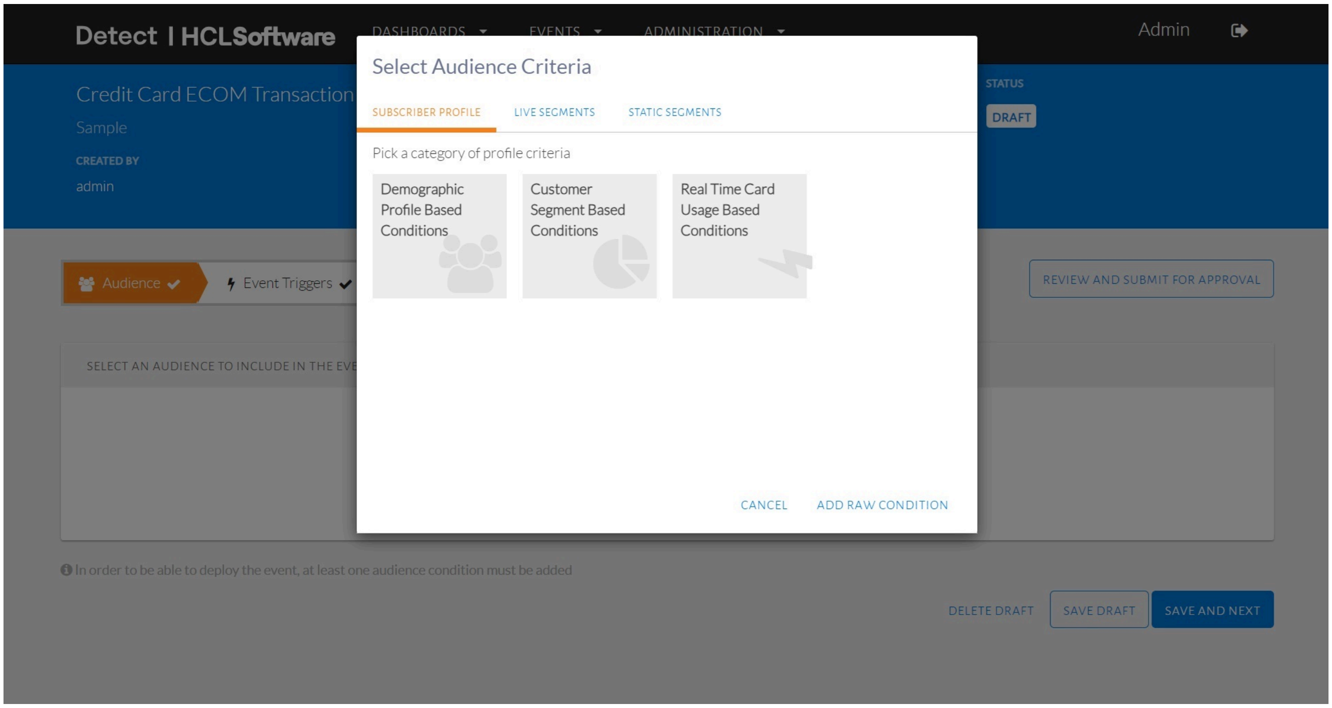
USE-CASE: Static Segment as Audience in an Event

Use saved customers from a previous event "Active Customers" as audience of a new event by using a static segment.

Summary of Steps:

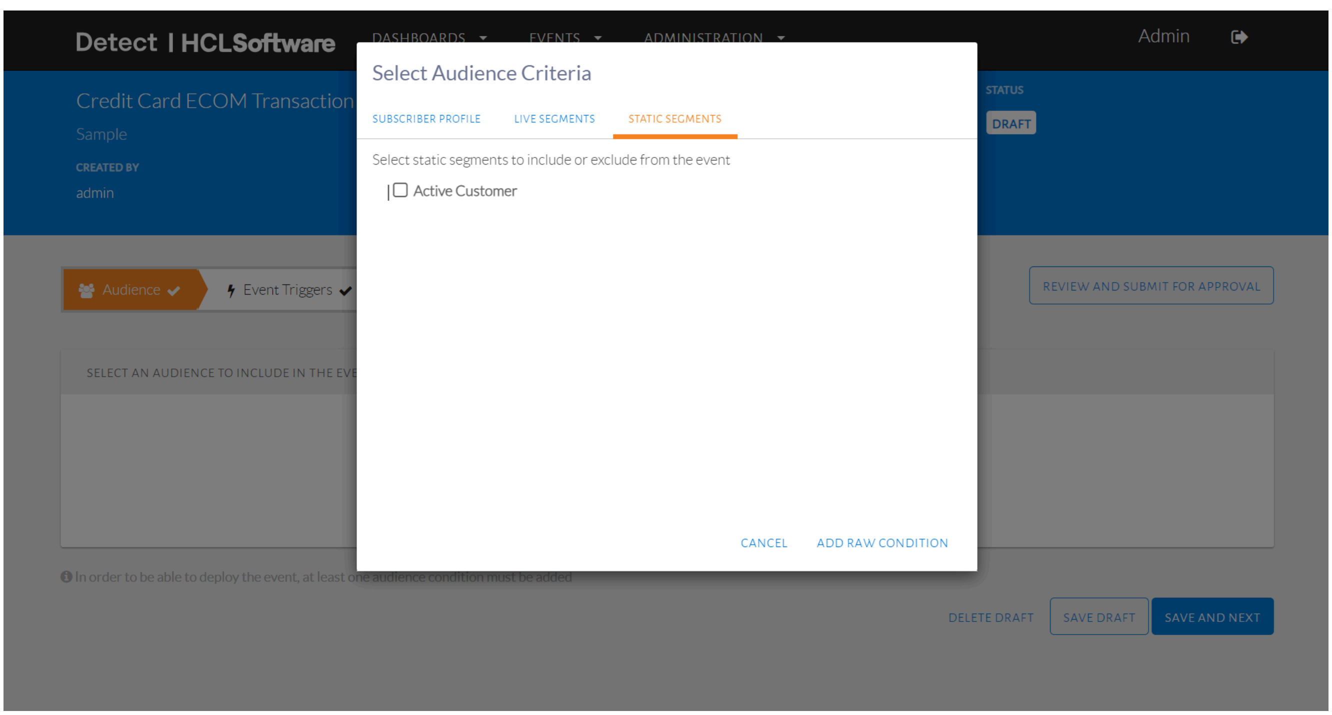
1. From the Audience Criteria pop-up, click the Static Segment tab.
2. Select name of static segment and click Add Selected Criteria.

This can be done by selecting the static segment as our audience condition. When selecting conditions, click the Static Segments tab, as seen in the image below.



Click the static segments tab in audience conditions

The saved static segments will be shown, as seen in the image below. Select Active Customers then click Add Selected Criteria.



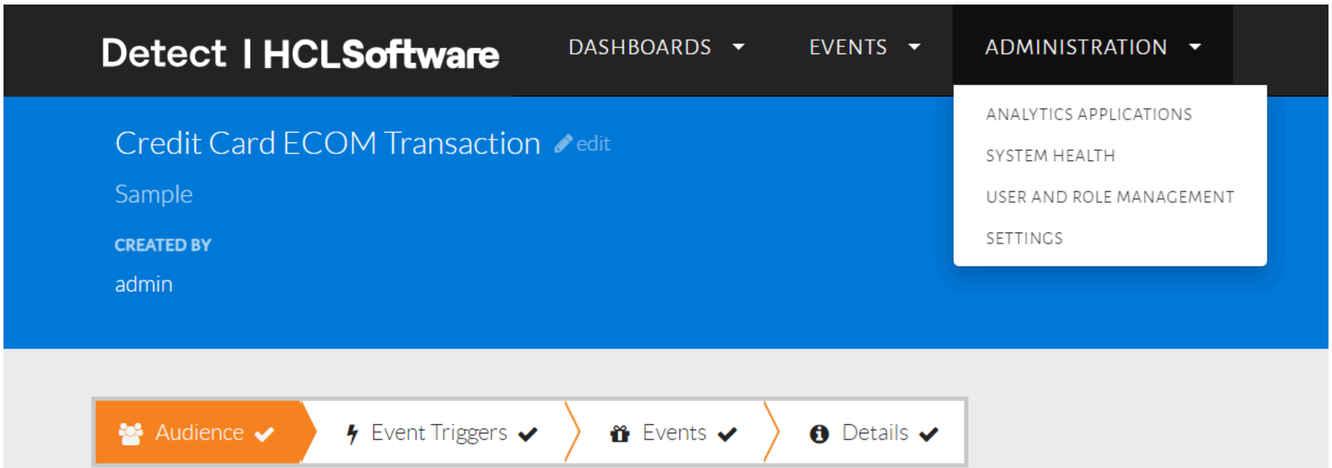
List of all static segments displayed

USE-CASE: View all Static Segments

Summary of Steps:

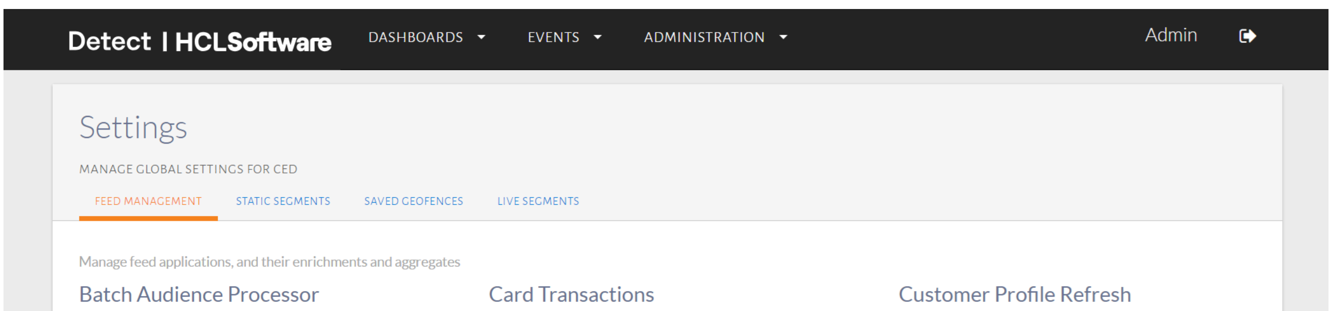
1. Click Administration in the top navigation bar.
2. Select Settings.
3. Go to Static Segments tab.

