Unica Centralized Offer Management V12.0 User Guide

Contents

Chapter 1. Offer management

Offers are specific marketing communications that you send to groups of people, using one or more channels. Each offer can based on an offer template that an administrator defines. Alternatively, Unica Centralized Offer Manager also provides the capability for users to create offers without a template, if an admin enables it at the partition level.

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 varies based on the recipient's credit rating and region.

Offers are reusable:

- at different points in time.
- as different "versions" by varying the offer's parameterized fields.

The general workflow is:

1. (Optional) An administrator defines custom attributes.
2. An administrator creates offer templates (required) and adds custom attributes to them (optional).
3. A user creates offers based on the templates.

Once an offer is used, it cannot be deleted. However, it can be retired. Retired offers cannot be assigned, and any assigned offers that have been retired will no longer be sent. Retired offers are grayed out in the offer hierarchy. They are still available for reporting and response tracking.

Offer attributes

Offer attributes are the information that defines an offer. Offer name, Description, and Channel are examples of offer attributes.

Some attributes are specific to a type of offer. For example, Interest Rate might be an attribute of a credit card offer, but not of a free shipping offer.

The types of offer attributes are as follows:

Table 1.

Offer attributes	Description
Standard	Default offer attributes that are supplied with Centralized Offer Management, which can optionally be included in an offer. Examples are Channel, Effective date, and Expiration date.
Custom	Attributes that are created for your organization, such as Department, Sponsor, Interest Rate, and SKU.

When administrators define offer attributes in an offer template, each attribute is defined as either static, hidden, or parameterized. The same offer attribute (for example, Channel), could be static in one offer template, but parameterized in another.

Table 2. Types of Attributes

Attribute type	Description
Static attributes	Offer attributes whose values do not change when you create a different version of the offer. Examples are offer code, offer name, and description.
Hidden attributes	Static attributes are included on an offer template but hidden from the person who creates the offer. Hidden attributes can be searched for, tracked, and reported on. For example, if a template includes Offer Cost (the cost to your organization of administering the offer), you can search for all offers that cost less than $1.00 to administer. The

Attribute type	Description
	information can be used in reports for performance ROI analysis.
Parameterized attributes	Offer attributes whose values can be supplied when the offer is assigned. For example, type a value, select an option from a predefined drop-down list, or select a database field. When the offer template is defined, your administrator can set up any standard or custom offer attribute as a parameterized attribute.

Parameterized attributes in offer templates have default values that you can override when the offer is created and when it is assigned. For example, the introductory interest rate for a credit card offer could be parameterized in its offer template with values of 5%, 8%, and 12%. When you use the template to create an offer, you can select one of those values as the default interest rate. When the offer is subsequently used in a flowchart and assigned to a cell, the flowchart designer can change the interest rate to a different value.

Offer versions

An offer version is created each time you vary the parameterized attributes of an offer to create a unique combination.

For example, you can vary the following attributes in a credit card offer:

- Artwork (lighthouse, kittens, or racing cars)
- Introductory rates (5.99%, 8.99%, or 12.99%)
- Offer valid dates (January, June, or September)

Thus, a credit card with the lighthouse image, 5.99% introductory rate, and offer valid from September 1-31 is a different version of the offer than a credit card with a different image, rate, or valid date.

Note: To uniquely identify specific instances of offer usage, use treatment codes.

Offer templates

When you create an offer, you base it on an offer template. Offer templates are created in advance by an administrator.

Every offer template includes several required fields, such as Offer name and Security policy. Additionally, templates may include custom attributes that were defined separately. For example, a template for creating "Reward Card" offers might include a "Discount" drop-down list (a custom attribute) that contains the values 10%, 15%, and 20%.

When you create an offer based on that template, you fill out any fields that are defined in the template. For example, you supply an Offer name, select a Security policy, and choose a default value from the "Discount" drop-down list. If you can add values to the list, you see an **Add** button next to the attribute when you create the offer. For example, if you add the value 25%, the list will then contain four values (10%, 15%, 20%, 25%).

When you save the offer, it becomes available for use in campaign flowcharts. The flowchart designer can then assign offers by configuring a contact process, such as Mail list, Call list, or Optimize.

