Unica Centralized Offer Management V12.0 Administrator's Guide

Contents

Chapter 1. Offer administration concepts

Offer administration concepts include:

An introduction to offers

An offer is a specific marketing communication that you send to a group of people, using one or more channels.

An offer can be simple or complex, and typically contains:

- a creative piece
- a cost
- a channel
- an expiration date

For example, a simple offer from an online retailer could consist of free shipping on all online purchases made in the month of April. A more complex offer could consist of a credit card from a financial institution, with a personalized combination of artwork, introductory rate, and expiration date that varied based on the recipient's credit rating and region.

In Centralized Offer Management, offers are based on the offer templates that you administer.

An introduction to offer templates

Offers can be created using offer templates and if required, without templates. Offer templates include standard attributes, such as Offer name and Channel.

An offer template defines the structure of an offer. You can create offer templates, as required, to manage the different types of offers within the business. When defining an offer template, specify the relevant offer attributes and how they will be used.

Offer templates provide the following benefits:

- By creating offer templates, you simplify offer creation for users because only the relevant offer attributes for an offer is shown.
- By providing default values for offer attributes, you speed up the offer creation process.
- By specifying which offer attributes are parameterized in an offer template, you control when new offers are created and when an offer version can be used instead.
- By using custom attributes to capture specific data (for example, the discount percentage or bonus points associated with the offer), you enable better reporting and analysis of campaigns.

Administrators can also create custom attributes and add them to offer templates. Any offers that are based on that template will include custom attributes.

An example of a custom attribute is a drop-down list of Interest Rates, which the users can select when they create an offer.

Offer templates and security

The security policy you set for an offer template determines which users will be able to use the offer template.

The security policy of the offer template is independent of the security policy applied to the offers created by using this offer template; that is, the security policy is not propagated to offers based on the template.

When users create new offers, the security policy of the offer is based on the folder in which it resides. If the folder is created in the top-level offers folder, the user can select other valid security policies for that offer.

To work with offer templates, which includes tasks such as adding, editing, or retiring offer templates, you must have the appropriate permissions, which includes the view permission for offer templates. For example, to add offer templates, you must be granted both the Add offer templates and View offer templates permissions.

Planning offer templates and offers

Before creating an offer, you should make a few decisions for an appropriate offer creation.

The decisions are:

- Which template to use
- Which attributes will be parametrized

Offers can vary in the following ways:

- Different parameterized offer fields, including valid and expiry dates.
- Different offer codes (number of codes, length, format, custom code generator)
- Custom attributes (which are exposed for a specific type of offer; for example, credit card offers have initial APR% and go-to rates; mortgage offers have payment frequency and term).

As a best practice, keep parameterized values in offers to a minimum. Most offer attributes should not be parameterized. You should create parameters only for those attributes that will not change the "essence" of an offer, such as effective and expiration dates.

Carefully consider the design of your offers and offer templates, as this can significantly affect how you can analyze and report on campaign details.

Chapter 2. Offer settings

Use Offer settings to create custom attributes and custom templates.

To access Offer settings, select **Settings > Offer settings**. The **Offer settings** page appears. There are three options:

- Custom attribute definitions *(on page 7)*
- Offer template definitions *(on page 11)*
- Offer without template settings *(on page 18)*

User roles

Before you begin the admin activities, you should assign roles and permissions to users.

- Assigning OfferAdmin role to the user *(on page 4)*
- Assigning custom roles and permissions to the user *(on page 6)*
- Assigning OfferUser role to the offer user *(on page 5)*

Note: Any changes in configuration requires a restart of Unica Centralized Offer Management. For more information related to security configurations, see *Unica Campaign Administrator's Guide*.

Assigning OfferAdmin role to the user

To assign a role to the offer administrator, complete the following steps:

1. From the Marketing Platform home page, select **Settings > User roles and permissions**. The **User roles and permissions** page appears.
2. In the left panel, expand **Unica Offer > partition(n)**, where n is the number of the partition.

3. Select **OfferAdmin**.
   The **OfferAdmin** page appears.
4. In the **Users** section, select the admin user. For example, `asm_admin`.
   The **asm_admin (asm_admin)** user details page appears.
5. Select **Edit roles**.
   The **Edit roles** page appears.
6. From the **Available roles** list, select **OfferAdmin (Unica Offer)** and click the **>>** button to move the role to the **Selected roles** list.
7. Click **Save changes**.