To view all static segments that are available for use, click Administration in the top navigation bar. Under this, select Settings as seen in the image below.



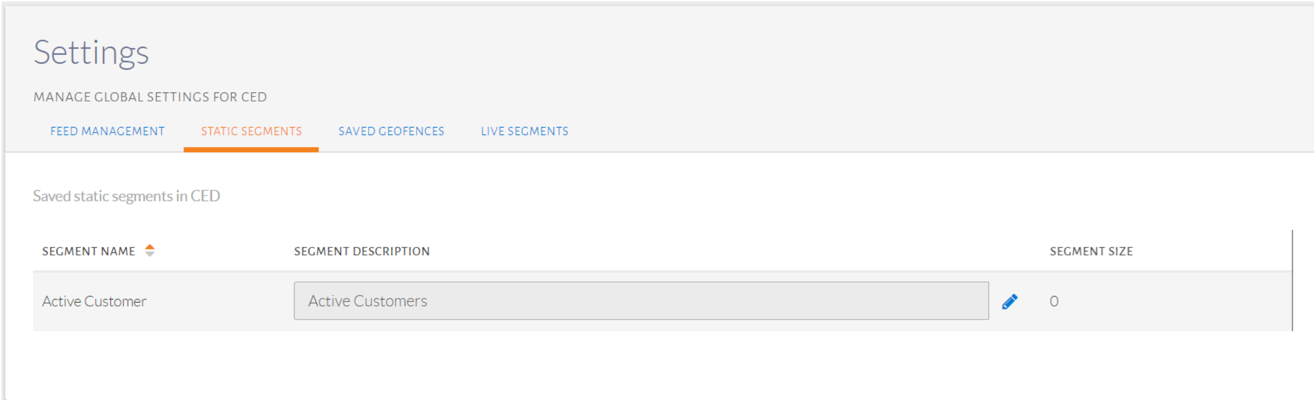
Go to Settings

A page will be displayed as seen in the image below. Select the Static Segments tab.



Select the Static segments tab

A page will be displayed as seen in the image below. The static segments can be seen along with a description for each. The segment size is also shown, which is the number of customers in each static segment. Similarly, all Live Segments can be viewed in its respective tab. Both of these tabs show all segments configured by any user as they are usable by any user.



List of all static segments

Adding Charts to an Event

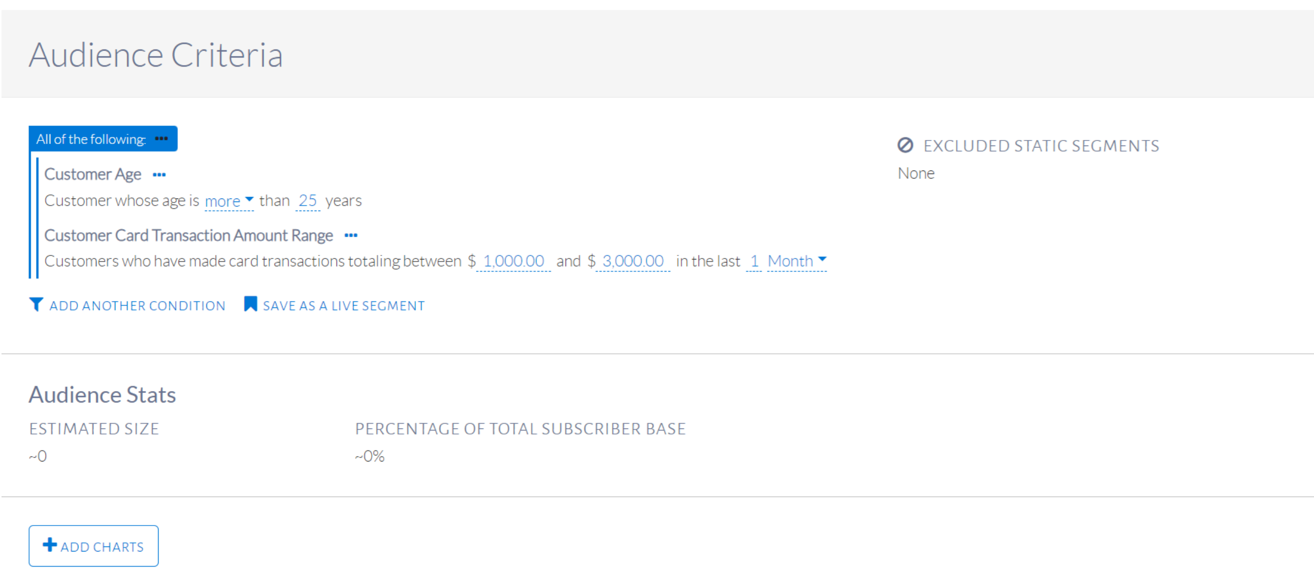
To better breakdown and understand the audience of an event, charts based on different metrics can be added.

USE-CASE: Display Metrics of Marital Status and Occupation Type Code

Summary of Steps:

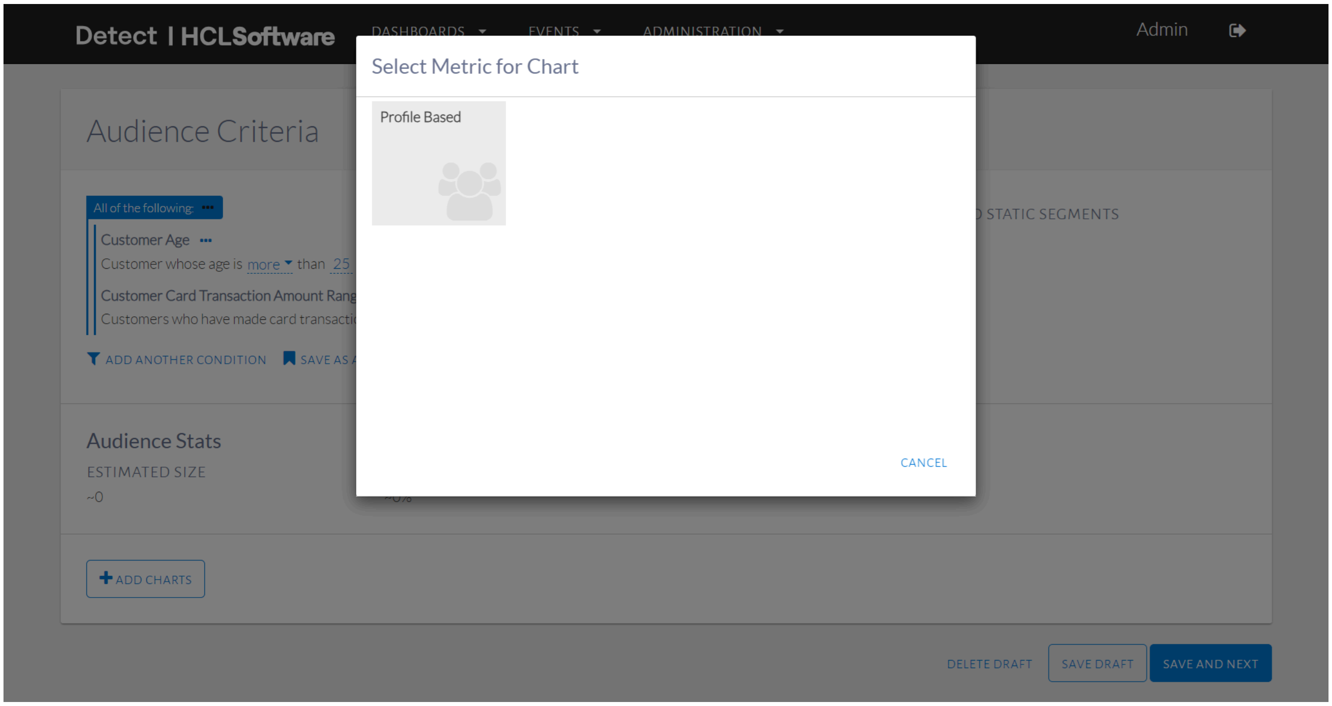
1. In the Audience Criteria page, click Add Charts.
2. Choose the category of the metric.
3. Check one or more metrics and click Add Selected Metric.

Set up audience conditions as seen in the image below. Click Add Charts button below the Audience Stats.



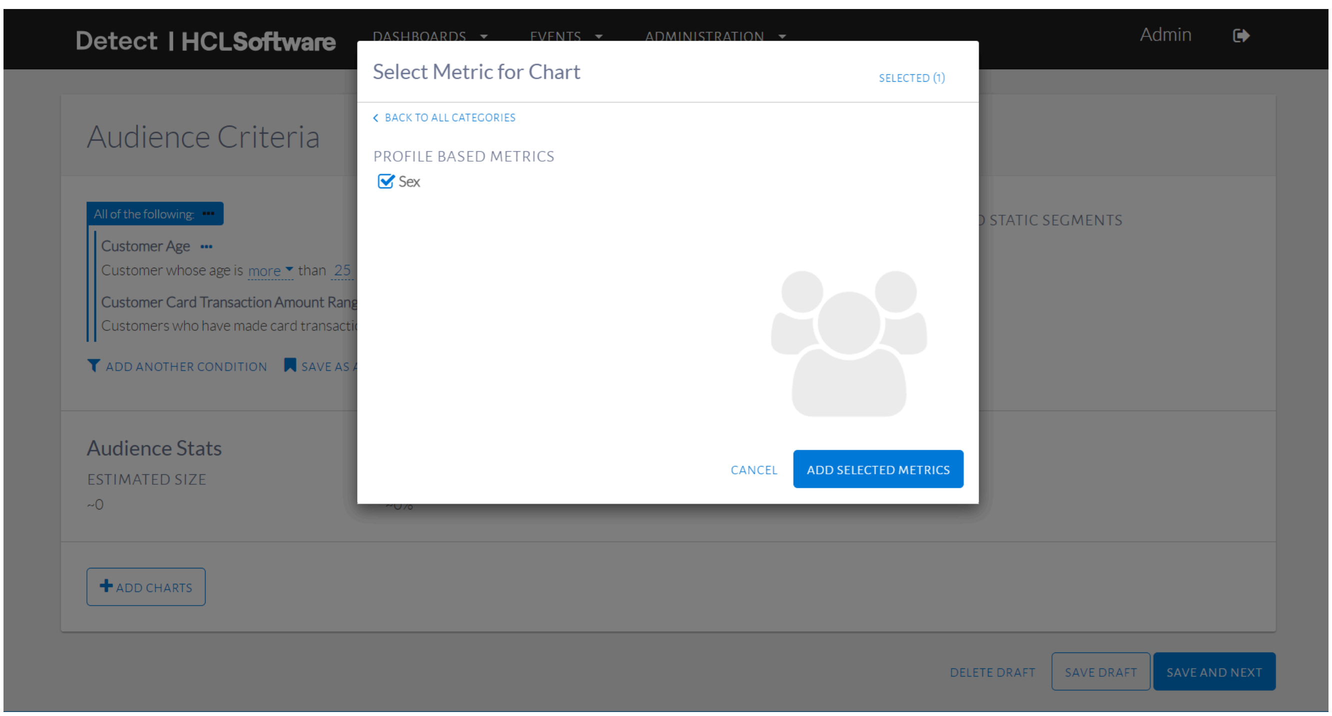
Adding a chart

A pop-up will be displayed as seen in the image below where different metrics for the chart can be selected.



