

This guide explains how to install a custom report in PACE to extract the contacts for recent transactions, and have that report automatically emailed to LoyaltyLoop. We recommend having your <u>LoyaltyLoop</u> <u>Launch File Email Address</u> handy before proceeding with this guide.

Requirements

There are 3 requirements to utilize the PACE Automation for LoyaltyLoop.

- 1. You must have the PACE Custom Reports module. See <u>Appendix</u> for details.
- 2. You must be signed into PACE with an Administrator Account. See Appendix for details.
- 3. You must have the LoyaltyLoop PACE Custom Report saved someplace accessible to the computer running PACE.

Get the LoyaltyLoop-PACE Custom Report from our <u>PACE Automation page</u> or from LoyaltyLoop Support (<u>support@loyaltyloop.com</u>). The report captures the last 30 days of PACE transactions and associated Job Contacts based on the PACE invoice Posted Date. You do not need to worry about the same transactions appearing in subsequent reports. LoyaltyLoop automatically applies filters to avoid overtouching the same contact email address. This enables you to instruct LoyaltyLoop to launch your surveys as frequently as daily, weekly (recommended), or as infrequently as monthly, with the confidence of knowing the same contact (email address) will not be surveyed repeatedly.

1. Adding the Custom Report to PACE

Click Administration/System Setup, then Report Files





Then, click Add

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	Estimating	Report Files
▣	Price List Quoting	Update Add Search Name - Search Find
ы	Production	
3	Scheduling	Name
8	Accounting	-D :
ଞ	CRM	-∃:

Next, click Choose Files and select the LoyaltyLoop Custom Report you saved on your PACE computer. Give the file the exact name of the file name (copy/paste), then click Add.

0			Job
	Estimating	Report File : New ReportFile	
▣	Price List Quoting	Add	
۲	Production	Report File Details	
\$	Scheduling	Name	
8	Accounting	Report File Choose Figs No file chosen	
ප	CRM	EFI Owned 🗌 Active 🗹	
0	PaceStation	Notes	
₽	Universal Importer		
e,	Administration		



On the confirmation screen, click Update, and the Custom Report will be added to PACE.

0			Job
	Estimating	Report File : LoyaltyLoop.rpt	
▣	Price List Quoting	Update Delete :	
Ы	Production		
\$	Scheduling	Report File Details Report File Usage	
8	Accounting	Name LoyaltyLoop.rpt	
ත	CRM	Report File LoyaltyLoop.rpt 🔁 🧟 😒 🗄	

2. Configure PACE to run the Custom Report (i.e. set the report front end) Click Administration/System Setup, then Reports

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	Estimating	Administration			/
II	Price List Quoting	Contacts	Company Settings	Security Settings	Report Settings
-		System Setup	Company Setup	System Users	Reports
Ш	Production	Connect Center >	View Companies	System Groups	Report Files
0	Schoduling	Customization >	Legal Entities	Security Filter Types	Report Packages
9	scheduling	Customication	Manufacturing Locations	Export Permissions	Report Version Categories
\otimes	Accounting	System Information & Licensing	Status Types	System User Audit Report	Report Categories
-		Launch Dashboard	Expression Settings	Tags	Fonts
ഭ	CRM	Laurah afan ini	Expression Categories	Tags	Printers
		Launch eservice	Expressions	Tag Categories	Report Settings
0	PaceStation	Launch Mobile	Files and Attachments	User Translations	
Ē	Universal Importer	System Tools >	Attachment Settings	I18n Bundles	
· ·		Web Sites >	Attachment Categories	Export Translations	
8	Administration		Content Files	Import Translations	
			Content File Categories	HOM Seminar	
ÎţÎ	Module Setup		Lacola Cattings	Unix of Managers Cattlene	
	Search Manu		Locale Secongs	Unit of Measure Settings	
-4	Search Menu		Country Maintenance	UOM Dimension Settings	



Next, click Add New Report

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	Estimating	Reports			
▣	Price List Quoting	Update Add New Report Search Category Search Find			
Ш	Production				
\$	Scheduling	□ Category http://www.setarcondensetar			
8	Accounting	Display Name Name Description	n		
ଞ	CRM	1096 IRS Summary Form accountspayable/1096-form.rpt 1096 IRS S	Summary Form		
0	PaceStation				

Click the picker icon next to the Name field, and then find/select the LoyaltyLoop.rpt report file (or the filename as specified by LoyaltyLoop Support). Add it to the Accounts Receivable Module (or another location of your choosing), give it a friendly display name like "LoyaltyLoop Report", set the Export Type to XLS, then click Add. The report front end is now added, and you can run the report.