The behavior of drop-down lists in contact processes is controlled by the generic configuration parameter **disallowAdditionalValForOfferParam**. This parameter determines whether flowchart designers are restricted to selecting a value from the list when they configure a contact process. If the parameter is true, designers can only select values from the drop-down list. If the parameter is false, designers can select values outside of the list, for example from a database table.

Chapter 2. Offers and offer lists

Offers represent the marketing messages that you want to communicate to customers or prospects.

Before creating an offer, an administrator can create an offer template and you must have permission to use that template. To create offers in a folder, you must have appropriate permissions in the security policy that governs that folder.

Alternatively, you can also use the **Offer without template** feature, only if the administrator enables this feature for you. After the administrator enables this feature, it will be available for all the users of that partition, irrespective of the user's security policy.

With this feature you can create an offer without having fixed set of attributes. When you create an offer, you will see the option **Offer without template**. Pick attributes of your choice from the list of existing attributes.

Whether you create a new offer, or a new version of an existing offer depends on how the administrator has defined the offer templates. You must create a new offer in the following situations:

- Whenever non-parameterized offer fields change.
- When you need a new offer code for tracking purposes.

Creating offers

To create offers, complete the following steps:

1. From the Platform home page, select **Offer > Offers**.
   The **All offers** page appears.
2. Select a folder or a sub-folder where you want to create the offer. If you want to create the offer in a new folder, create a new folder. For more information on creating folders, see Creating folders *(on page 23)*.

3. Click **+ Add offer**.

   The **New offer** page appears.

4. In the **New offer** page, complete the following steps:

   a. By default, the **Select template** section appears. The **Select template** section contains:

      i. An **All templates** panel that lists all the available templates to create offers. The list of templates will include templates that will contain custom templates and offers created without templates.

      ii. A **Template details** panel that displays the template details of the selected template.

   b. Select the required custom template or offers created by the administrator without templates. If required, use the **Search** feature to locate the required template using the template name.

   c. Click **Next**.

      The **Default values** section appears.

   d. In the **Default values** section, provide values for the all the attributes of the template. The attributes vary depending on the selected template.

   e. Relevant products can be associated to an offer using the query. To build a compound query, edit the query, test the query, or delete the query, use the **Relevant products** panel. The **Relevant products** panel is an expandable and collapsible panel.

      To create a compound query, expand the panel and complete the following steps:

      i. Expand the **Relevant products** panel.

      ii. Select **Import product ID**. The **Select products** dialog appears. By default, the **Import product ID** section is displayed.

      iii. Enter the required product ID and click **Import**.

      iv.

      v. Click **Save & test** to check if the query works or click **Save** to save the query.

To edit a compound query, complete the following steps:

i. Expand the **Relevant products** panel.
ii. Select **Edit query**. The **Select products** dialog appears. By default, the **Edit query** section is displayed.
iii. Create a condition by providing the required product ID and the required user defined field.
iv. Click **Add**.
v. Click **Save & test** to check if the query works or click **Save** to save the query.

To test the compound query, complete the following steps:

i. Expand the **Relevant products** panel.
ii. Select **Test query**. The **Test query** dialog appears.
iii. If the query is valid, you will see the results. If the query is invalid, you will not see any results.
iv. If you do not see any results, click **Edit query** to modify the query. If you see the required results, click **Finish**.

To delete a compound query, complete the following steps:

i. Expand the **Relevant products** panel.
ii. Select **Delete query**. The **Delete query** dialog appears.

f. Select **+ Add suppression rules** determine whether to stop presenting this offer in real-time interactions based on criteria you specify. This feature is displayed only if you are defining an offer using a template that has **Allow offers created from this template to be used in real-time interactions** selected. For example, you might suppress this offer from being presented to visitors who have explicitly rejected it, or you might want to suppress the offer after it has been presented to a visitor a certain number of times.

Note: You will also see the **+ Add suppression rules** function if you add **Interaction Point ID** and **Interaction point name** when you add attributes to existing offers. To add **Interaction Point ID** and **Interaction point name** attributes, Interact should be installed and configured.

Saving newly created offers as a Template

When creating a new offer using Offer without template, you can save the offer as a template for later use.

