

## Unica Centralized Offer Management V12.1.6 Administrator's Guide



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# Chapter 1. Offer administration concepts

Offer administration concepts include:

- [An introduction to offers on page 1](#)
- [An introduction to offer templates on page 1](#)
- [Offer templates and security on page 2](#)
- [Planning offer templates and offers on page 2](#)

## An introduction to offers

An offer is a specific marketing communication that you send to a group of people, using one or more channels. From V12.1.4 onwards, offers will be available as **Offer Central**, a sub menu under **Marketing Central**.

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.

## Autosync

Autosync feature synchronizes content created in a Content Management System (CMS) to an offer in Centralized Offer Management.

This feature allows Unica administrators to link the CMS Content type with offer template & whenever Content is created, updated or expired in CMS, it gets reflected in Unica centralized offer management.

Autosync feature is supported for all CMSes. The prerequisite for such a synchronization is that the CMS should send the create, update and expire events to the Content Integration framework and CMS specific plugin needs to be developed in Content integration framework to process the event.

For more information on the plugin development, see *Unica Content Integration Developer Guide*. Plugin for the HCL DX is available out-of-the-box.

Once the prerequisites are met, offer admin can turn **On** the AutoSync feature on Create and Edit mapping (Content Integration) screen. By default, the autosync checkbox is turned Off. Autosync feature supports the following:

- Synchronization of offers as well as variants with manually selected content as well as auto-created content.
- Synchronization can be stopped selectively for an individual offer as well as variant by breaking the association between content and the offer.
- Published Offers can also be auto-updated as a part of synchronization (subject to the configurations). For more details on configuration, refer *Content Integration Configuration and Installation Guide*.
- Offers can be auto-created as a part of synchronization in Publish mode (subject to the configurations). For more details on configuration, refer *Content Integration Configuration and Installation Guide*.
- In case of editing a content, if no offer is associated with that content a new offer will be created with respect to that content.

## Chapter 2. Offer configurations

After installation of Unica Centralized Offer Management, you must configure its properties, and create and assign roles to the users.

- To configure the properties, see [Unica Centralized Offer Management configuration properties on page 4](#).
- To create and assign roles, see [User roles on page 14](#).

### Unica Centralized Offer Management configuration properties

This section describes the Unica Centralized Offer Management configuration properties.

To access the properties, complete the following steps:

- Select **Settings > Configuration**.
- From the **Configuration categories** panel, expand **offer**.

#### offer

Properties in this category specify the default and supported locales for your installation of Unica Centralized Offer Management.

##### currencyLocales

###### Description

Specifies the locale used for setting currency for the offers. The value of defaultLocale and currencyLocales should be the same.

If you change this value, you must stop and restart your Unica Centralized Offer Management deployment before the change takes effect.

###### Default value

en\_US

###### Supported values

de,en,fr,ja,es,ko,pt,it,zh,ru,zh\_tw

##### supportedLocales

###### Description

Specifies the locales available in your installation of Unica Centralized Offer Management. List only the locales that you are using. Each locale you list uses memory on the server. The amount of memory that is used depends on the size and number of templates.

If you add locales after the initial installation, you must run the servlets again.

If you change this value, you must stop and restart your Unica Centralized Offer Management deployment before the change takes effect.

**Default value**

```
de,en,fr,ja,es,ko,pt,it,zh,ru,zh_tw
```

**defaultLocale****Description**

Specifies the supported locale in which you want Unica Centralized Offer Management to display for all users, unless explicitly overridden for specific users by Unica Centralized Offer Management administrators.

If you change this value, you must stop and restart your Unica Centralized Offer Management deployment before the change takes effect.

**Default value**

```
en_US
```

**offer | navigation**

The properties in this category specify options for navigation, such as Uniform Resource Identifiers, URLs, and ports.

**welcomePageURI****Description**

The Uniform Resource Identifier of the Unica Centralized Offer Management index page. This value is used internally by Unica applications. Changes to this value are not recommended.

**Default value**

```
jsp/index.jsp
```

**seedName****Description**

Used internally by Unica applications. Changes to this value are not recommended.

**Default value**

```
Offer
```

**type****Description**

Used internally by Unica applications. Changes to this value are not recommended.

**Default value**

```
Offer
```

## httpPort

### Description

The port number that is used by the application server for connections to the Unica Centralized Offer Management application.

### Default value

7001

## httpsPort

### Description

The port number that is used by the application server for secure connections to the Unica Centralized Offer Management application.

### Default value

7001

## serverURL

### Description

The URL of the Unica Centralized Offer Management installation. Browser will communicate via this URL, if there is a proxy between the browser and the server then it should be proxy URL. Accepts locators with either the HTTP or HTTPS protocol.

### Default value

`http://<server>:<port>/Offer`



**Note:** <server> must be lowercase.

## logoutURL

### Description

Used internally. Changes to this value are not recommended.

Unica Platform uses this value to call the logout handler of each registered application if the user clicks the logout link in suite.

### Default value

`/j_spring_security_logout`

## displayName

### Description

Used internally.



**Default value**`Offer`**serverURLInternal****Description**

Specifies the internal URL of the Unica Centralized Offer Management server. This value is used internally by Unica applications for server to server communications. So it should never be the proxy URL, instead it should be the direct URL.

**Default value**`http://<server>:<port>/Offer`

**Note:** <server> must be lowercase.

**offerDetailPageURI****Description**

Specifies the URL Unica Centralized Offer Management detail page. This value is used internally by Unica applications. Changes to this value are not recommended.

**Default value**`/om/offers/{id}`**OfferlistDetailPageURI****Description**

The Uniform Resource Identifier of the Unica Centralized Offer Management detail page. This value is used internally by Unica applications. Changes to this value are not recommended.

**Default value**`/om/offers/list/{id}`**offer | partitions | partitionTemplate**

The configuration properties in this section list information about your Unica Centralized Offer Management partitions.

**New category name****Description**

A name for the new partition to be created.

**Value**

Provide a relevant value and click **Save changes**.

## offer | partitions | partition<n> | Unica Insights Reports

The configuration properties in this section list information about the Unica Insights Reports configuration Unica Centralized Offer Management in offer partition <n>.

### offerAnalysisTabOnDemandFolder

#### Description

Specifies the location where the object-specific reports are configured.

#### Value

```
/Affinium Campaign - Object Specific Reports/offer/
```

## offer | partitions | partition<n> | reports

The configuration properties in this section list information about the report configuration Unica Centralized Offer Management in offer partition <n>.