0				Job 🗸 Search 🔍
	Estimating	Report : New Report		
▣	Price List Quoting	Add Add / Add	l New 🗄	
Ь	Production	Report Information	Parameters Configure Email Arch	ive Report Versions
3	Scheduling	VOTE: forced fie	lds are checked when the field is edited. To manu	ally un-force the field uncheck the corresponding attribute on this tab. Forced fields will remain in the event of
8	Accounting	😨 reportType-Not	Available	
ଞ	CRM	ID		Base Object
0	PaceStation	Category	General	· + /
Ţ	Universal Importer	Module		•
e.	Administration	Name	LoyaltyLoop.rpt	Custom Report File
† \$†	Module Setup	Display Name	Loyalty Loop Report	
lä	Search Menu	Description		0
		Export Name XPath		
		Report Size	Letter 🖻 :	Report Orientation Portrait
		Export Type	XLS 👻 🗹	Prompt Export
		Crystal Clear Version	19.2 *	Prompt Crystal Clear Version
		Data Preparer	* 🖸	Show Logo
		Default Report Printer	• 🔁 :	Allow Refresh 🔽 🗌



To run the report manually and preview the results, go to Accounting/Receivables, and click LoyaltyLoop Report under the General section. If you save the LoyaltyLoop Report someplace else, navigate to that location and click the report.





3. Set the Scheduled Task to run and email the report automatically Click Administration/Customization, then click Scheduled Tasks from the Events & Notifications section.

0				
	Estimating	Administration		
	Price List Quoting Production Scheduling Accounting CRM PaceStation	Contacts System Setup > Connect Center > Customization > System Information & Licensing > Launch Dashboard > Launch Mobile > System Tools >	Object Model Object Model Browser Object Model Browser (Standard) User Defined Objects User Defined Fields User Defined Lists User Defined Views External Data Sources User Interface User Defined Forms	Configure Email Archive inually un-force the field uncheck t Base Object
 & †\$†	Administration Module Setup	Web Sites >	User Defined Includable Forms User Defined Object Contexts User Defined Menu User Interface Sets	Custom Re
lä	Search Menu		Events & Notifications Event Handlers Scheduled Tasks Email Template Categories Email Templates RSS Channels Twitter Accounts Facebook Accounts	Report



Click Add New

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	Estimating	Scheduled Tasks Repently Executed ~	
▣	Price List Quoting		
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3	Scheduling	Name	Last Execution Last Run ID Status
8	Accounting	Notify Department Manager When Employee Not Signed Out	229,005 Success
ഭ	CRM	EFlow Connectivity Retry	398,027 Success
0	PaceStation	E : Check system warnings	284,905 Success
Ţ	Universal Importer	Reset Inventory Item Qty Allocated Field	315,838 Success
		Reset Customer WIP Field	315,838 Success
20	Administration	PaceConnect.Auto License Renew Connect(1).[Results HouseKeeper]	342,979 Success
† I†	Module Setup		

Now give the Scheduled Task a Name, set the Type of task to be Report, and then click the drop-down menu next to the Report section to find/select the LoyaltyLoop report, then click Add.

				Job	 Searc
	Estimating	Scheduled Task : New ScheduledTask			
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Ы	Production	Scheduled Task			
\$	Scheduling	Name Loyalty Loop Report			
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8	CRM	Base Object			
0	PaceStation	Report Loyalty Loop Report - 10045 × +	1 1		
Ţ	Universal Importer	System User Administrator 🗄 🖶 🗄	Active 🗹		
0	Administration				



In the Schedule section enter today as the start date, and set end date to the last day PACE permits.

Then, click Add in the Recurrence Definitions section. In the pop-up, choose the Type of recurrence that is right for your business and then click Update. The Recurrence you set will be when you want your surveys to be sent. We recommend setting Recurrence to Weekly. Enter the integer for the hour you want the report to run, then set the Day of Week to Monday.

If you set the Recurrence to Weekly on Monday, the report is emailed to LoyaltyLoop every Monday, and your survey will be sent on Tuesday. If you prefer to send surveys daily, then set the Recurrence to Daily. Your report will be emailed to LoyaltyLoop daily and your survey will be sent on the next available launch day (Tuesday, Wednesday or Thursday).