Assigning OfferUser role to the offer user

To assign a role to the offer user, complete the following steps:

1. From the Marketing Platform home page, select **Settings > User roles and permissions**.
   The **User roles and permissions** page appears.
2. In the left panel, expand **Unica Offer > partition(n)**, where n is the number of the partition.
3. Select **OfferUser**.
   The **OfferUser** page appears.
4. In the **Users** section, select the admin user. For example, `demo`.
   The **demo (demo)** user details page appears.
5. Select **Edit roles**.
   The **Edit roles** page appears.
6. From the **Available roles** list, select **OfferUser (Unica Offer)** and click the **>>** button to move the role to the **Selected roles** list.

7. Click **Save changes**.

Assigning custom roles and permissions to the user

For Unica Centralized Offer Management, set user roles and permissions in Unica Campaign.

To set user roles and permissions in Unica Campaign, complete the following steps:

1. From the Marketing Platform home page, select **Settings > User roles and permissions**.
   The **User roles and permissions** page appears.
2. In the left panel, expand **Unica Campaign > partition(n)**, where n is the number of the partition.
3. Select **Global Policy**.
   The **Global Policy** page appears.
4. Select **Add roles and assign permissions**.
   The **(Global Policy)** page appears.
5. Click **Save and edit permissions**.
   The **(Permissions for Global Policy)** page appears.
6. Expand **Offer lists**, **Offer templates**, and **Offers** and select the following permissions for all the displayed operations in **Offer lists**, **Offer templates**, and **Offers**:
   - **Folder Owner**
   - **Owner**
   - **Admin**
   - **Execute**
   - **Design**
   - **Review**

   Note: We recommend that the administrator assigns all permissions for all operations listed in **Offer lists**, **Offer templates**, and **Offers**.

Custom attribute definitions

You can create offer attributes and use them on offer templates and offers.

After you create custom offer attributes, you can add it to any new offer template. Any offers that are created from that template will include the custom attribute.

The available attributes are:

- **Standard attributes** - You cannot create or delete standard attributes. You can only modify certain parameters of the standard attributes.
    - For the list of standard attributes, see List of standard attributes *(on page 21)*.
    - To view standard attributes, see Viewing standard attributes *(on page 8)*.
    - To modify standard attributes, see Editing standard attributes *(on page 9)*.
- **Custom attributes** - You can create and modify custom attributes, but after creation you cannot delete custom attributes.
    - To create custom attributes, see Creating custom attributes *(on page 7)*.
    - To view created custom attributes, see Viewing custom attributes *(on page 8)*.
    - To modify custom attributes, see Editing custom attributes *(on page 10)*.

Creating custom attributes

You can define custom attributes for use in offers.

For a detailed information on the fields mentioned in the procedure, see Fields in add attribute details page (on page 22).

To create custom attributes, complete the following steps:

1. From the Marketing Platform home page, select **Settings > OfferSettings**.
   The **Offer settings** page appears.

2. Select **Custom attributes definitions**.
   The **Attribute definitions** page appears.

3. Click **+ Add custom attribute**.

   The **Add attribute details** page appears.

4. Provide values for the Basic options, which include:
   - **Display name**
   - **Internal name**
   - **Description**

5. Select the **Form element type** and the corresponding details as applicable.

6. If required, select **Mandatory**.

7. Click **Save**.

   You can view the new custom attribute in the Attribute definitions page. For more information, see Viewing custom attributes *(on page 8)*.

Viewing standard attributes

To view the standard attributes, complete the following steps:

1. From the Marketing Platform home page, select **Settings > OfferSettings**.

   The **Offer settings** page appears.

2. Select **Custom attributes definitions**.

   The **Attribute definitions** page appears.

3. By default, you can view the Standard attributes.
   - Sort the Standard attributes based on **Display name** or **Internal name**.
   - Edit the Standard attributes. For more information, see Editing standard attributes *(on page 9)*.

Viewing custom attributes

To view custom attributes, complete the following steps:

1. From the Marketing Platform home page, select **Settings > OfferSettings**.

   The **Offer settings** page appears.

2. Select **Custom attributes definitions**.

   The **Attribute definitions** page appears.