### offerAnalysisTabCachedFolder

#### Description

Specifies the location where the cached folder for reports is configured.

#### Value

```
/content/folder[@name='Affinium Campaign - Object Specific Reports']  
/folder[@name='offer']/folder[@name='cached']
```

### offerAnalysisTabOnDemandFolder

#### Description

Specifies the location where the object-specific reports are configured.

#### Value

```
/Affinium Campaign - Object Specific Reports/offer/
```

## offer | partitions | partition<n> | Data Sources | (Data\_Source\_Template)

The configuration properties in this section lists information about the data source configuration template available in the Unica Centralized Offer Management in offer partition <n>.

### JndiName

#### Description

The JNDI name of the Campaign data source.

#### Value

```
campaignPartition1DS
```

**Type****Description**

The database type used in Campaign.

**Value**

<DatabaseType>

**offer | partitions | partition<n> | server | systemCodes**

The configuration properties in this section lists information configured system codes available Unica Centralized Offer Management partition <n>.

**offerCodeDelimiter****Description**

Specifies the delimiter used for offer codes

**Value**

-

**allowVariableLengthCodes****Description**

Specifies if variable length codes are allowed or not

**Value**

FALSE

**displayOfferCodes****Description**

Specifies whether the complete offer should be displayed or not

**Value**

FALSE

**offer | partitions | partition<n> | server | internal**

The configuration properties to use Interact with Unica Centralized Offer Management.

**internalIdLowerLimit****Description**

Specifies the lower limit of the internal ID.

**Value**

0

## InternalIdUpperLimit

### Description

Specifies the upper limit of the internal ID.

### Value

4294967295

## InteractInstalled

### Description

Specifies whether Interact is installed or not

### Value

NO

## deliverInstalled

### Description

Indicates that Unica Deliver is installed.

By default, the installer sets this property to `NO` for the default partition in your Unica Deliver installation. If you select `YES`, Unica Deliver features are available in the Unica Centralized Offer Management interface. For additional partitions where you installed Unica Deliver, you must configure this property manually.

### Value

NO

## staticVariantEnabled

### Description

Specifies whether static variant feature is enabled or not

### Value

Yes/No

### Default Value

Yes

## defaultOfferListingView

### Description

Specifies the default view of Offer listing

### Value

Grid View and Card View

**Default Value**

Card View

**offer | partitions | partition<n> | offerCodeGenerator**

The offer code generator configured with Unica Centralized Offer Management.

**offerCodeGeneratorClass****Description**

Specifies the class name of the offer code generator

**Example**

```
com.unica.campaign.core.codegenerator.samples.ExecutableCodeGenerator
```

**offerCodeGeneratorConfigString****Description**

Specifies the location where the config string will be stored

**Example**

```
./bin
```

**defaultGenerator****Description**

Specifies the application that will be used for generating codes.

**Example**

```
uacoffercodegen.exe
```

**offerCodeGeneratorClasspath****Description**

The `offerCodeGeneratorClasspath` property specifies the path to the class Unica Centralized Offer Management uses as its offer code generator. It can be either a full path or a relative path.

If the path ends in a slash (forward slash `/` for UNIX™ or backslash `\` for Windows™), Unica Centralized Offer Management assumes it to be a path to a directory that contains the Java™ plug-in class that should be used.

If the path does not end in a slash, Unica Centralized Offer Management assumes it is the name of a jar file that contains the Java class.

If the path is relative, Unica Centralized Offer Management assumes it is relative to the Unica Centralized Offer Management application home directory.

**Example**

```
codeGenerator.jar
```

## offer | partitions | partition<n> | Content Integration

Unica Content Integration configurations for Unica Centralized Offer Management.

For more information, see *Unica Content Integration Installation and Configuration Guide*.

### Configuring the `COM` node for Content Mapping

The Content Mapping feature is introduced for user. For the Content Mapping feature to work, you must configure a `COM` node. To configure the node, complete the following steps:

1. Navigate to **Content Integration > Data Sources > (CMS Configuration Template)**
2. Provide values for the following fields:
  - **System Identifier** - Enter the value `COM`.
  - **User credentials** - Select `Default user`.
  - **defaultUserCredentials** - Provide the username.
  - **Data source name for credentials** - Enter the value `COMDS`.
  - **Anonymous Content Access** - Select `Yes`.
3. Click **Save changes**.

This ensures that mapping can be established between Centralized Offer Management and Content Integration attributes. For more information on mapping, see [Mapping content with an offer template on page 28](#). If there are multiple partitions, you must access each partition and perform *Step 1* through *Step 3* on all the partitions.

## offer | partitions | partition <n> | validation

The Validation Plugin Development Kit (PDK), delivered with Centralized Offer Management, allows third parties to develop custom validation logic for use in Centralized Offer Management. Properties in the `partition[n] > validation` category specify the classpath and class name of the custom validation program, and an optional configuration string.

### validationClass

#### Description

The `validationClass` property specifies the name of the class used for validation in Centralized Offer Management. The path to the class is specified in the `validationClasspath` property. The class must be fully qualified with its package name. An example is as follows:

```
com.unica.campaign.core.validation.samples.SimpleCampaignValidator
```

The example indicates the `SimpleCampaignValidator` class from the sample code. This property is undefined by default, which causes Centralized Offer Management to perform no custom validation.

#### Default Value

No default value defined

## validatorConfigString

### Description

The `validationConfigString` property specifies a configuration string that is passed into the validation plugin when Centralized Offer Management loads it. The use of the configuration string may vary, depending on the plugin used.

This property is undefined by default.

### Default Value

No default value defined

## validationClasspath

### Description

The `validationClasspath` property specifies the path to the class used for custom validation in Centralized Offer Management.

- Use either a full path or a relative path. If the path is relative, the behavior depends on the application server that is running Centralized Offer Management. WebLogic uses the path to the domain work directory, which by default is `C:\bea\user_projects\domains\mydomain`.
- If the path ends in a slash (forward slash `/` for UNIX™ or backslash `\` for Windows™), Centralized Offer Management assumes that it points to the location of the Java™ plug-in class that should be used.
- If the path does not end in a slash, Centralized Offer Management assumes that it is the name of a `JAR` file that contains the Java class. For example, the value `<CAMPAIGN_HOME>/devkits/validation/lib/validator.jar` is the path on a UNIX platform that points to the `JAR` file that is provided with the plug-in developer's kit.

This property is undefined by default, which causes the property to be ignored.