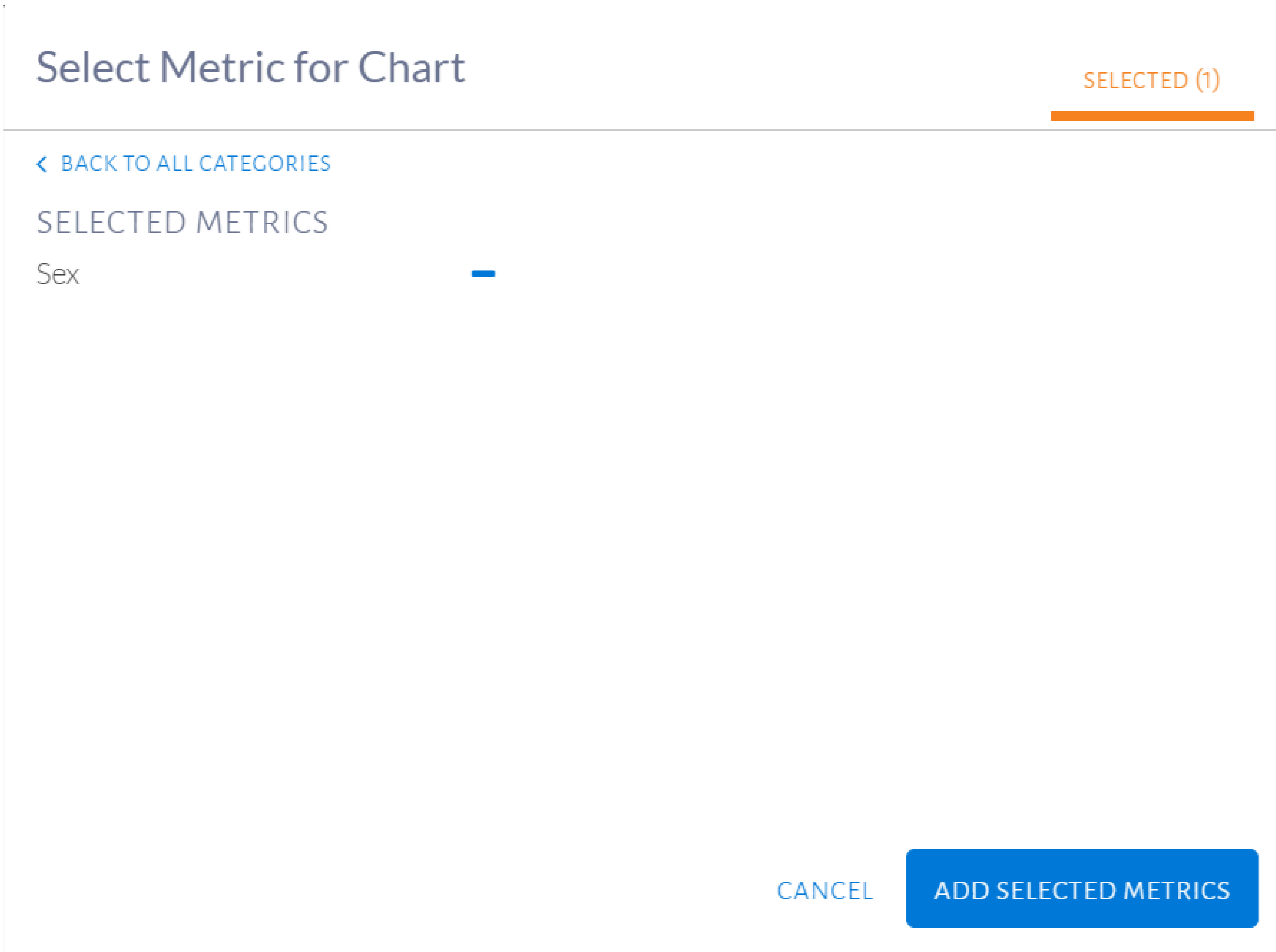
Selecting metrics for charts

In the Profile Based metrics, select Gender & Segment as seen in the image below.



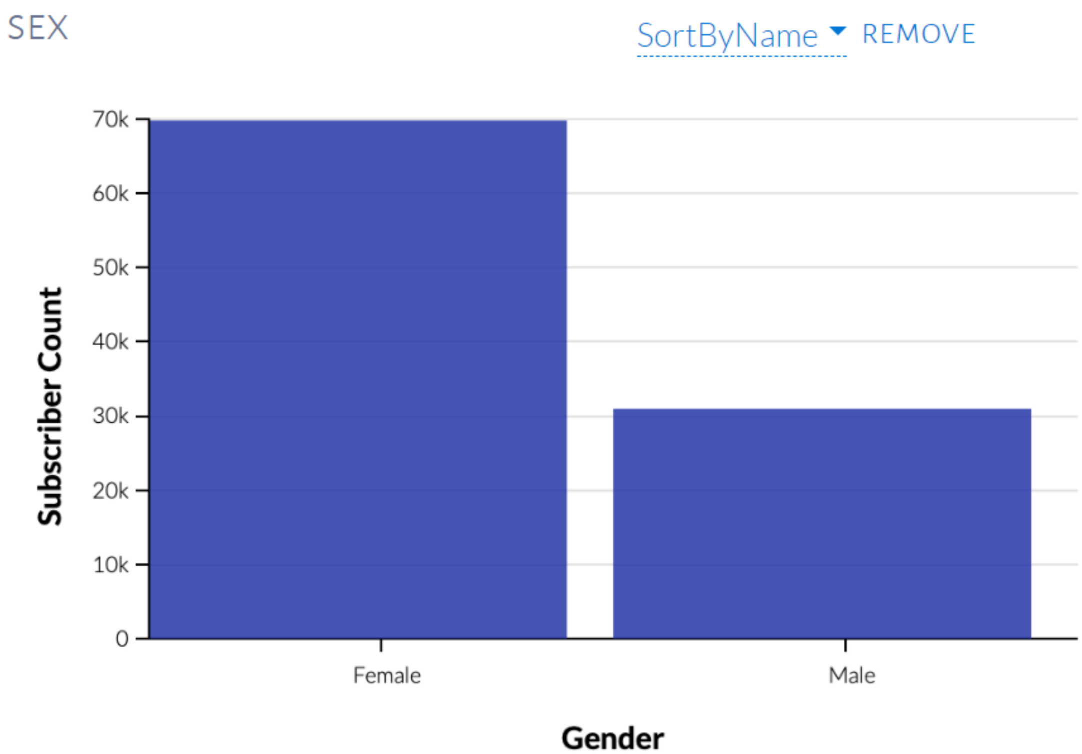
Choosing Profile Based metrics

The selected metrics can be viewed on the Selected tab. To remove a metric, click the - button beside it. Click Add selected metrics to proceed. The metrics selected produce graphs as shown in the image below.



Remove selected metrics

The metrics selected produce graphs as shown in the image below.



Audience metric charts

These charts can be reordered by hovering over the top right corner of each, as in the image below.