To save a newly created offer as a template, complete the following steps:

1. From the Platform home page, select **Offer > Offers**.
   The **All offers** page appears.
2. Select a folder or a sub-folder where you want to create the offer. If you want to create the offer in a new folder, create a new folder. For more information on creating folders, see Creating folders *(on page 23)*.
3. Click **+ Add offer**.
   The **New offer** page appears.
4. In the **New offer** page, by default, the **Select template** section appears. The **Select template** section contains:
   a. An **All templates** panel that lists all the available templates to create offers. The list of templates includes custom templates and offers without templates.
   b. A **Template details** panel that displays the template details of the selected template.
5. Select offers created by the administrator without templates. If required, use the **Search** feature to locate the required template using the template name.
6. Click **Next**.
   The **Add Attributes** panel opens.
7. You can either:
   - Drag-and-drop the required **Standard** attributes to **Parameterized attributes**, **Static attributes**, or **Hidden attributes**.
   - Select **Custom** and drag-and-drop the required Custom attributes to **Parameterized attributes**, **Static attributes**, or **Hidden attributes**.

8. Click **Next**.
   The **Attribute values** page appears.
9. Provide values for the displayed fields and click **Add & save**.
10. Click **Save**.
    The success message appears.
11. Click **Actions > Save as template**.
    The **Metadata** section of the Offer as a template page appears.
12. Ensure that you have provided the mandatory values and click **Next**.
    The **Default values** page appears.
13. If required, modify the values or click **Save**.
    The offer is saved as a template and will be available for use the next time you create an offer.

Creating offer lists

Offer lists are configurable groups of offers that you can use to manage offers. The same offer can exist in more than one offer list. You can add offers to offer lists and assign offer lists to cells. You can also edit, move, delete, or retire offer lists.

After an offer list has been used, it cannot be deleted but it can be retired. Retired offer lists can no longer be assigned. Assigned offer lists that have been retired will no longer be given out.

You can create two types of offer lists:

- Static offer lists
- Smart offer lists

Object-level security applies to offer lists, based on the folders where your offer lists and the offers included in your lists reside.

1. Create a static offer list. For more information, see Creating static offer lists *(on page 10)*.
2. Create a smart offer list. For more information, see Creating smart offer lists *(on page 11)*.

Creating static offer lists

Static offer lists are pre-defined lists of offers whose contents do not change unless you explicitly edit the list.

In case of static offer lists, you can only add offers to which you have access. However, anyone with permission to access an offer list is automatically granted permissions to access the offers included in that list. Therefore, anyone who can access your list can also use that offer list and all the offers within it, even if they would not normally have access to those offers based on their security permissions. When creating static offer lists, select individual offers to include in the list. A limitation of static offer lists is that default values are used for parameterized offer attributes.

To create static offer lists, complete the following steps:

1. From the Platform home page, select **Offer > Offers**.
   The **All offers** page appears.
2. Select **Offer lists > + Add offer list**.
   The **Basic options** section of the **New offer list** page appears.
3. Provide values for the following fields:
   - **Name**
   - **Security policy**
   - **Description**
4. Click **Next**.
   The **Offers association** section of the **New offer list** page appears.

5. Select the required folder from the **Folders list** panel and select the required offers. If required, use the **Offer global search** feature to find the required offer.
   The selected offers appear in the **Selected offers** panel.
6. Click **Next**.
   The **View Offer list** section of the **New offer list** page appears displaying the selected offers and their details.
7. Click **Save**.
   The message indicating successful creation of offer list appears.

Creating smart offer lists

A smart offer list is a dynamic list of offers that can resolve to different results each time the list is used. A smart offer list is specified by a query which can be based on offer attributes, offer locations (folders or subfolders), offer owner, and so on.

Users who can access a folder containing a smart offer list can use that smart offer list. They will get the same result as anyone else running that offer list, even if they would not normally have access to offers (for example in another division's folders).

An example for using smart offer lists involves setting up the smart offer list to automatically return the offers that you want to give out. If you want to give your "high-value customer" the "best credit card offer" available, you can set up a smart offer list that includes all credit card offers, sorted by the lowest interest rate and with maximum size set to `1`. The lowest interest rate credit card offers available, at the time the flowchart contact process is run, is automatically found and given to the high-value cell.