### Value

NO

## offer | ProductReindex

The product reindex details Unica Centralized Offer Management.

## startTime

### Description

Specifies the start time for product reindex.

### Value

12:00:00

## interval

### Description

Specifies the interval in minutes.

### Value

3600

## User roles

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

- For information on assigning `OfferAdmin` role, see [Assigning OfferAdmin role to the user on page 14](#)
- For information on assigning `OfferUser` role, see [Assigning OfferUser role to the offer user on page 14](#)
- For information on assigning custom user roles and permissions, see [Assigning custom roles and permissions to the user on page 15](#)



**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 Unica Platform home page, select **Settings > User roles and permissions**.

### Result

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**.

### Result

The **OfferAdmin** page appears.

4. In the **Users** section, select the admin user. For example, `asm_admin`.

### Result

The **asm\_admin (asm\_admin)** user details page appears.

5. Select **Edit roles**.

### Result

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 Unica Platform home page, select **Settings > User roles and permissions**.

**Result**

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**.

**Result**

The **OfferUser** page appears.

4. In the **Users** section, select the admin user. For example, *demo*.

**Result**

The **demo (demo)** user details page appears.

5. Select **Edit roles**.

**Result**

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.

### About this task

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

1. From the Unica Platform home page, select **Settings > User roles and permissions**.

**Result**

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**.

**Result**

The **Global Policy** page appears.

4. Select **Add roles and assign permissions**.

**Result**

The **(Global Policy)** page appears.

5. Click **Save and edit permissions**.

**Result**

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**.

## Autosync Configurations

Autosync feature is supported for all CMSes. The prerequisite for such a synchronization is that the CMS should send the create, update and expire events to the Content Integration framework and CMS specific plugin needs to be developed in Content integration framework to process the event.

Content integration plugin for DX is already shipped with Unica. The plugin expects the events in following manner. This plugin automatically supports all the authentication methods supported by Content Integration Framework.

### Content Created event URL

POST <Content Integration framework base URL>/api/AssetPicker/webhook/{systemId}/events/created/{contentId}

### Content Updated event URL

POST

<Content Integration framework base URL>/api/AssetPicker/webhook/{systemId}/events/updated/{contentId}

### Content Expired event URL

POST

<Content Integration framework base URL>/api/AssetPicker/webhook/{systemId}/events/deleted/{contentId}

DX requires a CustomWorkflowAction to be developed on their side to be able to send these events to Unica. To understand more about CustomWorkflowAction please refer the link: [https://help.hcltechsw.com/digital-experience/9.5/wcm/wcm\\_dev\\_api\\_custom\\_workflow.html](https://help.hcltechsw.com/digital-experience/9.5/wcm/wcm_dev_api_custom_workflow.html) .You may also contact HCL DX services team to understand more.

For more information on configuring Unica Content Integration with HCL DX, see the *Configuring the out-of-the-box integrations offered by Content Integration* topic in *Unica Content Integration Installation and Configuration Guide*.

## Configuring the COM plugin with the Content Integration node

You must configure the COM plugin within the Content Integration node.

### About this task

To perform the configuration, complete the following steps:

1. Ensure that the **COM** node for **Content Integration** is configured. For more information, see the "offer | partitions | partition<n> | Content Integration" topic in *Unica Centralized Offer Management Administrator Guide*.
2. Select **COM** and select **Edit settings**.
3. Provide values for the following fields:

- a. **Default user for credential:** Offers will be created using this user account. For example, `autoSyncUser`.
- b. **Additional parameter:** Provide folder details and policy details here. For example:

```
folderId: 4
policyId: 2
```

**Note:**

- For **Default user for credential**, provide credentials of a user who has privileges to create, modify, and delete content in DX .
  - For **Additional parameters**, if you do not provide a folder ID, the offer is created under All offers folder.
  - For **Additional parameters**, if you do not provide a policy ID, the policy assigned to the user will be assigned as the policy of the offer. If the user has multiple policies assigned, Autosync will fail. If there is a mismatch in the policy ID and the user policies, Autosync will fail.
4. Navigate to **HTTPS Gateway** and provide value for the **Base URL** field. The value should be the URL of offer deployment.
5. Navigate to **REST** and for the **Authentication type** field, provide the value `Unica Token`.

## Kafka configurations for Autosync

There is a new configuration node inside root level Content Integration node, called Kafka configuration. By default, the Content Integration Framework routes the content events received from CMS via application memory.

It can also use Kafka for routing content events to Centralized Offer Management. For this, you have to make all the appropriate configurations. Currently, the following security protocols are supported for Kafka connectivity:

- `SSL`
- `SASL_PLAINTEXT`
- `SASL_SSL`

For `SASL`, only `PLAIN` mechanism is supported. Select the **Use Kafka** checkbox if you require Kafka integration for routing content events. Deselect the **Use Kafka** checkbox to switch back to in-memory routing.



**Note:** Create a topic named `COM.in` in Kafka. If you want to configure `SASL` authorization for Kafka integration, assign `READ` and `WRITE` permissions to the configured Kafka user & ci-consumer consumer group.

Some Kafka config properties and their description are as follows:

Kafka Config Property	Description
<b>Use Kafka (checkbox)</b>	Select or deselect to opt in or opt out of Kafka integration.
<b>Bootstrap servers</b>	Comma separated list of Kafka bootstrap servers (brokers).

Kafka Config Property	Description
<b>SASL mechanism</b>	The required SASL mechanism.
<b>Unica user for data source</b>	Unica user, holding the required data sources containing SASL and/or SSL secrets.
<b>Data source name for SASL Jaas credentials</b>	Name of the user data source containing SASL credentials.
<b>SSL - Trust store location</b>	Absolute path to the trust store (.jks).
<b>SSL - Data source for truststore password</b>	Name of the user data source containing the trust store password (username from the data source is ignored).
<b>SSL - Keystore location</b>	Absolute path to the key store (.jks).
<b>SSL - Data source name for keystore password</b>	Name of the user data source containing the key store password (username from the data source is ignored).
<b>SSL - Data source name for key password</b>	Name of the user data source containing the key password (username from the data source is ignored).
<b>Kerberos - Configuration file path</b>	Path to Kerberos configuration file. For example, on Unix, it is generally /etc/krb5.conf and on Windows it can be found at C:/Windows/krb5.ini.
<b>Kerberos - Keytab file path</b>	Path to Kerberos keytab file.
<b>Kerberos - Principal</b>	Kerberos principal name having access to kafka service.
<b>Kerberos - Service Name</b>	Kerberos service Name for kafka. (as per sasl.kerberos.service.name configuration for Kafka cluster)

## API security filter configuration

By default, Unica Platform protects webhook invocations. To change the security settings for webhook, create an API security filter under *Unica Platform | Security | API management | Unica Content Integration*.