3. By default, you can view the Standard attributes. To view the Custom attributes, select **Custom**. You can perform the following operations on the page:
   - Use the **Search** bar to search for custom attributes. You can search using **Display name**, **Internal name**, or **Description**.
   - Sort the Custom attributes based on **Display name** or **Internal name**.
   - Edit the Custom attributes. For more information, see Editing custom attributes *(on page 10)*.
   - Customize the number of rows for display. The options are **10 Rows**, **20 Rows**, **50 Rows**, and **100 Rows**.
   - Move to the next page, previous page, last page, or the first page using the navigation arrows.

Editing standard attributes

To edit standard attributes, complete the following steps:

1. From the **Offer settings** page, select **Custom attributes definitions**.

   The **Attribute definitions** page appears.

2. For the attribute you wish to edit, select **>**  , succeeding the attribute.

   The attribute details page appears.

3. Depending on the form element type, you can either edit the maximum length, decimal places, or sort order and maximum length of the form element type. For more information on form element type and their details, see Custom attribute definitions *(on page 7)*.

4. To save the changes, click **Save**. To revert without saving the changes, click **Revert**.

Editing custom attributes

To edit custom attributes, complete the following steps:

1. From the **Offer settings** page, select **Custom attributes definitions**.
   The **Attribute definitions** page appears.
2. Select **Custom**.
3. For the attribute you wish to edit, select ⋮ **>** ✎ , succeeding the attribute.
   The attribute details page appears.
4. In the Basic options, you can modify the following fields:

   Note: For details on the fields, see Creating custom attributes *(on page 7)*.

   - **Display name**
   - **Internal name**
   - **Description**
5. In the Formatting options, you can modify the following fields:

   Note: For details on the fields, see Creating custom attributes *(on page 7)*.

   - You cannot edit the selected form element type, but you can either edit the maximum length, decimal places, or sort order and maximum length of the form element type.
   - **Mandatory**
6. To save the changes, click **Save**. To revert without saving the changes, click **Revert**.

Offer template definitions

You can create offers using offer templates or without offer templates. For offer users to use existing custom templates, an administrator must create offer templates before users can create offers using them.

You can only add parameterized attributes to a template that has offers based on it.

Before you start working with offer templates, you should create any custom offer attributes you might need. For example, you could create a drop-down list consisting of several choices, which users will be able to select from when creating offers.

Creating custom templates

Administrators must create offer templates before users can create offers.

To create custom templates, complete the following steps:

1. In the **Offer template definitions** page, click **+ Add new template**.
   The **Metadata** section of the **Add offer template details** page appears.
2. In the **Metadata** section, complete the following steps:
   a. In the Basic options, provide values for the following fields:
      - **Template display name** - Mandatory. An appropriate name for the custom template.
      - **Select template icon** - Mandatory. Select an appropriate icon from the available list. The selected icon appears beside the template name in the listing page.
      - **Security policy** - Mandatory. Select from the list of policies.
      - **Description** - Optional. Provide a description about the template.
      - **Suggested usages** - Optional. Provide a brief description about the scenarios where you can use the templates.

b. In the Offer codes, either accept the defaults, or modify the data for the following fields:
   - **Offer codes**
   - **Offer code generator**
   - **Treatment code format**
   - **Treatment code generator**
   - To use the offer template with Interact, select **Allow offers created from this template to be used in real-time interactions**. This option will be displayed only if interact is installed or enabled from settings.

     Note:
     - You cannot use the space character in an offer code format.
     - If you leave the Treatment code generator field empty, the default treatment code generator is used.

c. Click **Next**.
   The **Offer attributes** section appears.

3. In the **Offer attributes** section, complete the following steps:

   a. The **Offer attributes** section is divided into four sections:
      - **Available attributes** - This contains the **Standard** attributes and the **Custom** attributes. For more information on the attributes, see Custom attribute definitions *(on page 7)*.
      - **Parameterized attributes**
      - **Static attributes**
      - **Hidden attributes**

   b. **Note:** For an offer to be available in a flowchart, it must have at least one standard attribute.

      To pick **Standard** attributes as a part of the template, drag-and-drop the required attributes from the list to the **Parameterized attributes**, **Static attributes**, or the

Hidden attributes. You can also search the **Standard** attributes using the search bar.

c. **Note:** For an offer to be available in a flowchart, it must have at least one custom attribute.

   To pick **Custom** attributes as a part of the template, select **Custom**, and drag-and-drop the required attributes from the list to the **Parameterized attributes**, **Static attributes**, or the **Hidden attributes**. You can also search the **Custom** attributes using the search bar.

d. If you have dropped an incorrect attribute in any of the sections, click **X**, beside the attribute, to remove the attribute.

e. Click **Next**.
   The **Default values** section appears.