Note: Newly created offers can become part of smart offer lists with no action on your part if they meet the smart offer list query criteria.

To create smart offer lists, complete the following steps:

1. From the Platform home page, select **Offer > Offers**.
   The **All offers** page appears.

2. Select **Offer lists > + Add offer list**.

   The **Basic options** section of the **New offer list** page appears.

3. Provide values for the following fields:
   - **Name**
   - **Security policy**
   - **Description**

4. Select **Smart offer list**.

5. Click **Next**.

   The **Offers association** section of the **New offer list** page appears.

6. To set the criteria for selection of offers, click **Update criteria**.

   A side panel appears containing the tabs **Conditions**, **Restrictions**, and **List size limit**. By default, the **Conditions** tab is active.

7. Click **Add condition**.

   The following fields appear:
   - **Attribute** - Mandatory. Select the required attribute. You can also search the required attribute using the **Search** bar.
   - **Condition** - Mandatory. Select the required condition based on the attribute selected.
   - **Value** - Mandatory. Provide a value to meet the criteria.

8. To add more conditions, execute step 7 *(on page 12)*. Add as many conditions as required and combine them using the `AND` or `OR`. To remove the condition, select the **X** succeeding the condition.

9. You can restrict the search for offers by specifying the folder in the **Restrictions** tab. By default, the restriction criteria is set to `All Offers`. To limit the search to a specific folder, deselect the default selection, and select the required folder, or folders, in the **Available folders** panel.

10. The selected folder, or folders, appear in the **Restricted folders** panel. By default, the **Restrict access to all sub-folders of the selected folders** option is selected. If you

do not want to include the offers in the sub-folders of the selected folder, or folders, deselect the option.

11. To specify the size limit of an offer list, select the **List size limit** tab. Provide values for the following fields:
    - **Size** - This is part of the **List size limit** group. Provide a positive integer value which limits the number of offers in an offer list. For example, `10`.
    - **Attribute** - This is part of the **Order by** group. Select the attribute on which the offers will be ordered. You can also search the required attribute using the **Search** bar.
    - **Order** - This is part of the **Order by** group. Select how the offers will be ordered for the selected attribute. For example, `Ascending` or `Descending`.
12. Click **Save**.
    The message indicating successful creation of offer list appears.

Viewing offers and offer lists

After creating offers or offer lists, you can open the offers, or offer lists, to view the summary and analysis.

To view offers or offer lists, complete the following steps:

1. From the Platform home page, select **Offer > Offers**.
   The **All offers** page appears.
2. Select a folder or a sub-folder containing the offer or the offer list.
3. To view an offer, complete the following steps:

    a. Click the required offer from the list. If you cannot find the required offer, use the **Offer global search** feature to search for the offer.
    The offer page appears. You can view the offer details in the **Summary** tab.

    b. To view the reports related to the offer, click the **Analysis** tab.

c. To see the available reports, select one of the following choices from the **Select a link** dropdown box.
   - **"What if" offer financial summary**

     Note: The **"What if" offer financial summary** report is not supported for MariaDB.
   - **Offer performance summary by Campaign**
   - **Offer performance by day**

4. To view an offer list, complete the following steps:

   a. On the **All offers** page, select **Offer lists**.

   b. Click the required offer list from the list. If you cannot find the required offer list, use the **Offer list global search** feature to search for the offer list.

   Note: If required, you can use predefined filters that shows only Smart offer lists and Static offer lists from the selected folder. To view only Smart offer lists, select **Smart**. To view only Static offer lists, select **Static**.

   The offer list page appears.

Editing offers

You can edit an offer at any time, even if it has been used in a contact process, depending on your roles and permissions.

After an offer is used in production, you can edit only the offer name, description, and default values for parameterized offer attributes. This restriction ensures that Centralized Offer Management can track the exact offer details for offers that have already been made.

To edit offers, complete the following steps:

1. From the Platform home page, select **Offer > Offers**.
   The **All offers** page appears.

2. Select a folder or a sub-folder containing the offer.
3. Hover the mouse pointer over a required offer and select **>** . If you cannot find the required offer, use the **Offer global search** feature to search for the offer.
4. Make the necessary changes. For more information, see Creating offers *(on page 5)*.