To set up the API security filter for HCL DX:

- For the **API URI** property, enter `/webhook/DX-CORE/*`. Specify other security settings accordingly. For more information, see **API security filter** section in *Unica Platform Administrator's Guide*.
- To turn the authentication off, deselect **Require authentication for API access**.

For multi-partitioned setup, configure HCL DX with an aliased system identifier. In such case, enter `DX-CORE` in system identifier followed by a space and an alias. For example, `DX-CORE partition2`, `DX-CORE partition3` etc. (Avoid using special characters and space in alias. Only English alphanumeric characters are recommended.) For multi-partitioned setups, configure a separate API security filter for each partition.



**Note:** If **API URI** contains a space, it must be replaced with %20. For configuring API security filter, for `DX-CORE` partition2, provide the following value for **API URI** : `/webhook/DX-CORE%20partition2/*`.

# Chapter 3. 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 20](#)
- [Offer template definitions on page 23](#)
- [Offer without template settings on page 37](#)

## 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 41](#).
  - To view standard attributes, see [Viewing standard attributes on page 21](#).
  - To modify standard attributes, see [Editing standard attributes on page 22](#).
- **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 20](#).
  - To view created custom attributes, see [Viewing custom attributes on page 21](#).
  - To modify custom attributes, see [Editing custom attributes on page 22](#).

## Creating custom attributes

You can define custom attributes for use in offers.

### Before you begin

For a detailed information on the fields mentioned in the procedure, see [Fields in add attribute details page on page 41](#).

### About this task

To create custom attributes, complete the following steps:

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

#### Result

The **Offer settings** page appears.

2. Select **Custom attributes definitions**.

#### Result

The **Attribute definitions** page appears.

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

**Result**

The **Add Attribute** page appears.

4. Provide values for the Basic options, which include:

- **Display name**
- **Internal name**
- **Description**

5. Select values for the Formatting options, which include:

- **Form element type**
- **Maximum Length**

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

7. Click **Save**.

**Result**

You can view the new custom attribute in the Attribute definitions page. For more information, see [Viewing custom attributes on page 21](#).

## Viewing standard attributes

To view the standard attributes, complete the following steps:

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

**Result**

The **Offer settings** page appears.

2. Select **Custom attributes definitions**.

**Result**

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 22](#).

4. When you click on any Standard or Custom attribute, then attribute summary page appears with basic and formatting attribute details.

## Viewing custom attributes

To view custom attributes, complete the following steps:

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

**Result**

The **Offer settings** page appears.

2. Select **Custom attributes definitions**.

**Result**

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 22](#).
- 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**.

### Result

The **Attribute definitions** page appears.

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

### Result

The attribute details page appears.

3. 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**.

### Result

The **Attribute definitions** page appears.

2. Select **Custom**.

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

### Result

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 20](#).

- **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 20](#).

- User cannot edit the selected form element type, except for String type attribute. User can convert String type attribute to Picker-URL. This action cannot be reversed, once the attribute is converted to Picker URL and saved, you cannot convert it back to String type attribute.
- Depending on the form element type, you can either edit the decimal places or sort order. The maximum length of the form element type is 1024 characters. User can extend the maximum length beyond 1024 characters for the following custom attributes:
  - Textfield String
  - Selectbox String
  - Picker URL

For this you need to update the expected length (same value) should be updated in these four tables UA\_ENUMATTRVALUES, UA\_OFFERATTRIBUTE, UA\_OFFERSUPPRESSION and UA\_OFFERTEMPLATTR simultaneously.



**Note:** The maximum length of the above mentioned custom attributes cannot go below 1024 characters.

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.

### About this task

To create custom templates, complete the following steps:

On **Offer template definitions** page, templates are displayed under two different states **Active** and **Retired**.

1. In the **Offer template definitions** page, click **+ Add new template**.

#### Result

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**
- **Thumbnail url** - User can either directly add the thumbnail url or can click on the Browse button and select a thumbnail from CIF.
- 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**.


**Result**

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 20](#).
- **Parameterized attributes**
- **Static attributes**
- **Internal attributes**

 **Note:** From version 12.1.1 onwards, hidden attributes category is converted to internal attributes category. However, hidden attributes created before 12.1.1 will remain invisible in the offers.

- 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 **Internal 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 **Internal 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. User can define **Visibility rules** for the selected attributes in a template. Rules set on one attribute will decide the visibility of other attributes. Visibility rule can be set any type of attribute. When an offer is created using the templates having visibility rules applied on the attributes, then based on the set visibility rules the attributes are visible or internal.


To define visibility rules, complete the following steps:


- Select the attribute for which you want to define visibility rule, click **visibility rules > set rule**


#### **Result**


The **set visibility rules** page appears.

- From the dropdown of the Name field, select the attribute.
- Switch the toggle button for setting the In or Not in option. Depending on the operation becomes true the attribute will be visible else invisible.
- From the dropdown of the Value field, select the appropriate rules.

 **Note:** Attribute(s) can have one rule but one rule can have multiple conditions, which are independent of each other as they are OR operation. The multiple conditions have OR operation between them. Hence, anyone

 one them turns out to be true the entire rule turns true. Rule defining attribute cannot be deleted from the template.

 **Note:** Multiple attributes can be selected for setting the visibility rule. Visibility rule defining attribute can be internal but no rules can be set on the internal attributes. Any attribute in internal state cannot have rules set on them but it can define visibility rule for other attributes.

 **Note:** Visibility rule will have an option Always invisible. Default value for the Always invisible attributes are mandatory at template level. To avoid impact on the existing customer, all internal attributes will be automatically become Always invisible.

- Click **Save**.

- a. Click **Next**.

#### **Result**

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 internal 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 46](#).
    - **Internal attributes** - Expand the section and provide the values for the attributes.
      - i. Internal attributes will now be available at offer level.
      - ii. Internal attributes will behave same as the Parameterised attributes except for two things:
        1. Internal attributes will not be available for other Unica products. These attributes are available only for reporting purposes.
        2. Attributes under the internal attribute section can be both mandatory or non-mandatory.
      - iii. Internal attributes will support RICH TEXT but not IP ID or IP Name.

iv. Mapping can be defined for internal attributes.