Now let's set up the email that will be sent automatically per your settings in the prior step, with your Custom Report in XLS format attached.

Click Outputs, then go to the Email Message Definitions and click Add New Output. In the pop-up, select the Default Email template (or LoyaltyLoop Email template if one exists), then click Add.

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Accou	ounting	Add New Output		
CRM		Name ≟↑ Type		Por
O Paces	Station		Scheduled Task Output Email Message Definition	
Unive	ersal Importer		Email Template Default Email X	
<i>₽</i> ₀ Admi	inistration	Printer Definitions	Email Priority Normal X *	
해 Modu	ule Setup	Add New Output	Result Condition Success	
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		Email Message Definitions		
		Add New Output	-	
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			There's nothing here yet.	



Next, click Add New Email Recipient.

Set the Recipient Type to Manual, and confirm the Recipient Address Type is set to TO, then click Add.

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Active			Save Sent Email		0	
Add New Email	Recipient			Add / Add New		
				Recipient	Ires	s Type Recipient
				Recipient Type Manual +		
				Address Type		
				Company Email		
				System Generated		



Capturing feedback. Driving results.

On the next pop-up, set the Type to Email, and enter your LoyaltyLoop Launch File Email Address **surrounded by double-quotes**, then click Update, then Add on the pop-up window beneath.

🐠 Email Message Definit	ion - 5001 - Google Chrome	+ al octopus	-
Update Duplic	ate Delete	n	
Email Template	Default Email Templa X +		
Email Priority	Normal X *		1
Result Condition	Success 👻	er/ Adding Email Recipient - Google Chrome – 🗌 🗙	
Active Add New Email	Recipient	Re Uddate Close Valid Expression 0.007 sec Company Picase select a value Type Email • *Leunch+ LoyaltyLoop Launch File Email Address surrounded by double=quotes	ress Type Recipient

Hit the Update button on the next screen, and you should see your LoyaltyLoop Launch File Email Address is set as the recipient.

of Email Message Definition - 5001 - Google Chrome		++ all oct		
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Scheduled Task Output Email Message Definition				
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Add New Email Recipient				
Recipient Address Type		Recipient		
-∄ ; то		your LoyaltyLoop Launch File Email Address should be here		



Click Update on the next screen. You're done! Your LoyaltyLoop PACE report is now scheduled to run automatically and email your data to your us at your LoyaltyLoop Launch File Email Address. Congratulations!

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	Schedule				
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	End Date 08/30/2044 🟥	End Time	l≩.		
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APPENDIX

Confirming if you are signed in as the PACE Administrator, and you have the Custom Report Module.

Go to Administration/System Information & Licensing...

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O PaceStation	Launch eservice	Results		
	System Tools			Total Records: 0
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...click Customization Licenses...

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	Price List Quoting						
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(5) Scheduling	License Info System info Core Licenses Mobile Licenses Customization Licenses Add On Licen	nses Pace Connect Licenses Generate Access Code /License End User License Agreement				
0	Accounting	Company Name					
8	CRM	Licensee					
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Ţ	Universal Importer	Expiration 10/06/2023 7:11 PM					
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If you can see this Customization Licenses tab and details, you are signed in as the PACE Administrator.

Look for the Custom Reports and you should see a "YES" or checkbox, indicating the module is part of your PACE system. If you do not see the Custom Reports module, please contact PACE Support before proceeding with this guide.

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	Estimating		Log Off Users Update License Key Reconnect eFlow License Manager Update Licenses Cenerate Access Code Cenerate & Update Access Code View Companies					
	Price List Quoting							
Pro	Production	9	▲ Falled To Retrieve Eflow LIMLicenses					
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8	Accounting				Licenced	Total Records: 14		
ත	CRM		License Expire	ation Date	(all)			
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Ţ	Universal Importer		Connectivity Toolkit	8	0 /			
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414		1	Custom Reports					
101	Module Setup	1	CVERTS AND YOURGEDORS		-			
lä	Search Menu		Facebook	-	0			
			RSS Feeds	8	0			
			Twitter	8	0			
			User Defined Defaults	8	0			
			User Defined Fields	8	0			
			User Defined Forms	6	0			
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			User Defined Objects	8	0			
			User Defined Views	8	0			
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