   Note: You can add new parameterized attributes even when editing offers. For more information, see Adding attributes to existing offers *(on page 15)*.

5. To save the modifications or changes, click **Save**.

Adding attributes to existing offers

You can add an attribute in the parameterized section of an existing offer. Adding an attribute to any existing offer breaks its association with the template and turns the offer from custom template-based offer to offer without a template.

After adding an attribute, when there is no longer an association between the offer and the offer template, the offer will not appear in the search result for the search queries based on template name.

If such modified offers are assigned to some flowchart process box or interactive strategy, adding attributes to the offer will not automatically reflect in the existing campaigns or deployed interactive strategies. This behavior is to avoid any accidental changes in the live batch campaign or an interactive campaign. However, you can decide whether to have the additional attributes by re-assigning the same offer to the flowchart or by redeploying the interactive channel.

To add attributes to existing offers, complete the following steps:

1. From the Platform home page, select **Offer > Offers**.
   The **All offers** page appears.
2. Select a folder or a sub-folder containing the offer.

3. Hover the mouse pointer over a required offer and select > . If you cannot find the required offer, use the **Offer global search** feature to search for the offer.
   The offer details page appears.
4. Click **+ Add attributes**.
   The **Add attributes** panel opens.
5. If you want to add Standard attributes, drag-and-drop the attributes from the left panel to the parameterized attributes section. If you want to add Custom attributes, click **Custom** and drag-and-drop the attributes from the left panel to the parameterized attributes section.
6. Click **Next**.
   The **Add values** page appears.
7. Provide the required values and click **Add & save**.
8. Click **Save**.
   The success message appears. Perform steps 9 *(on page 16)* through 11 *(on page 16)* to save the edited offer as a template.
9. Click **Actions > Save as template**.
   The **Metadata** section of the Offer as a template page appears.
10. Ensure that you have provided the mandatory values and click **Next**.
    The **Default values** page appears.
11. If required, modify the values or click **Save**.
    The offer is saved as a template and will be available for use the next time you create an offer.

Editing offer lists

To edit an offer list, complete the following steps:

1. From the Platform home page, select **Offer > Offers**.
   The **All offers** page appears.
2. In the **Folders list** panel, select a folder or a sub-folder containing the offer list.
3. Select **Offer lists**.
4. Hover the mouse pointer over a required offer list and select **>** . If you cannot find the required offer list, use the **Offer list global search** feature to search for the offer list.

   Note: If required, you can use predefined filters that shows only Smart offer lists and Static offer lists from the selected folder. To view only Smart offer lists, select **Smart**. To view only Static offer lists, select **Static**.
5. Make the necessary changes. For more information, see Creating offer lists *(on page 9)*.
6. To save the modifications or changes, click **Save**.

Duplicating offers

To create duplicates of offers, complete the following steps:

1. Select **Offer > Offers**.
   The **All offers** page appears.
2. Select the folder or the sub-folder containing the offer.
3. Select the required offer or select multiple offers. If you cannot find the offers, use **Offer global search** to search the required offers.
4. Select **Actions > Duplicate**
   The **Duplicate offers** dialog appears.

5. Click **Duplicate**.

   The duplicate offers will be created, and they will exist in the selected folder.

Moving offers or offer lists

To move offers or offer lists, complete the following steps:

1. Select **Offer > Offers**.

   The **All offers** page appears.

2. Select the folder or sub-folder containing the offers or offer lists.

3. To move a single offer, or offer list, perform either of the following steps:
   - ◦ Find the required offer. If you cannot find the required offer, use the **Offer global search** feature to search for the offer. When you find the required offer, hover the mouse pointer over the offer. Select  **>**  . A side panel opens.
     ◦ Select the required folder or sub-folder and click **Move here**. A confirmation box appears.
     ◦ Click **Move**.
   - ◦ In case of offer lists, select **Offer lists**.
     ◦ If the required offer list is a Smart offer list, select **Smart**. If the required offer list is a Static offer list, select **Static**.
     ◦ Find the required offer list. If you cannot find the required offer list, use the **Offer list global search** feature to search for the offer list. When you find the required offer list, hover the mouse pointer over the offer list. Select  **>**  . A side panel opens.
     ◦ Select the required folder or sub-folder and click **Move here**. A confirmation box appears.
     ◦ Click **Move**.