**Note:** When the template is not in use, the sequence of attributes under Static, Parameterised and Internal attribute section can be rearranged.

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.

c. If the offer has a `Picker - URL` attribute, you can see the preview of the content. Users are allowed to view the content and its details in the Offer screen. Select the  icon succeeding the URL.

The following are some conditions related to content preview:

- If you do not have the `Content Integration User` role assigned, an error message appears instead of the preview.
- If you manually add the URL or modify the URL after content selection, an error message appears instead of the preview.
- If the API cannot fetch the data, an error message appears instead of the preview.
- If the content is removed from the CMS, the preview does not appear.
- If the CMS, or the plugin for the CMS, does not support retrieving individual content details, the preview does not appear.
- If the Content Integration API does not recognize the image or non-image MIME-type from CMS, the default thumbnail appears in the preview.
- If the Content Integration API recognizes the MIME-type from CMS, but cannot fetch the thumbnail due to connectivity issues between Content Integration and CMS, the `Image not accessible` icon appears with the content details in the preview.
- If the Content Integration API recognizes the non-image MIME-type from CMS, but cannot fetch the thumbnail due to connectivity issues between Content Integration and CMS, the `Thumbnail not accessible` icon appears with the content details in the preview.

When you are previewing the content, if required, you can download the content from the CMS. Click the download icon to download the content to your system.

d. If required, map a content artifact to the template. Select **Content Integration**.

#### Result

The Content Integration dialog appears. For more information, see [Mapping content with an offer template on page 28](#).

e. If you have added multiple `Select box - Database` attributes in the parameterized attributes section or the static attributes section, you can add dependency to the attributes. For more information, see [Select box - database attribute dependency on page 32](#).

5. Click **Save**.

**Result**

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

**Mapping content with an offer template**

This feature enables users to auto-populate multiple offer attributes from the selected content artifact. You can map the content artifact when creating a new custom template or modifying an existing template.

For mapping to work, you must configure a node named `COM` under the Content Integration node. For more information, see [offer | partitions | partition<n> | Content Integration on page 12](#).

The following are some conditions related to mapping content attributes with offer attributes in a template:

- You must have the `Content Integration User` role assigned.
- Mapping occurs only with attributes having compatible data types.
- You can map content attributes when you create a new template or when you modify an existing template.
- User can map multiple CMS repository with offer attributes in a template. For information on multiple CMS repository mapping, see [Mapping multiple CMS repository on page 30](#)
- You can map only the attributes in the **Parameterized attributes** section or the **Static attributes** section.
- Based on the selected content, mapping populates the default values of attributes in the templates or offers.
- Although mapping automatically populates the content attribute values, you can change these values if required.
- When you modify a template, if you change only the content, the existing mapping is retained. If you change the third-party CMS or the content type or both, the existing mapping is removed and you must map content and offer attributes again.
- If a multi-value content attribute is mapped to an offer text attribute, it will display as a comma separated value.
- If a content date attribute is mapped to a number attribute, it will be saved as a timestamp.
- Validation from CMS for content attributes does not apply to offer attributes. Only the offer validations will apply.
- Mapping only checks for compatible data types and not validations. Even if the mapping is successful, there may be validation errors.
- Mapping does not support time zone conversion.
- The `Select Box- String` type of offer attributes can be mapped with any CMS attribute that is compatible with string. The value for the `Select Box- String` is autopopulated only if the `Select Box- String` attribute already has the value of the CMS attribute that is present in the source list of the `Select Box- String` attribute.
- In case of HCL DX-CORE and HCL DX Media Library CMS:
  - HCL DX-CORE restricts category selection when creating an offer
  - HCL DX Media Library does not restrict category section when creating an offer

Based on the content category you select during template creation, the conditions will apply during offer creation.

Additionally, if the selected category has restrictions, you can only select content that belongs to the same category.

The content that do not match the category will be disabled for selection.

**About this task**

To map offer attributes in a template to a content artifact attributes, complete the following steps:

1. Perform steps 1 through 4 in [Creating custom templates on page 23](#).

2. Select **Content Integration**.

**Result**

A dialog appears.

3. In the **Select content** section of the dialog, complete the following steps:

a. Select the required **repository**.

If you select HCL DX repository, there are certain conditions that you need to know. See the topic "Searching for Specific Content Types" in the *Unica Content Integration User's Guide*.

b. Select the appropriate Content Type from Search dropdown.

c. Select the content and click **Next**.

4. In the **Map attributes** section of the dialog, complete the following steps:

a. Map the required offer attributes to the content attributes. The title is the offer attribute and the **Mapped to** field is the content attribute. For conditions related to mapping offer attributes and content attributes, see [Mapping conditions on page 28](#).

b. Click **Save**.

**Result**

The mapped attributes, along with information like the selected CMS and content type, will appear within Default values section in read-only mode. The selected offer attributes are populated by the values from the content attributes. The automatically populated offer attributes will have a subscript `AutoPopulated`.

## Modifying the mapping

### Before you begin

You can modify the mapping to an existing content, or you can modify the selections for content type, content, or all three.



**Note:** While modifying the mapping, you cannot change the selected CMS repository.

1. Perform *step 1 to step 3* in [Editing custom templates on page 35](#).

2. Click on the edit icon present next to the respective CMS mapping details, below **Content Integration** section.

3. To modify the mapping of attributes for an existing content, complete the following steps:

a. Select the appropriate Content Type from Search dropdown or from the CMS sub folders.

b. Select the appropriate content and click **Next**.

c. In the **Map attributes** section of the dialog, change the existing value to `select` for the attributes to do not want to map.

d. From the dropdown of **Mapped to** field, select the appropriate CMS entity.

- e. Click on **Save**. Mapping is saved and user is redirected to the template creation screen.



**Note:** If there is only one attribute mapped, you cannot change the value to `select` for that attribute.

## Deleting the mapping

To delete the mapping of offer attributes, complete the following steps:

1. Perform *step 1 to step 3* in [Editing custom templates on page 35](#).
2. Click on the delete icon present next to the respective CMS mapping details, below **Content Integration** section.
3. A confirmation message appears saying **Are you sure? This action will remove mapping and cannot be undone**. Click on **Yes, sure**.
4. The mapping is deleted.