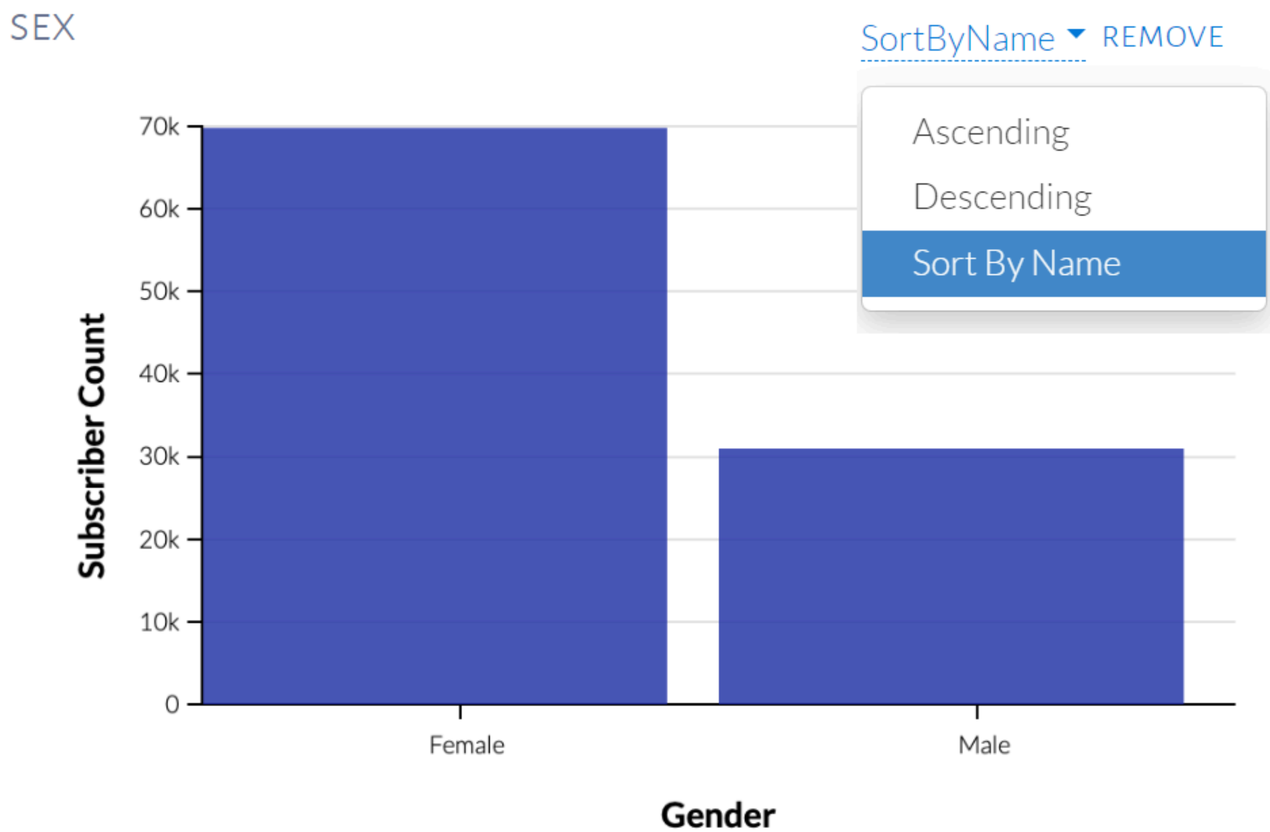


Chart options

Non-categorical charts have options to alter the time window and clicking the + and - buttons allows an increase or decrease the number of bars in the chart. This allows for a change in the range of each bin, as seen in the image below.

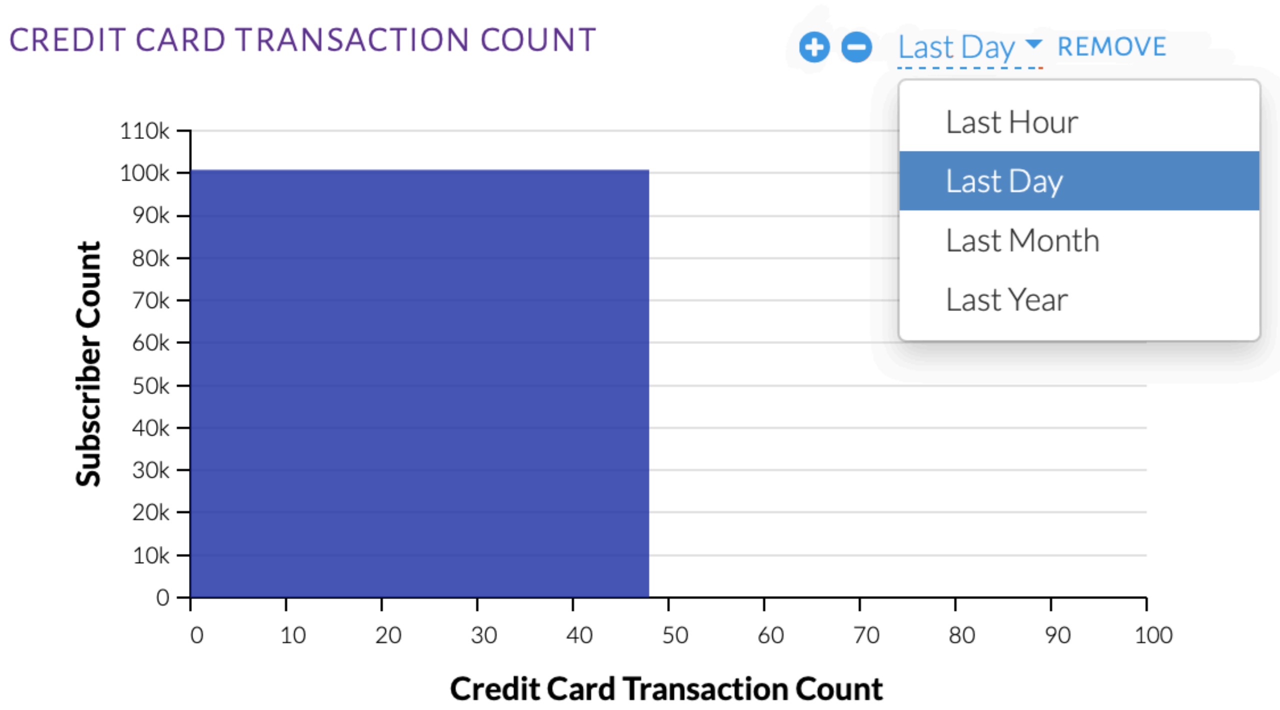


Chart options

Trigger Conditions

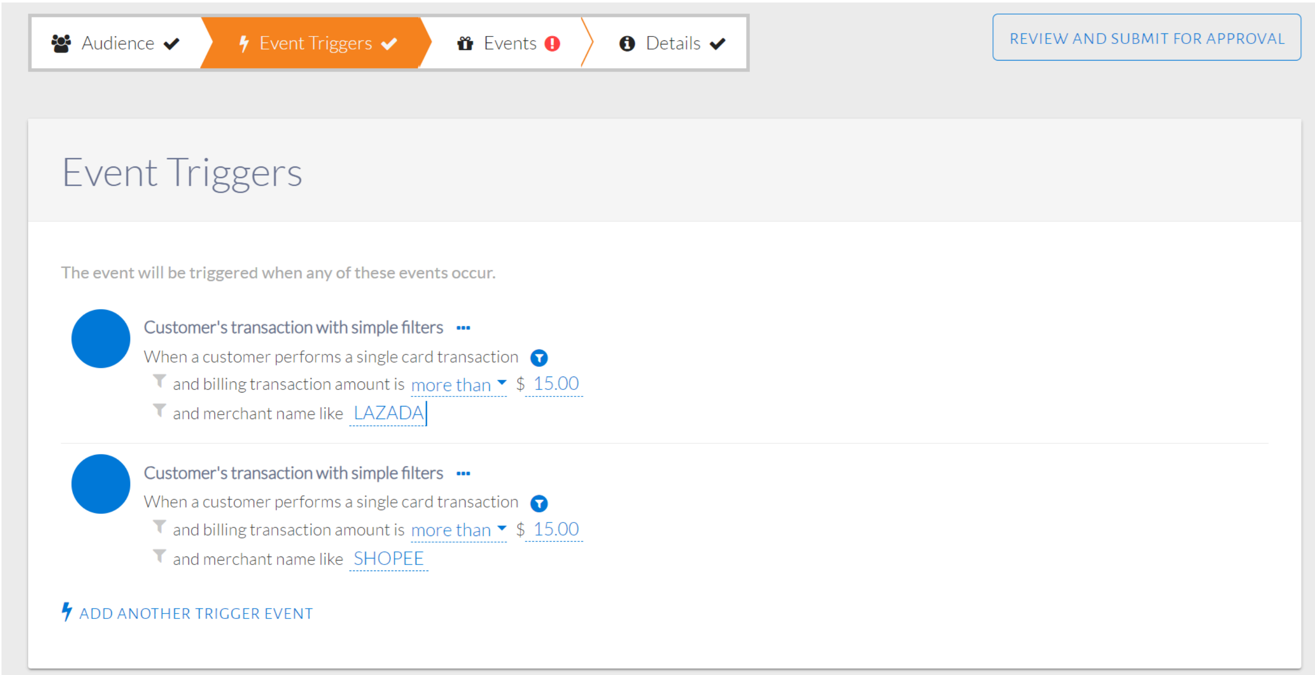
A number of options are available when selecting trigger conditions for an event. For better understanding of these options, we will explore different use-cases.

Multiple Trigger Conditions

An event can have more than one trigger condition. If more than one trigger is used, a customer can satisfy at least one to be qualified. This is similar to the Any of the following condition group.

USE-CASE: Trigger is when a customer makes a transaction worth more than NT $1,500 with 5,000 MP001 points or 10,000 BP001.

The trigger will be set up as seen in the image below.



Multiple triggers for an event

Raw Trigger Condition

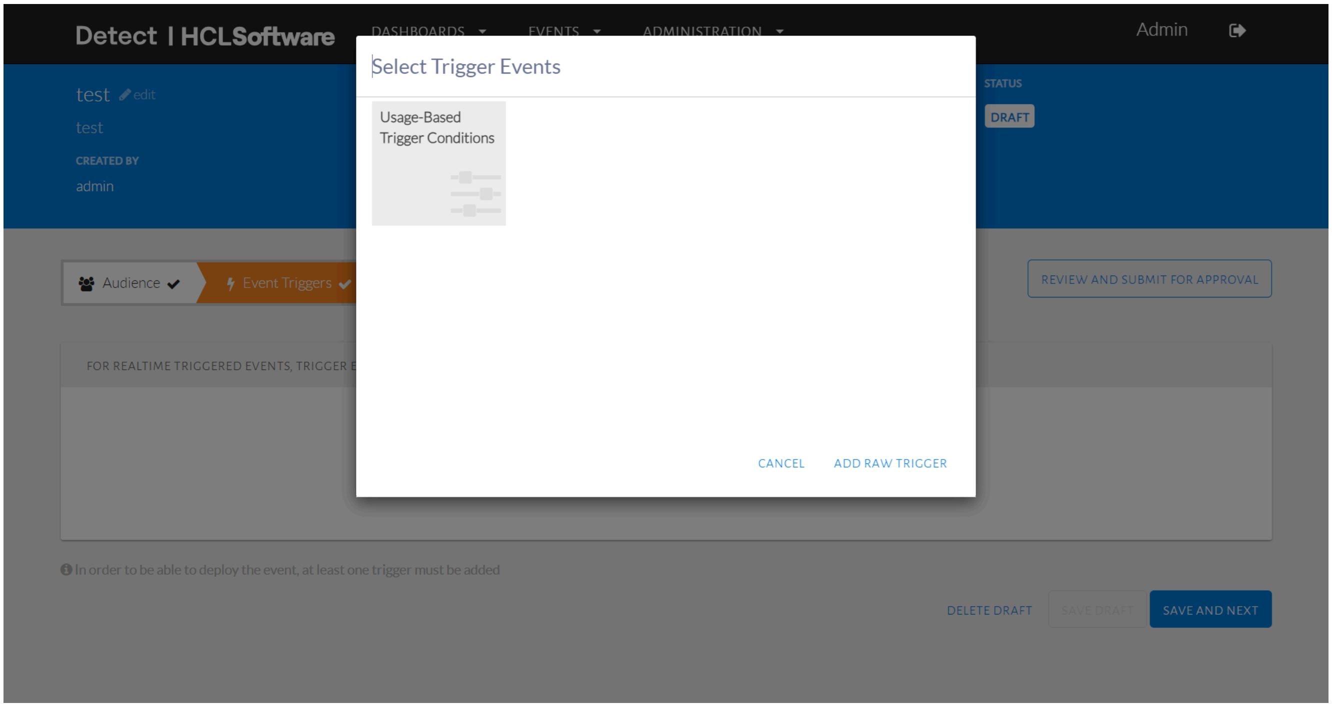
A raw trigger condition is a customized trigger condition. There may be a need to create a raw condition if the condition required cannot be found in the lists provided.