4. To move multiple offers, or offer lists, perform either of the following steps:

-
    - In case of offers, select the required offers. If required, use the **Offer global search** feature to search for offers.
    - Select **Actions > Move**. A side panel opens.
    - Select the required folder or sub-folder and click **Move here**. A confirmation box appears.
    - Click **Move**.
-
    - In case of offer lists, select **Offer lists**.
    - If the offer list is a smart offer list, select **Smart**. If the offer list is a static offer list, select **Static**.
    - Select the required offer lists. If required, use the **Offer list global search** feature to search for offer lists.
    - Select **Actions > Move**. A side panel opens.
    - Select the required folder or sub-folder and click **Move here**. A confirmation box appears.
    - Click **Move**.

Retiring offers or offer lists

To retire offers or offer lists, complete the following steps:

This procedure will retire the offers or offer lists from the Unica Centralized Offer Management system. If you delete used offers, or offer lists, from Campaign and Interact, they will be retired in Unica Centralized Offer Management.

1. Select **Offer > Offers**.
   The **All offers** page appears.
2. Select the folder or sub-folder containing the offers or offer lists.
3. To retire a single offer or offer list, perform either of the following steps:
    -
        - In case of offers, find the required offer. If you cannot find the required offer, use the **Offer global search** feature to search for the offer. When you find the

required offer, hover the mouse pointer over the offer and select  **>**  . A confirmation box appears.
- ◦ Click **Retire**.
- ◦ In case of offer lists, select **Offer lists**.
  - ◦ If the offer list is a smart offer list, select **Smart**. If the offer list is a static offer list, select **Static**.
  - ◦ Find the required offer list. If you cannot find the required offer list, use the **Offer list global search** feature to search for the offer list. When you find the required offer list, hover the mouse pointer over the offer list and select  **>**  . A confirmation box appears.
  - ◦ Click **Retire**.

4. To retire multiple offers or offer lists, perform either of the following steps:
   - ◦ In case of offers, select the required offers. If you cannot find the required offer, use the **Offer global search** feature to search for the offer.
     - ◦ Select **Actions > Retire**. A confirmation box appears.
     - ◦ Click **Retire**.
   - ◦ In case of offer lists, select **Offer lists**.
     - ◦ If the offer list is a smart offer list, select **Smart**. If the offer list is a static offer list, select **Static**.
     - ◦ Select the required offer lists. If you cannot find the required offer list, use the **Offer list global search** feature to search for the offer list.
     - ◦ Select **Actions > Move**. A confirmation box appears.
     - ◦ Click **Retire**.

Deleting offers or offer lists

This procedure will delete the offers or offer lists from the Unica Centralized Offer Management system. If you delete used offers from Campaign, they will be retired in Unica Centralized Offer Management.

To delete offers or offer lists, complete the following steps:

1. Select **Offer > Offers**.
   The **All offers** page appears.
2. Select the folder or sub-folder containing the offers or offer lists.
3. To delete a single offer or offer list, perform either of the following steps:
   - ◦ In case of offers, find the required offer. If you cannot find the required offer, use the **Offer global search** to search for the offer. When you find the required offer, hover the mouse pointer over the offer and select  **>**  . A confirmation box appears.
     ◦ Click **Delete**.
   - ◦ In case of offer lists, select **Offer lists**.
     ◦ If the offer list is a smart offer list, select **Smart**. If the offer list is a static offer list, select **Static**.
     ◦ Find the required offer list. If you cannot find the required offer list, use the **Offer list global search** to search for the offer list. When you find the required offer list, hover the mouse pointer over the offer list and select  **>**  . A confirmation box appears.
     ◦ Click **Delete**.
4. To delete multiple offers or offer lists, perform either of the following steps:
   - ◦ In case of offers, select the required offers. If you cannot find the required offer, use the **Offer global search** to search for the offer.
     ◦ Select **Actions > Delete**. A confirmation box appears.
     ◦ Click **Delete**.
   - ◦ In case of offer lists, select **Offer lists**.
     ◦ If the offer list is a smart offer list, select **Smart**. If the offer list is a static offer list, select **Static**.
     ◦ Select the required offer lists. If you cannot find the required offer list, use the **Offer list global search** feature to search for the offer list.