**Note:** User can delete the mapping completely without leaving any attribute.

## Mapping multiple CMS repository

### About this task

For mapping, multiple CMS repository with offer attributes in a template complete the following steps:

1. Select **Content Integration**.

#### Result

A dialog appears

2. In the **Select content** section of the dialog, complete the following steps:
  - a. Select the required **repository**.
  - b. Select the appropriate Content Type from Search dropdown.
  - c. Select the content and click **Next**.
3. In the **Map attributes** section of the dialog, complete the following steps:
  - a. Map the required offer attributes to the content attributes. The title is the offer attribute and the **Mapped to** field is the content attribute. For conditions related to mapping offer attributes and content attributes, see [Mapping conditions on page 28](#).



**Note:** For DX, a new content based attribute is added, which allows to download the content

- b. Click **Save**.
4. Repeat *step 1 to step 3* in [Mapping multiple CMS repository on page 30](#) for multiple CMS mapping.



5. Mapped CMS repositories are listed on the template screen under Content Integration section.



**Note:** CMS repository once mapped will no longer be available in the dropdown of Repository field on Content integration screen. It would be available again only when the mapping is deleted.

## Modifying the multiple mapping

### About this task

For information on modifying the multiple mapping, see [Modifying the mapping on page 29](#)

## Deleting the multiple mapping

### About this task

For information on deleting the multiple mapping, see [Deleting the mapping on page 30](#)

## Custom action

To integrate different services that takes several attributes from COM, process it and in return, populate the other offer attributes, complete the following steps:

1. Perform steps 1 through 4 in [Creating custom templates on page 23](#).
2. Select **Custom Action**

### Result

A dialog appears.

3. Under Metadata provide appropriate values for the following fields:

- Action name - Mandatory field
- Application to be Called - Mandatory field.

Supports three applications, they are:

- Snap-CAST
- GoogleVision
- GoogleLanguage
- Azure



**Note:** These four are out of the box plugins. However, customers and partners can build new plugins to integrate with any other systems. For more information, see *Unica Content Integration Developer Guide* for how to build plugins and *Unica Content Integration Installation and Configuration Guide* to on-board new plugins.

- Service to be Called - Mandatory field.

Depending on the application service autopopulates in the field.

- Snap-CAST - sentiment-analysis
- GoogleVision - image-analysis
- GoogleLanguage - text-sentiment-analysis

- Azure - image analysis
- Snap-CAST - advertisement learning
- Attributes to be passed (to service) - It is a Mandatory field.



**Note:** In the top right corner of the UI, you will see a brief summary of selected service, which helps you in attribute selection.



**Note:** For Snap-cast there is a bug restricting the visibility of help snap-cast leaning. Snap-cast is looking into this limitation (ticket no: HMA-334419) and it will be addressed in future versions. Below information can help to know about Snap-cast leaning.

Snap-CAST learning offer machine learning services. User can train the machine to provide sentiment analysis based on the provided inputs. User need to provide at least one image url, one image, one text data and one rich text (csv formatted) attribute required for learning API. Rich text attribute to be mapped to 'All tags CSV', which must have comma separated text values. Initial value can be obtained by executing sentiment analysis custom action. Different categories of trainings are supported i,e 'Image','Subject','Keyword','Quantifiable','Bucket','Sentiment' 'Time sensitive event' and 'Custom grouping'.

From the dropdown of the field select the attribute to associate this service.

4. Under Response attributes mapping, map the service response with the COM attributes.



**Note:** Refer the help tooltip to know about the list of supported attributes with each service and select only the supported attributes. In case any unsupported attribute is selected, then the API may not give intended result.

5. Click on **Save**.

## Select box - database attribute dependency

If you have added multiple `Select box - Database` attributes to your template, you can add a dependency between the attributes.

Once the dependency is set between two `Select box - Database` attributes, the options in the dependent attribute changes based on the selection made in the parent attribute.

### Before you begin

See [Creating custom attributes on page 20](#) and [Creating custom templates on page 23](#).

### About this task

You can add a dependency, or modify an existing dependency, when you create a template or modify a template. The conditions for adding a dependency are as follows:

- There must be at least two or more `Select box - Database` attributes added to the custom template.
- If you want to establish dependency between `Select box - Database` attributes, you must ensure that the attributes exist either in the parameterized attributes section or the static attributes section.
- If you want to add a dependency, you should add it between compatible attributes. Additionally, the option that you select for the key column of the parent attribute, should exist as one of the options in the key column of the child attribute, and it should have the same data type.
- For better performance, when you assign a dependency, ensure that you create an index on the foreign key column of the dependent attribute.
- For better performance, set the parent key as the primary key.
- Avoid defining a circular dependency between attributes as it is not supported.
- If you delete dependencies from an offer template, and if that offer template was used in multiple offers, the changes will reflect on all existing offers.
- If you have used `Select box - Database` attributes in dependencies, you cannot delete it or move it to different attribute sections.
- If you have defined a dependency between the `Select box - Database` attributes, do not change the table schema for the attributes.

## Assigning attribute dependency

To assign attribute dependency, complete the following steps:

1. In the **Default values** section of the **New Offer template** or **Edit Offer template** page, click **+ Attribute dependency**.

### Result

The **Add attribute dependency** dialog appears.

2. The dropdown on the left is the child attribute. Select the dependent child attribute.
3. The dropdown on the right is the parent attribute. Select the parent attribute that the child attribute depends on.
4. To add the dependency, click **Add**.
5. To add more dependencies, perform *step 2* through *step 4*.
6. Click **Save**.

### Result

The **Default values** section appears and you will see the dependency within the **Dependent attributes** section at the bottom of the page.

## Modifying attribute dependency

To modify existing dependency, complete the following steps:

1. In the **Default values** section of the **New Offer template** or **Edit Offer template** page, click **+ Attribute dependency**.

### Result

The **Add attribute dependency** dialog appears.

2. Click the row that you want to modify and update the child attribute, the parent attribute, or both.
3. Click **Save**.

### Result

The **Default values** section appears and you will see the updated dependency within the **Dependent attributes** section at the bottom of the page.


## Deleting attribute dependency

To delete existing dependency, complete the following steps:

1. In the **Default values** section of the **New Offer template** or **Edit Offer template** page, click **+ Attribute dependency**.

### Result

The **Add attribute dependency** dialog appears.

2. Click the  icon succeeding the dependency to delete it.
3. Click **Save**.

### Result

The **Default values** section appears and you will see that the **Dependent attributes** section no longer exists.

## 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 Unica Platform home page, select **Settings > Offer settings**.

### Result

The **Offer settings** page appears.

2. Select **Custom template definitions**.

### Result

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 35](#).
  - Edit the custom templates. For more information, see [Editing custom templates on page 35](#).
  - Retire an active custom template. For more information, see [Retiring active templates on page 36](#).
  - 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.