USE-CASE: Trigger is when a Freshers card is used to transact abroad

Summary of Steps:

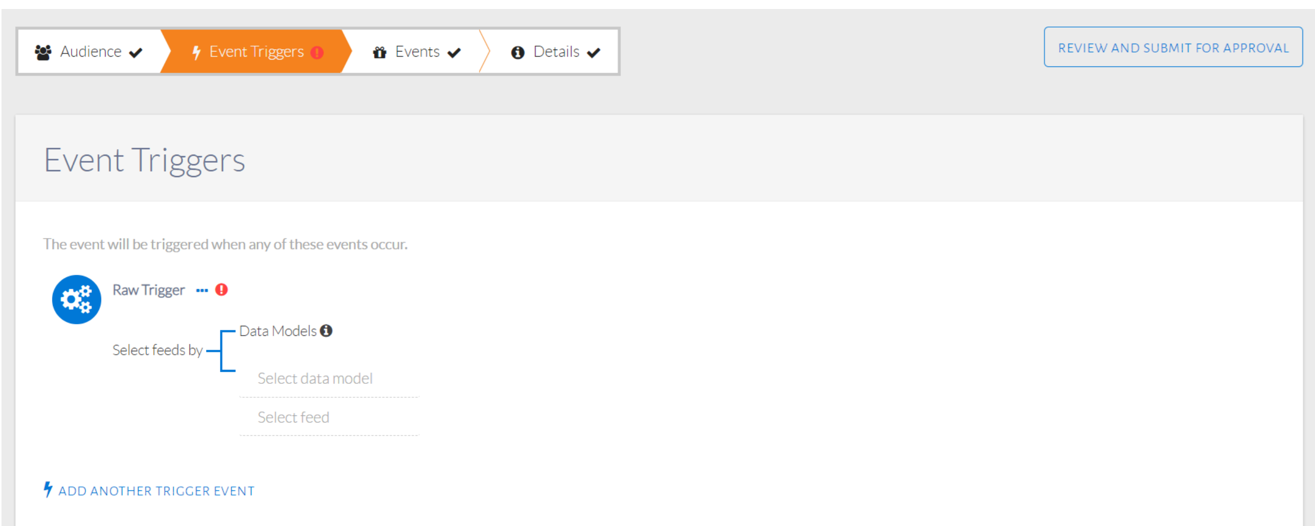
1. From the Trigger Events pop-up, click Add Raw Trigger.
2. Select the Feed Name for the trigger to monitor.
3. Select an attribute/aggregation to filter by.
4. Set values of the chosen attribute/aggregation in condition.
5. Click the ellipses (...) on the condition group to add another condition.

From the Trigger Events pop-up seen in the image below, click Add Raw Condition.



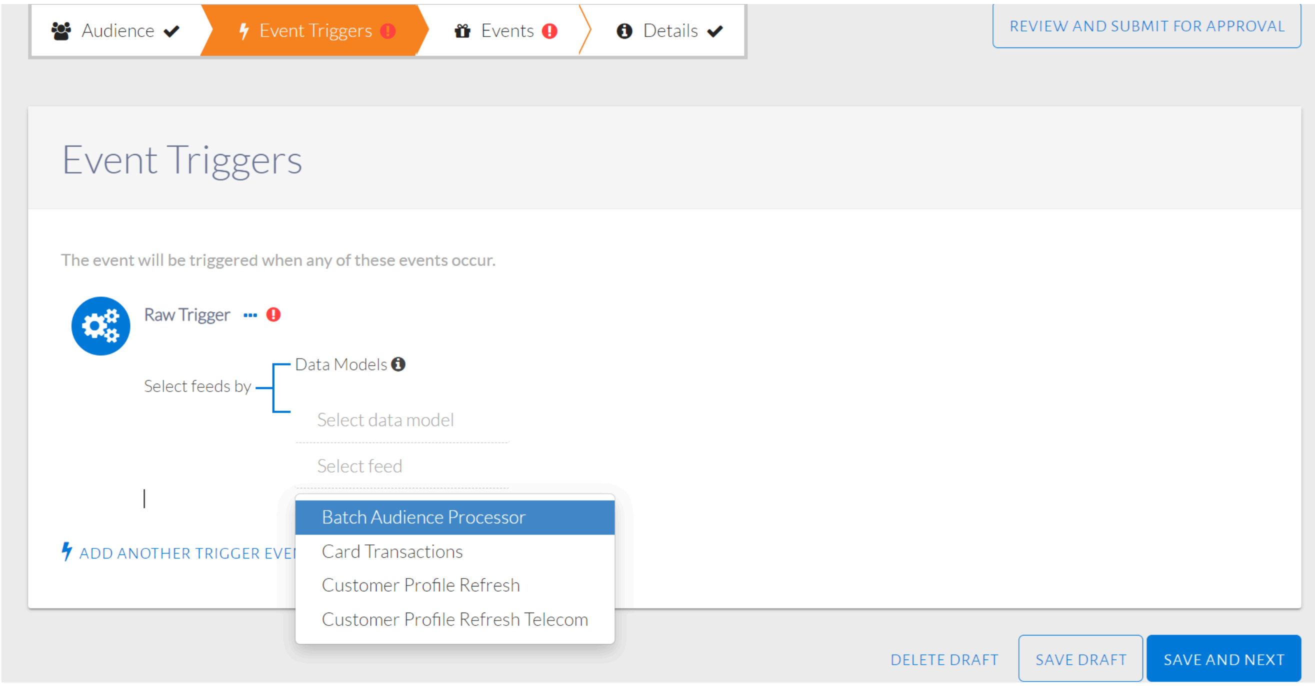
Add Raw Trigger Condition

The raw trigger will be displayed as in the image below where the user can select either a Feed Name or a Data Model for the trigger to filter by. A Feed is an organized set of attributes or aggregates. A Data Model is an abstract model that can be applied to different feeds.



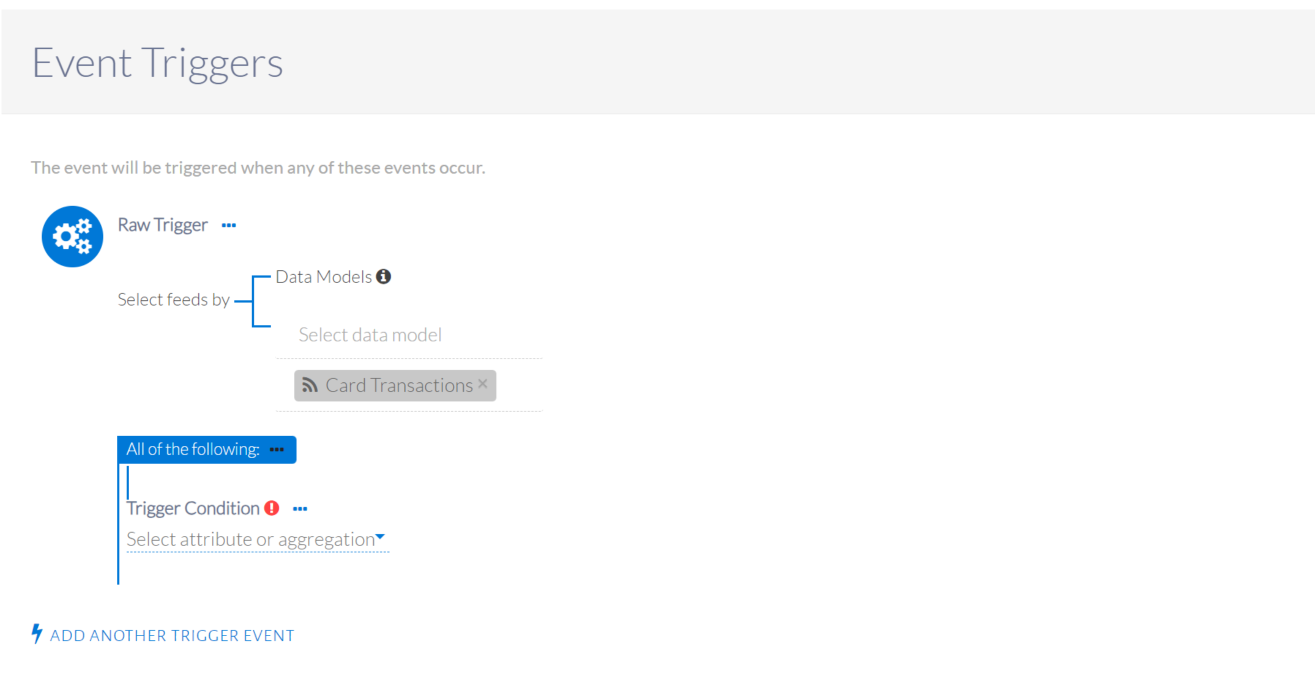
Raw trigger condition displayed

Clicking on Select feed will display the list of feed names to choose from, as seen in the image below. Each of these feeds contain sets of related attributes and aggregations. Select Feed Name as Transaction Based Triggers which represents the real-time credit card feed.