- Select **Actions > Delete**. A confirmation box appears.
- Click **Delete**.

Chapter 3. Folders

Folders contain the offers or offer lists that you create.

You can save offers and offer lists within a folder or sub-folders. The folders panel exists in the same page as the **All offers** page. You can perform the following operations on the folders panel:

- Creating folders *(on page 23)*.
- Updating folders *(on page 24)*.
- Moving folders to another location *(on page 24)*.
- Refreshing the folders list *(on page 25)*.
- Deleting folders *(on page 26)*.

Creating folders

You can create folders to save offers and offer lists. You can also create sub-folders within a folder.

To create folders, complete the following steps:

1. Select **Offer > Offers**.
   The **All offers** page appears.
2. Click **+ Add folder**.
   The **Add folder** dialog appears.
3. Provide values for the following fields:
   - **Display name** - Mandatory.
   - **Security policy** - Mandatory.
   - **Description** - Optional.
4. Click **Save**.
   By default, the folder resides in the `All offers` location.

The success message appears in the **All offers** page.

5. To create a sub-folder, select the newly created folder and perform steps 2 (on page 23) to 4 (on page 23) again. If you cannot see your newly created folder, refresh the **Folders list**. For more information on refreshing the Folders list, see Refreshing the folders list (on page 25).

   Note: If you create a sub-folder, it inherits the policy of the parent folder.

Updating folders

You can update only the display name and the description of the folder.

To update a folder, complete the following steps:

1. Select **Offer > Offers**.
   The **All offers** page appears.
2. In the **Folders list** panel, select the required folder and select **Actions > Update**.
   The **Edit folder** dialog appears.
3. You can only modify the following values:
   - **Display name**
   - **Description**
4. Click **Save**.
   The success message appears in the **All offers** page.

Moving folders to another location

You can move the folders from the `All offers` location to another location.

To move folders from one location to another, complete the following steps:

1. Select **Offer > Offers**.
   The **All offers** page appears.
2. **Note:** To select multiple folders, press the CTRL key and use the mouse to select multiple folders.

   In the **Folders list** panel, select the required folders, or select the required sub-folders within a folder, and select **Actions > Move**.
   The **Folders** panel appears.
3. To move to the `All offers` location, click **Move here**. To move to a different folder, select the folder and click **Move here**. To move to a sub-folder, select the folder and select the sub-folder and click **Move here**.
   The success message appears in the **All offers** page.

   Note:
   - If you move folders into another folder, the moved folders inherit the policy of the parent folder.
   - When you move folders, the offers and offer lists within the folder are also moved to the new location.

Refreshing the folders list

Sometimes the newly created folders do not appear in the **Folders list** immediately. Refresh the list to view the folders.

To refresh the **Folders list**, complete the following steps:

1. Select **Offer > Offers**.
   The **All offers** page appears.
2. In the **Folders list** panel, select **Actions > Refresh**.
   The **Folders list** refreshes to show the latest updates.

Deleting folders

You can remove unwanted folders and sub-folders.

To remove unwanted folders or sub-folders, complete the following steps:

1. Select **Offer > Offers**.
   The **All offers** page appears.
2. **Note:** To select multiple folders, or sub-folders, press the CTRL key and use the mouse to select multiple folders.

   In the **Folders list** panel, select the required folder, or folders, and select **Actions > Delete**. To delete a sub-folder, or multiple sub-folders, within a folder, click the required folder and select the sub-folders.
   The **Delete folders** dialog appears.
3. Click **Delete**.
   The successful deletion message appears in the **All offers** page.

   Note:
   - When you delete folders, you also delete the offers and offer lists within the folder.
   - If the offers and offer lists, within a folder, are used in Campaign or Flowcharts, then such offers or offer lists are not deleted. They are marked as Retired.
   - If the offers and offer lists, within a folder, are not used in Campaign or Flowcharts, then such offers or offer lists are deleted.