4. In the **Default values** section, for attributes that you added to the offer template, supply a default value that will be used when users create offers using this template. When creating offers, users can change the default value of static and parameterized attributes but cannot change the value you entered for hidden static attributes in the offer template.

   a. Provide appropriate values for all the attributes, default and selected. by expanding the three sections:
      - **Parameterized attributes** - For parameterized attributes with values supplied in a drop-down list, you can also add list items here, as you create the offer template. You can remove any new list items you add here but cannot remove any list items that existed previously. Any additions to the list items made here are saved back to the offer custom attribute. Expand the section and provide the values for the attributes.
      - **Static attributes** - Expand the section and provide the values for the attributes. For more information on default static offer attributes, see Default offer attributes *(on page 25)*.

- **Hidden attributes** - Expand the section and provide the values for the attributes.

b. If you have selected **Allow offers created from this template to be used in real-time interactions**, the Interaction point ID and an Interaction point name is automatically added to the parameterized attributes.
You can enter any integer for the Interaction point ID default value, and any string for Interaction point name. The values are automatically populated with the correct data by the runtime environment; however, the design environment requires a default value.

5. Click **Save**.
The success message for custom template creation appears in the **Offer template definitions** page.

Adding attributes to templates in use

With Unica Centralized Offer Management, an administrator can add a new attribute in the parameterized section of the template, even if offers are created using the template. The attribute added automatically become available in all the offers associated with the template. The value of the attribute, in the offers, will be the one set by the administrator.

Offer creation users can change the value of the attribute at offer level. We recommend that you use this feature only when you need to add attributes to offers in bulk.

Example

If a user starts using Unica Interact and all Unica Campaign offers require IP ID and IP Name, instead of updating every offer with these additional attributes, the administrator can add these attributes at the template level, which ensures that the additional attributes are automatically available in all the offers.

Save offer as templates

An administrator can create an offer template using any independent offer (“Offer without template). For the Offer user, the administrator should assign template permissions to save offer as a template.

Viewing custom templates

To view custom templates, complete the following steps:

1. From the Marketing Platform home page, select **Settings > Offer settings**.
   The **Offer settings** page appears.
2. Select **Custom template definitions**.
   The **Offer template definitions** page appears.
3. You can perform the following operations on the page:
   - Sort the custom templates based on **Offer template name**.
   - Reorder the view of the templates as per your convenience. For more information, see Reordering the templates in the list *(on page 15)*.
   - Edit the custom templates. For more information, see Editing custom templates *(on page 16)*.
   - Retire an active custom template. For more information, see Retiring active templates *(on page 17)*.
   - Customize the number of rows for display. The options are **10 Rows**, **20 Rows**, **50 Rows**, and **100 Rows**.
   - Move to the next page, previous page, last page, or the first page using the navigation arrows.

Reordering the templates in the list

You can reorder the templates as per your convenience using the Reorder feature.

You can sort the templates in ascending alphabetical order or descending alphabetical order based on Offer template name. But if you do not want the alphabetical sort and wish to see a few templates of your choice in the first page, you can reorder the listing.

To reorder templates, complete the following steps:

1. In the **Offer template definitions** page, click **Reorder**.
   The **Reorder offer template** panel appears.
2. Drag the required template and reposition it as per your choice.
   For example, if you want `Template-Name-06` and `Template-Name-07` as the first two templates on the list, drag `Template-Name-06` and drop it at the topmost location. Similarly, drag `Template-Name-07` and drop it underneath `Template-Name-06`.
3. After completing the reorder, click **Done**.
   The **Offer template definitions** page appears, and you will see the reordered list.

Editing custom templates

If an offer template does not have offers based on it, you can change the basic options and default values of attributes in the template and add attributes in the parameterized section. If an offer template has offers based on it, you can only add attributes in the parameterized section.

To edit active existing templates, complete the following steps:

1. In the Offer template definitions page, select **>**  , succeeding the custom template.
2. In the **Metadata** section make the required changes. For more information, see [Creating custom templates *(on page 11)*].
3. In the **Offer attributes** section:

   a. If the offer template is currently used by an offer, you cannot change settings for offer attributes. If the template is not being used, you can modify the attributes in the offer template as needed.
   b. For any further modifications, see Creating custom templates *(on page 11)*.
4. In the **Default values** section:
   a. If required, provide a default value for attributes in the offer template.
   b. When creating offers, users can change the default value of static and parameterized attributes. However, users cannot change the value that you enter for hidden static attributes.
   c. For any further modifications, see Creating custom templates *(on page 11)*.
5. Click **Finish**.