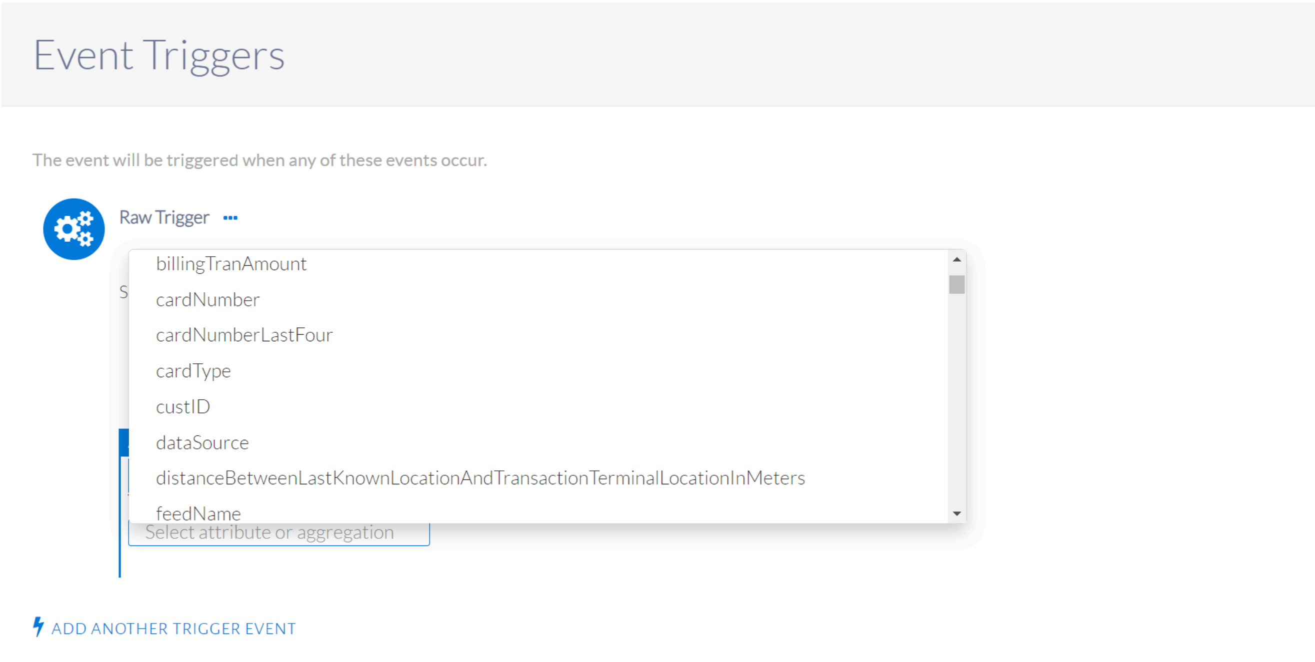
Filtering by feed name

Choosing this feed will display a condition group where the attribute or aggregation to be filtered by can be selected, as seen in the image below.



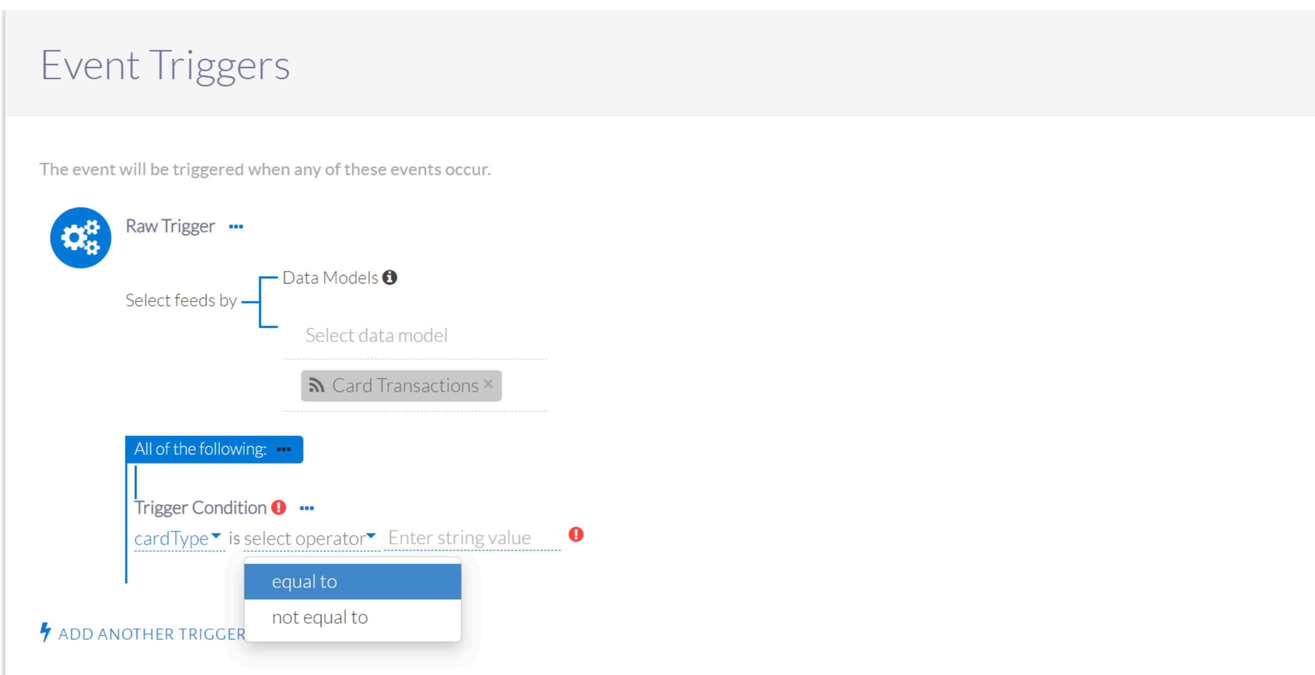
Choosing the Credit Card Transaction feed

A list of attributes and aggregations available for that feed will be displayed, as seen in the image below. Select transactionType. In our example, both attributes are expected to be present in Credit Card Transaction feed, otherwise another feed can be selected here.



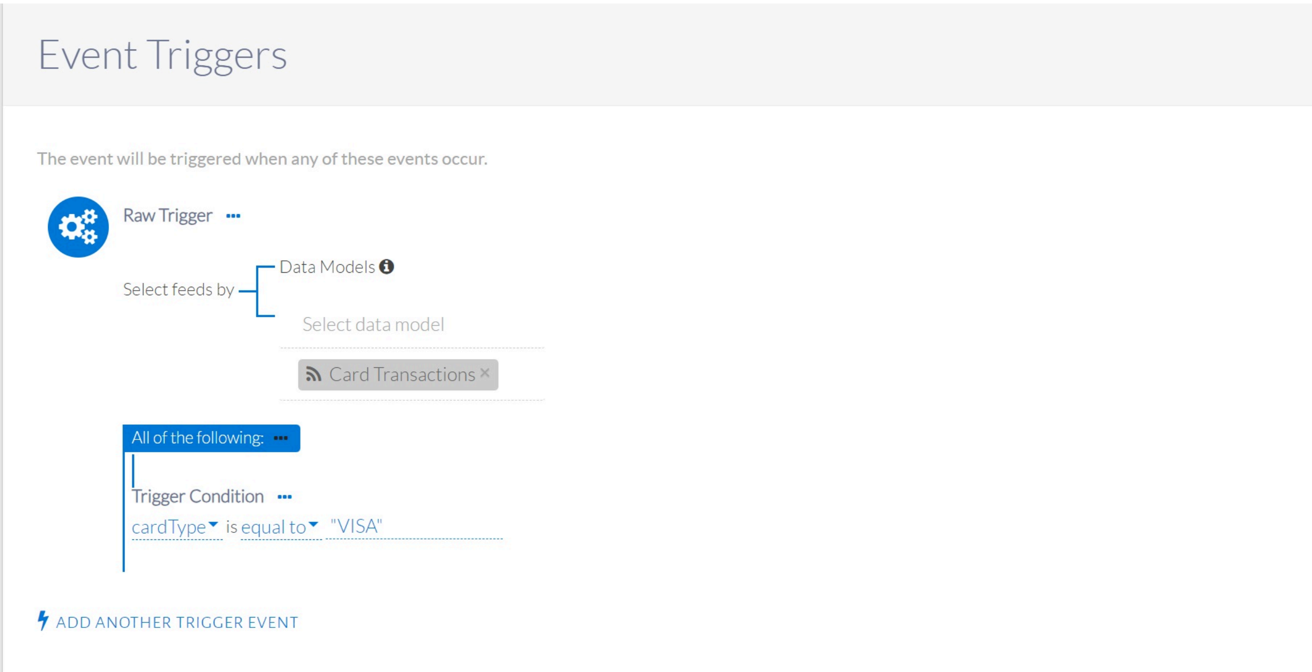
List of attributes and aggregations

Please select cardDescription and transactionCountry, which is equal to "Freshers" and "TW" respectively, in this example. The cardDescription attribute will be displayed, as seen in the image below.