### About this task

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**.

#### Result

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**.

#### Result



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.

### About this task

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 23](#).

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 23](#).
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 internal static attributes.
  - c. For any further modifications, see [Creating custom templates on page 23](#).
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.

### Result

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.

### Result

The success message and the **Offer template definitions** page appears.



**Note:** Offer template once retired can be re-activated and used for creating offers.

## 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.

### About this task

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 20](#).
2. Add the attribute to an offer template. For more information, see [Creating custom templates on page 23](#).
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

### About this task

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 20](#) or [Editing custom attributes on page 22](#).

## 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 37](#).

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 15](#).

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 37](#).

An administrator can also disable the **Offer without template settings** feature. For more information, see [Disabling and enabling Offer without template on page 38](#).

## Creating offers without template settings

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

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

### Result

The **Offer settings** page appears.

2. Select **Offer without template settings**.

### Result

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,  
O00001-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**.

## Disabling and enabling Offer without template

You can disable Offer without template feature when it is not required and enable it when required.

### About this task

To disable or enable Offer without template feature, complete the following steps:

1. To disable Offer without template settings:
  - a. Select **Settings > Offer settings**.  
**Result**  
The **Offer settings** page appears.
  - b. Select **Offer without template settings**  
**Result**  
The **Offer without template settings** page appears.
  - c. Select **Disable offer without template** and click **Save**.
2. To enable Offer without template settings:
  - a. Select **Settings > Offer settings**.  
**Result**  
The **Offer settings** page appears.
  - b. Select **Offer without template settings**  
**Result**  
The **Offer without template settings** page appears.
  - c. Deselect **Disable offer without template** and click **Save**.

## Webhook Support for Offers

### About this task

Webhooks helps in transferring data from Centralized Offer Management System to other systems. With the help of this feature centralized Offer Management can call the Rest APIs of third party systems whenever offer is created, updated or deleted in the Centralized Offer Management. Offer admin with global policy can access Webhook.



Webhook applies for offer and offer variants.

Existing Webhook can be disabled, re-enabled, edited and deleted.

### Add Webhook

1. From the Unica Platform home page, select **Offer Settings > Webhook**.

#### Result

The **Webhook Definitions** page appears.

2. Select **Add Webhook**

#### Result

The **Add webhook** page appears

3. Provide appropriate values for the following fields:

- Name - Mandatory field
- Description
- Select event - Select events from the dropdown. Options available are:
  - Select All
  - Offer Created
  - Offer Updated
  - Offer Deleted
  - Offer state changed
- Execution scope - Select from **All Offers** and **Offers from selected templates**. If user select All Offers then Webhook will be executed for all the Offers irrespective of template. This also includes the Offers created without template. If user select Offers from selected templates, then Webhook will be executed for all the Offers created using selected templates. Select template from the field dropdown.
- Webhook Post URI - Mandatory field
- Authentication mode - Three modes available:
  - Basic
  - Bearer token
  - Unica manager (loggedin user)
- Username of datasource - Mandatory field
- Name of datasource - Mandatory field



**Note:** For Basic and Bearer Token Authentication mode, fields Username of datasource and Name of datasource are mandatory fields.



**Note:** On saving Webhook with authentication mode as Unica Manager, Username of datasource and Name of datasource fields are hidden on Webhook summary screen.

4. Click Save & Enabled

Once a Webhook is saved it is available on Webhook Listing page.



**Note:**



- Once a Webhook is created, it will get executed and send data from Centralized Offer Management System to other systems. Webhook will be executed only when the configured event is triggered.
- Offers created/updated through autosync will execute Webhook.
- Offers implicitly deleted as a result of folder delete will execute Webhook.
- Offer when edited and added new attribute will execute Webhook only if all offers is selected. [and not for the old template of the offer before adding attribute].
- If template is edited and new attribute is added to the template which was used for offer creation- no Webhooks are executed.

## API documentation

You can access the API documentation via Swagger.

To access the API documentation, select **Settings > Offer settings > API Documentation**

The Swagger UI opens in a new window. To try out the requests and see the responses, you must have a valid user session with Unica.

If you are using Microsoft Internet Explorer, you may notice some errors as Swagger UI does not support Internet Explorer.

# Chapter 4. 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



**Note:** Browse button is available next to Creative URL field on template screen. Click this button to navigate to the Content Integration screen.





## 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.

**Table 2. Fields in Add Attribute Details Page (continued)**

Field Name	Description
Internal name	<p>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").</p> <p>The internal name must be globally unique, must start with an alphabetic character, cannot include spaces, and are not case-sensitive.</p>
Description	A description of the attribute.
Form element type	<p>Specify the type of data to be stored in the attribute field for offers.</p> <p> <b>Important:</b> After you add the custom attribute, you cannot change its data type.</p>
Form element type Text field - String	<p>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.</p> <p> <b>Important:</b> Decreasing the length of an existing attribute truncates existing values, which, if the field is used for matching purposes, can adversely affect response tracking.</p>
Form element type Text field - Numeric	<p>Specify the number of decimal places to display to the right of the decimal point.</p> <p> <b>Note:</b> 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.</p>
Form element type Text field - Date	
Form element type Text field - Currency	<p>Specify the number of decimal places.</p> <p> <b>Important:</b> The currency value reflects the number of decimal places that are customarily used in the local currency. If you specify a number</p>



**Table 2. Fields in Add Attribute Details Page (continued)**

Field Name	Description
	<p> for decimal places that is less than the number commonly used, the currency value is truncated.</p>
<p>Form element type Select box - String</p>	<ul style="list-style-type: none"> <li>• Specify a Maximum string length</li> <li>• 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.</li> </ul> <p> <b>Important:</b> After the offer template, or offer is saved, the user cannot remove the new list item. The value 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.</p> <ul style="list-style-type: none"> <li>• 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.</li> <li>• 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.</li> <li>• Specify the Sort order to determine how values appear in the list.</li> </ul>
<p>Form element type Select box - Database</p>	<p>This element type attribute does not support Engage integration. You must provide values for the following fields:</p> <ul style="list-style-type: none"> <li>• <b>Use values from this table</b> - Lists the tables or the database view of the Unica Campaign schema for the logged in user's partition. You can create LOOKUP tables in Campaign schema for this feature. You cannot access LOOKUP tables from any other schema, for example Unica Plan. To access LOOKUP tables of other schema, you must create a DB view in the Campaign schema pointing to the table from the other schema.</li> <li>• <b>Key column</b> - Lists all the columns for the selected database table.</li> </ul> <p> <b>Note:</b></p>