Retiring active templates

To retire custom templates that are in Active status, complete the following steps:

1. In the **Offer template definitions** page, select **>** , succeeding the active custom template.
   The **Retire template** confirmation box appears.
2. To retire a custom template, click **Retire**.
   If you retire an active custom template, you cannot use it for creating offers.
   The success message and the **Offer template definitions** page appears.

Using drop-down lists in offer templates

A drop-down list, also known as a Select Box, is a list of values from which users can select a single item when they define an offer.

To make a drop-down list available in offer templates, complete the following steps:

1. Define a custom offer attribute of the type **Select box - String**. Specify the list of available values when you define the custom offer attribute. For more information, see Creating custom attributes *(on page 7)*.
2. Add the attribute to an offer template. For more information, see Creating custom templates *(on page 11)*.
3. To determine whether users can specify additional values when they configure a contact process, select **Settings > Configuration** and adjust the global property `Campaign | partitions | partition[n] | server | flowchartConfig | disallowAdditionalValForOfferParam`.
   Any offers that are based on the offer template will include the drop-down list. Users can select values from the drop-down list when they define the offer.

Defining a list of outbound communication channels

As delivered, the Channel attribute does not include any available values. To make use of the Channel attribute, you must modify it to provide the values from which users can select. To modify the attribute and define the available values, see Creating custom attributes (on page 7) or Editing custom attributes (on page 10).

Offer without template settings

In this release of Unica Centralized Offer Management, you can create offers without existing templates.

Use the **Offer without template settings** feature to create an offer without the hassle of having a custom template. You can use the Basic options and Offer codes to quickly create an offer.

For more information on creating offer without templates, see Creating offers without template settings (on page 19).

An administrator can enable this feature for OfferUsers so that it will be available for all the users of that partition, irrespective of the user's security policy. The administrator must have the permission to create and update offer template in the global policy. For more details on permissions, see Assigning custom roles and permissions to the user (on page 6).

To enable this feature, the administrator must access the **Offer without template settings** link in the **Offer settings** page and fill all the basic details. For more information on creating offer without templates, see Creating offers without template settings (on page 19).

Creating offers without template settings

To create offers without template settings, complete the following steps:

1. From the Marketing Platform home page, select **Settings > OfferSettings**.
   The **Offer settings** page appears.
2. Select **Offer without template settings**.
   The **Offer without template settings** page appears.
3. In the Basic options, provide values for the following fields:
   - **Select template icons** - Select the required template icon.
   - **Description** - Provide a description of the offer.
   - **Suggested usages** - Provide a description of the various usages where the offer can be used.
4. In the Offer codes, provide values for the following fields:
   - **Offer codes** - Enter a desired alphanumeric offer code format. The offer code format should be five blocks where each block contains an alphanumeric string, less than 32 characters in each block. For example, `000001-MYCOMP-HDYBNZ-SEG001-PRT001`.
   - **Offer code generator** - Enter the name of the offer code generator which will generate the offer codes based on the format.
   - **Treatment code format** -
   - **Treatment code generator** -

5. To save the offer without template, click **Save**.

Chapter 3. Appendix

List of standard attributes

The following table lists the Standard attributes available in Centralized Offer Management:

Table 1. Standard Offer Attributes

Attribute Display Name	Attribute Internal Name	Form Element Type
Average Response Revenue	AverageResponseRevenue	Text Field - Currency
Channel	Channel	Select Box - String
Channel Type	ChannelType	Select Box - String
Cost Per Offer	CostPerOffer	Text Field - Currency
Creative URL	CreativeURL	Text Field - String
Effective date and expiration duration	EffectiveExpirationDates	Text Field - Date and Text Field - Date, or Text Field - Numeric
Fulfillment Cost	FulfillmentCost	Text Field - Currency
Interaction Point ID	UACInteractionPointID	Text Field - Numeric. Applicable only if Interact is installed or configured.
Interaction Point	UACInteractionPointName	Text Field - String. Applicable only if Interact is installed or configured.
Offer Fixed Cost	OfferFixedCost	Text Field - Currency

Fields in add attribute details page

The description of all the fields and their details, seen in the Add attribute details page, are as follows:

Table 2. Fields in Add Attribute Details Page

Field Name	Description
Display name	Specify the label to identify the attribute for users. For example, "Interest Rate". Double quotes in attribute display names are not supported.
Internal name	Specify a name to identify this attribute when you write a query or custom macro. Use the same name as the Attribute display name, but without any spaces (for example, "InterestRate"). The internal name must be globally unique, must start with an alphabetic character, cannot include spaces, and are not case-sensitive.
Description	A description of the attribute.
Form element type	Specify the type of data to be stored in the attribute field for offers. **Important:** After you add the custom attribute, you cannot change its data type.
Form element type Text field - String	Specify a maximum string length to indicate the maximum number of bytes to store for any value of this attribute. For example, if you enter 32, single-byte languages such as English store 32 characters but double-byte languages store only 16 characters.

<table>
<tr><th>Field Name</th><th>Description</th></tr>
<tr><td></td><td>Important: Decreasing the length of an existing attribute truncates existing values, which, if the field is used for matching purposes, can adversely affect response tracking.</td></tr>
<tr><td>Form element type

Text field - Numeric</td><td>Specify the number of decimal places to display to the right of the decimal point.

Note: If you decrease the value for an existing attribute, the display is truncated in the user interface. However, the original value is retained in the database.</td></tr>
<tr><td>Form element type

Text field - Date</td><td></td></tr>
<tr><td>Form element type

Text field - Currency</td><td>Specify the number of decimal places.

Important: The currency value reflects the number of decimal places that are customarily used in the local currency. If you specify a number for decimal places that is less than the number commonly used, the currency value is truncated.</td></tr>
<tr><td>Form element type

Select box - String</td><td>Specify a Maximum string length
Optionally, check Allow addition of list items from within edit forms to allow any user to add new unique values to the list of available values when creating or editing an offer template, or an offer that includes this attribute. For example, if a Select Box on an offer template contains the values Small, Medium, Large, a user could add the value Extra Large when creating an offer or editing the offer template.

Important: After the offer template, or offer is saved, the user cannot remove the new list item. The value</td></tr>
</table>

Field Name	Description
	is saved in the custom attribute definition and is then available to all users. Only administrators can remove items from lists, by modifying the custom attribute. • Populate the Source list of available values to specify which items are available in the Select Box. Enter values in the New or selected item field and click Accept. To delete a value, select it in the Source list of available values and click Remove. • Optionally, specify a Default value for the Select Box. The default value is used on the offer, unless the user specifies a different value when creating or editing the offer. • Specify the Sort order to determine how values appear in the list.
Form element type Text field - Integer	You can use the Integer attribute type to fill numeric data without decimal places.
Form element type Check box - Boolean	You can use the Boolean attribute type to select or deselect a checkbox (for example true or false) for the attribute. **Note:** Currently the systems leveraging Centralized Offer Management treats the Boolean attribute as numeric with possible values of 0 or 1. Here, 0 means FALSE and 1 means TRUE. So, if you are parameterizing the Boolean attribute, or exporting the attribute, it will be represented as 0 or 1.
Form element type Picker - URL	You can define the attribute of type URL. When integrated with Asset Picker, you can provide a URL for searching content from target content management system. For more information, refer Unica Asset Picker Administrator's Guide.

<table>
<tr><th>Field Name</th><th>Description</th></tr>
<tr><td>Mandatory</td><td>If you want to require a value for this attribute, select Mandatory.
This setting has the following result:
For offers, administrators are required to specify a value when the attribute is added to an offer template. The specified value is used for any offers that are based on that template, unless the user specifies a different value when creating or editing the offer.
If you change this option after an attribute is in use:
If you change from mandatory to non-mandatory, a value is no longer required when the attribute is used.
If you change from non-mandatory to mandatory, a value is required whenever this attribute is used in the future. This change has no effect on existing objects unless you edit them. For example, if you open a campaign, target cell spreadsheet, or offer in Edit mode, you are required to specify a value before saving.</td></tr>
</table>

Default offer attributes

When you create an offer template, you can add template attributes as needed.

By default, the following static attributes are included in all offer templates:

- **Name**
- **Description**
- **Offer code**
- **Relevant product(s)**

You cannot remove these static attributes from a template.

Template icons

Select a template icon as part of the **Basic options** when you create or modify an offer template. The template icon provides a visual cue to users when they create new offers based on this template.

To see the available icons, choose one from the **Select template icons** list when creating or modifying an offer template.