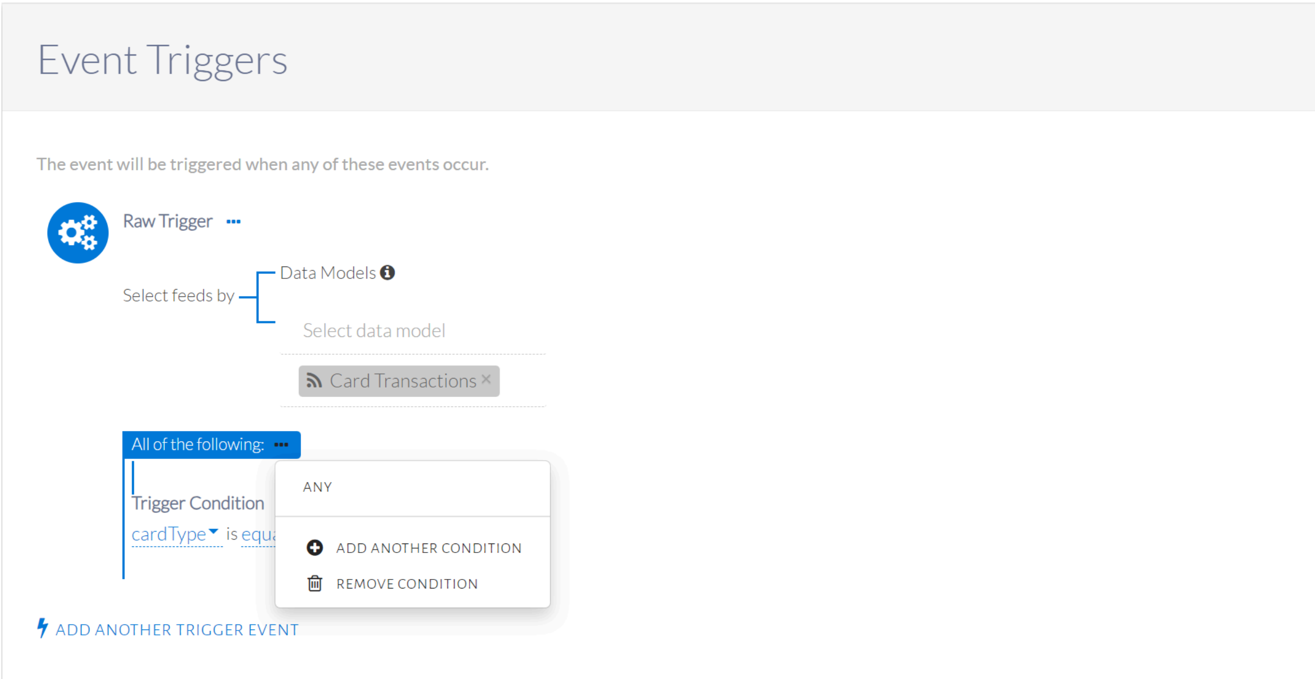
Setting up first condition of raw trigger

The operator will be displayed, as seen in the image below. Type the value that represents Freshers cards in the space provided, enclosed in double quotes as this is a String. The appropriate error condition will be displayed that can be used as a hint to what type of value is expected like a string, integer (number) or boolean (true/false).

=

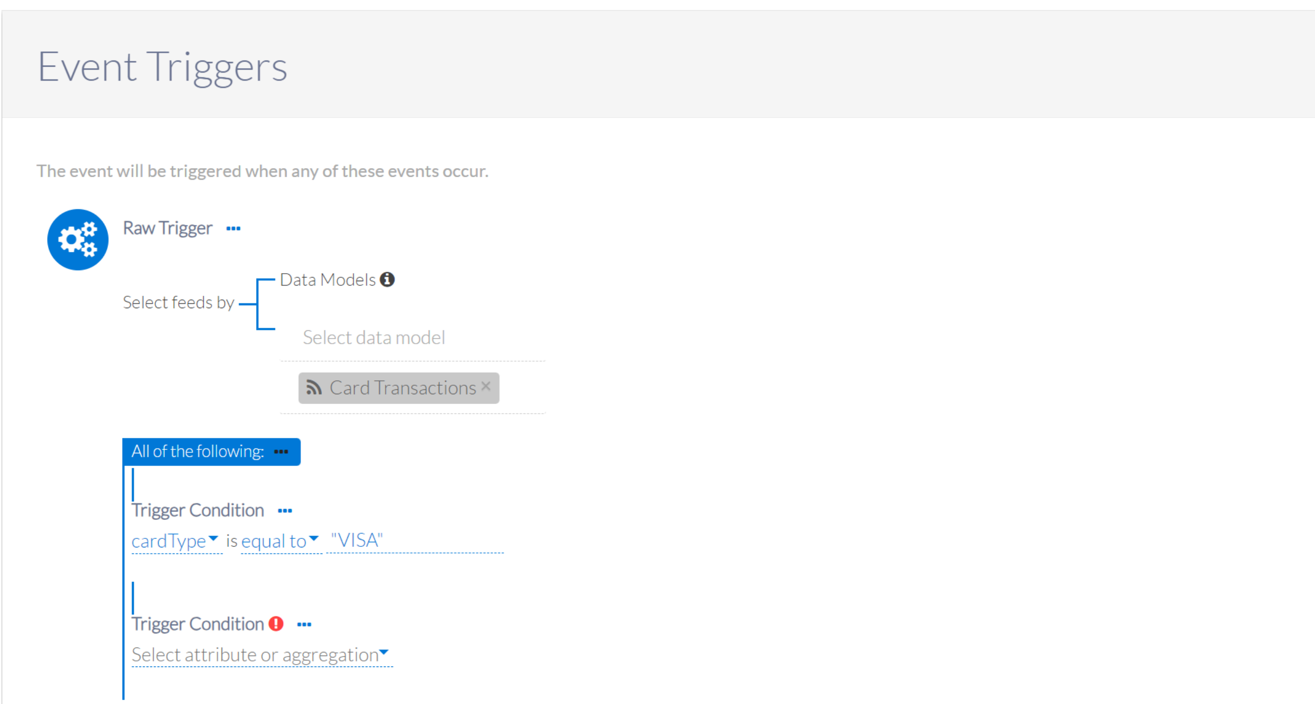
Specifying the transaction type enclosed in double quotes

Click the ellipses on the condition group to add another condition within that group, as seen in the image below. In our example, both attributes are expected to be present in Credit Card Transaction feed, otherwise another feed can be selected above.



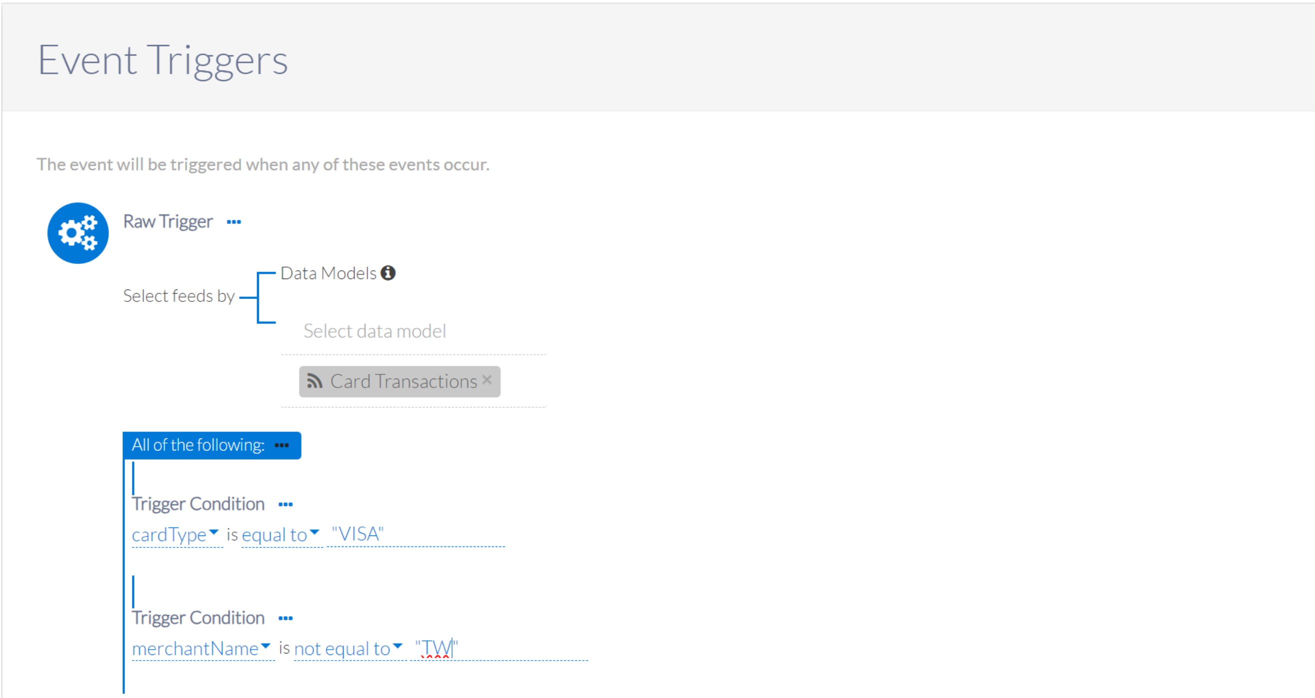
Options for trigger condition

A new raw trigger condition will be displayed, as seen in the image below. Specify transactionCountryCode values. This will be kept as an ALL condition group.



New raw trigger displayed

The final set of trigger conditions can be seen in the image below.



Final trigger conditions

The second condition filters whether the transaction has occurred abroad or not. The transactionCountryCode refers to the country where the transaction occurred. The code for Taiwan is TW, therefore a code not equal to TW refers to a transaction abroad. Note that the value for this condition is enclosed in double quotes.

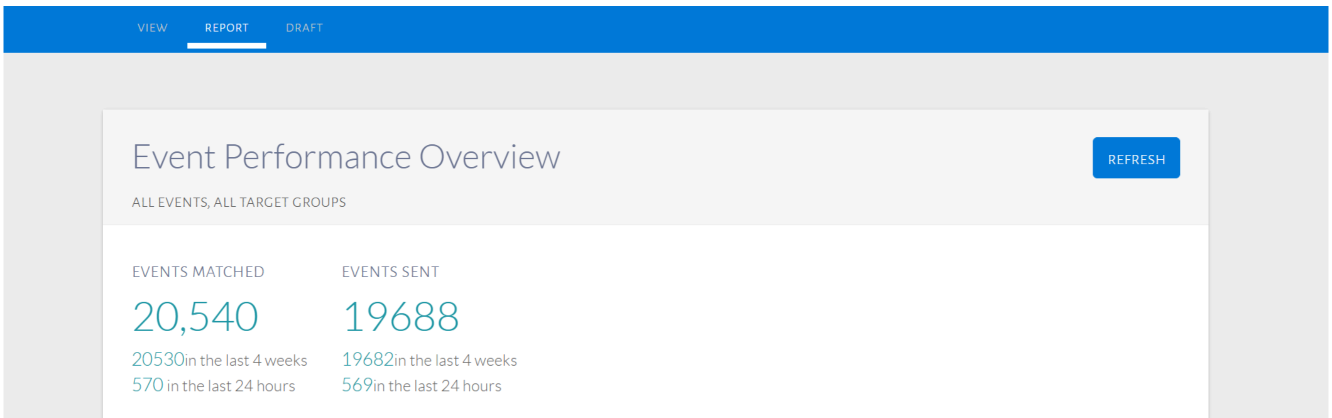
Chapter 6. Tracking an Event

To better understand the steps for tracking an event, let us track an event with the following objective: to encourage customers with at least 1 ECOM purchase in the last month to buy items worth at least NT 15,000 from Sports Goods.