**Table 2. Fields in Add Attribute Details Page (continued)**

Field Name	Description
	<div data-bbox="581 321 623 373" data-label="Image"> </div> <ul style="list-style-type: none"> <li>◦ <b>Key column</b> supports Text-based data types and following numeric-based data types: <code>SMALLINT</code>, <code>INT</code>, and <code>INTEGER</code>. The column should be a primary key to avoid duplicates. Using a column containing duplicates results in unexpected behavior when retrieving values.</li> <li>◦ If you have used a lookup table key-value pair at offer template level or offer level, do not delete these rows from the lookup table. If you delete the key-value pair from the lookup table, the system may not work as expected in all the cases.</li> </ul> <ul style="list-style-type: none"> <li>• <b>Display column</b> - Lists all the columns of the selected table.</li> </ul> <div data-bbox="581 810 623 863" data-label="Image"> </div> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>◦ Display column supports the following text-based data types: <code>VARCHAR</code>, <code>NVARCHAR</code>, <code>CHAR</code>, <code>TINYTEXT</code>, <code>TEXT</code>, and <code>MEDIUMTEXT</code>.</li> <li>◦ Display column supports the following numeric-based data types: <code>SMALLINT</code>, <code>INT</code>, <code>INTEGER</code>, <code>DOUBLE</code>, and <code>FLOAT</code>.</li> <li>◦ Display column supports the following date-based data types: <code>DATE</code> and <code>TIMESTAMP</code>. The dates will appear as per UTC time zone.</li> </ul> <ul style="list-style-type: none"> <li>• <b>Sort by column</b> - Lists all the columns of the selected table.</li> </ul> <div data-bbox="581 1272 623 1325" data-label="Image"> </div> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>◦ If your database does not support a particular data type for sorting, avoid using that data type. For example, <code>LONG</code></li> <li>◦ Sort by column supports the following text-based data types: <code>VARCHAR</code>, <code>NVARCHAR</code>, <code>CHAR</code>, <code>TINYTEXT</code>, <code>TEXT</code>, and <code>MEDIUMTEXT</code>.</li> <li>◦ Sort by column supports the following numeric-based data types: <code>SMALLINT</code>, <code>INT</code>, <code>INTEGER</code>, <code>DOUBLE</code>, and <code>FLOAT</code>.</li> <li>◦ Sort by column supports the following date-based data types: <code>DATE</code> and <code>TIMESTAMP</code>.</li> </ul> <ul style="list-style-type: none"> <li>• <b>Sort order</b> - The order for sorting. Available options are <code>Ascending</code> and <code>Descending</code>.</li> </ul> <p>The following field is optional:</p>

**Table 2. Fields in Add Attribute Details Page (continued)**

Field Name	Description
	<p>• <b>Default values for the field -</b></p> <p> <b>Note:</b> Attribute values at template level and offer level has the same upper limit as that of Centralized Offer Management attributes.</p>
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	<p>You can use the Boolean attribute type to select or deselect a checkbox (for example true or false) for the attribute.</p> <p> <b>Note:</b> Currently the systems leveraging Centralized Offer Management treats the Boolean attribute as numeric with possible values of 0 or 1. Here, 0 means <code>FALSE</code> and 1 means <code>TRUE</code>. So, if you are parameterizing the Boolean attribute, or exporting the attribute, it will be represented as 0 or 1.</p>
Form element type Picker - URL	<p>You can define the attribute of type URL. When integrated with Unica Content Integration, you can configure a URL for searching content from target content management system. For more information see <i>Unica Content Integration Installation and Configuration Guide</i>.</p> <p>If you have hosted Unica on an SSL setup (<code>https</code>) and the CMS is on a non-SSL setup (<code>http</code>), the thumbnails for the images might not appear. You have to configure your browser to view the thumbnail of the content. For more information on configuring the browser, see <a href="#">Browser configurations if CMS is hosted on non-SSL setup on page 47</a>.</p>
Form element type Text field - Rich text	<p>This element type attribute does not support Engage integration. You can use the Rich text attribute to write and format content. The Rich text attribute provides an editor containing the following formatting options:</p> <ul style="list-style-type: none"> <li>• Bold</li> <li>• Italics</li> <li>• Underline</li> <li>• Strikethrough</li> <li>• Font size</li> <li>• Font color</li> <li>• Background color</li> <li>• Paragraph formatting</li> <li>• Ordered list</li> </ul>

**Table 2. Fields in Add Attribute Details Page (continued)**

Field Name	Description
	<ul style="list-style-type: none"> <li>• Unordered list</li> <li>• Inserting a hyperlink</li> <li>• Inserting a table</li> </ul> <p> <b>Note:</b></p> <ul style="list-style-type: none"> <li>• Rich text attribute is supported only in internal attributes and static attributes section.</li> <li>• The tooltip for font color and background color does not support localization. This is a limitation in the editor.</li> <li>• Within the rich text editor, copying formatted text from an external source and pasting it to the editor is supported. However, sometimes, the formatting may not be retained during the copy-paste. In such cases, you can reapply the formatting.</li> <li>• Microsoft Internet Explorer users cannot access the hyperlink due to limitations in Internet Explorer. Google Chrome users can access the hyperlink by right-clicking the hyperlink and opening it in a new tab, new window, or in incognito mode.</li> </ul>
Mandatory	<p>If you want to require a value for this attribute, select Mandatory. This setting has the following result:</p> <ul style="list-style-type: none"> <li>• 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.</li> </ul> <p>If you change this option after an attribute is in use:</p> <ul style="list-style-type: none"> <li>• If you change from mandatory to non-mandatory, a value is no longer required when the attribute is used.</li> <li>• 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.</li> </ul>

## 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.

## Browser configurations if CMS is hosted on non-SSL setup

If you have hosted Unica on an SSL setup (`https`) and the CMS is on a non-SSL setup (`http`), the thumbnails for the images might not appear. You have to configure your browser to view the thumbnail of the content.

### Configurations for Google Chrome

#### About this task

To view thumbnails of content if the CMS is hosted on a non-SSL setup, perform the following configurations on Google Chrome:

1. On the address bar of the browser, select the **Not secure** area preceding the URL.

#### Result

A panel appears.

2. Select **Site settings**.
3. Within **Permissions**, change the value of the **Insecure content** field from `Block (default)` to `Allow`.
4. Refresh the page after saving the settings.