Overview

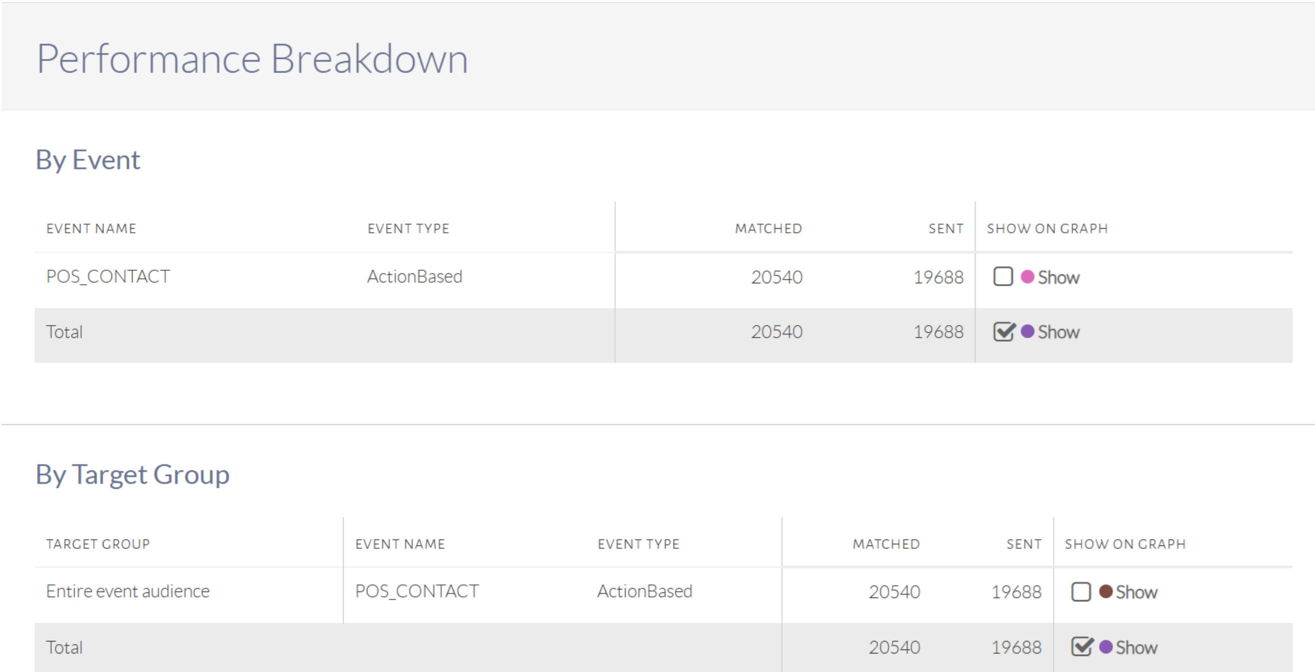
Click events in the left navigation bar and select All events. Select the event to track from the list of running events presented.

Once an event is selected, two tabs are shown, as seen in the image below. The View tab shows a summary of the audience, trigger, event and details. The Report tab allows tracking the responses of customers. Select the Report tab.



On the **Report** tab, event Performance Overview displays data about the Events Matched, Events Sent, Events Redeemed, Response Rate and Average Response Time. A bar chart visualizing this data is also shown, as seen in the image below.

Performance Breakdown allows the user to track the performance of each event as well as the performance of each target group, as seen in the image below.


Performance Breakdown

By Event

EVENT NAME	EVENT TYPE	MATCHED	SENT	SHOW ON GRAPH
POS_CONTACT	ActionBased	20540	19688	Show
Total		20540	19688	Show

By Target Group

TARGET GROUP	EVENT NAME	EVENT TYPE	MATCHED	SENT	SHOW ON GRAPH
Entire event audience	POS_CONTACT	ActionBased	20540	19688	Show
Total			20540	19688	Show

Details

Event Performance Overview

Events Matched refers to the number of customers that qualified to receive the event. For this sample event, the number is 20,540.

Events Redeemed refers to the number of customers that have redeemed the event and are given a product. For this sample event, the number is 73. Since the event for this event is an Action-Based event, these are the number of customers who have done the action. For Message-Only events, the Events Redeemed will be 0.

Response Rate refers to the Events Redeemed divided by the Events Sent. Average Response Time refers to the average amount of time it takes for customers to redeem the event. Both are in reference to Action-based Events.

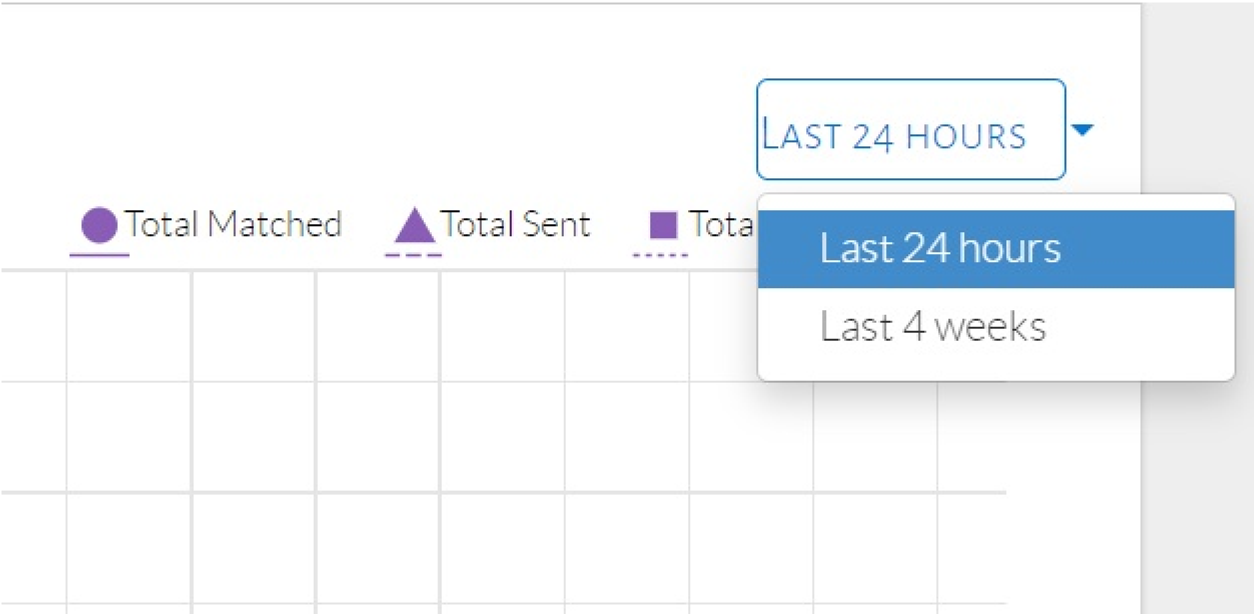
Performance Breakdown

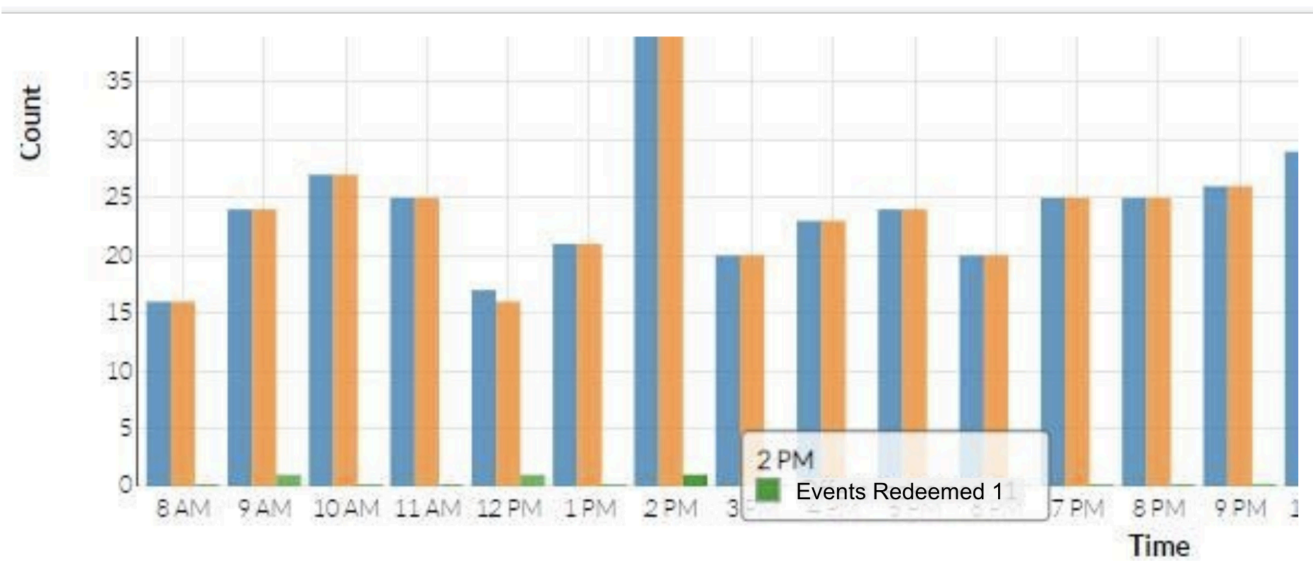
Performance breakdown By Event shows the performance of each event. Each Event name and Event type is shown, along with its Events Matched, Events Redeemed as shown above. In this sample event, New Event 1 is the only event given.

Performance breakdown By Target Group shows the performance of each target group. Each target group is shown along with the Event name, Event Type, Events Matched, Events Redeemed, for each one. In this sample event, there is no target group, so data on the entire event audience is shown.

Charts on Report

For charts shown on the Report tab, the time window displayed on the chart can be changed, as seen in the image below. More details about a point on the chart are displayed by hovering the mouse over it as seen in the last image.





Displaying more details about point on chart