

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 [LoyaltyLoop Launch File Email Address](#) handy before proceeding with this guide.

Requirements

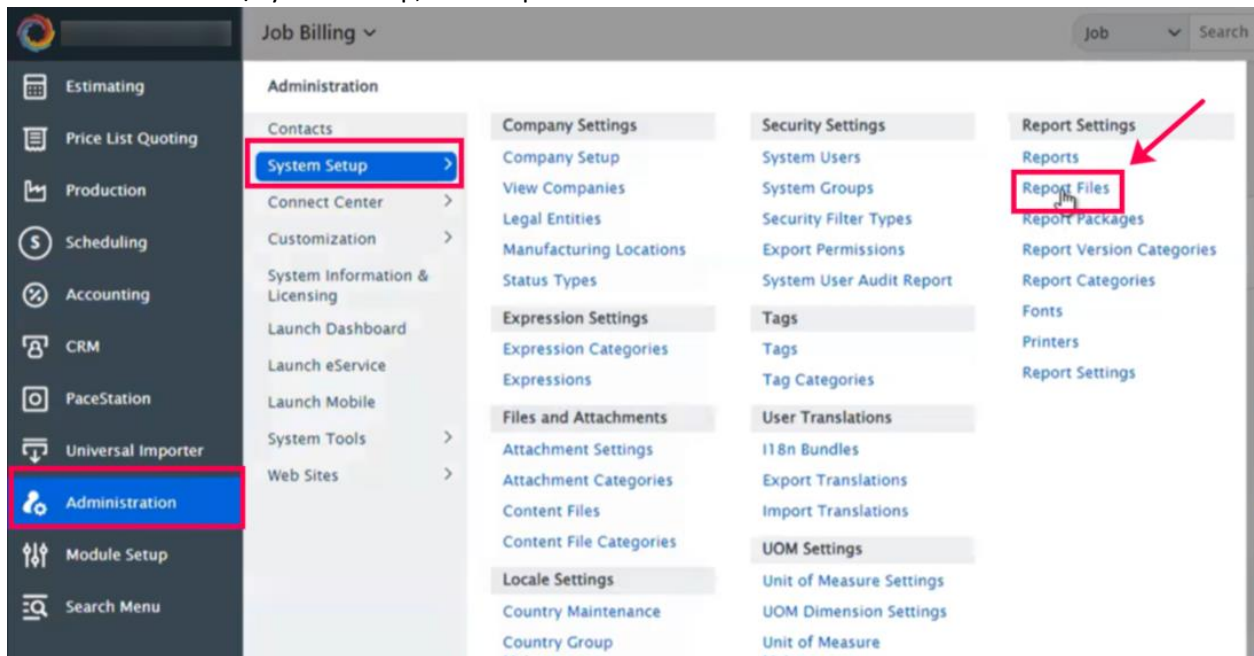
There are 3 requirements to utilize the PACE Automation for LoyaltyLoop.

1. You must have the PACE Custom Reports module. See [Appendix](#) 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.

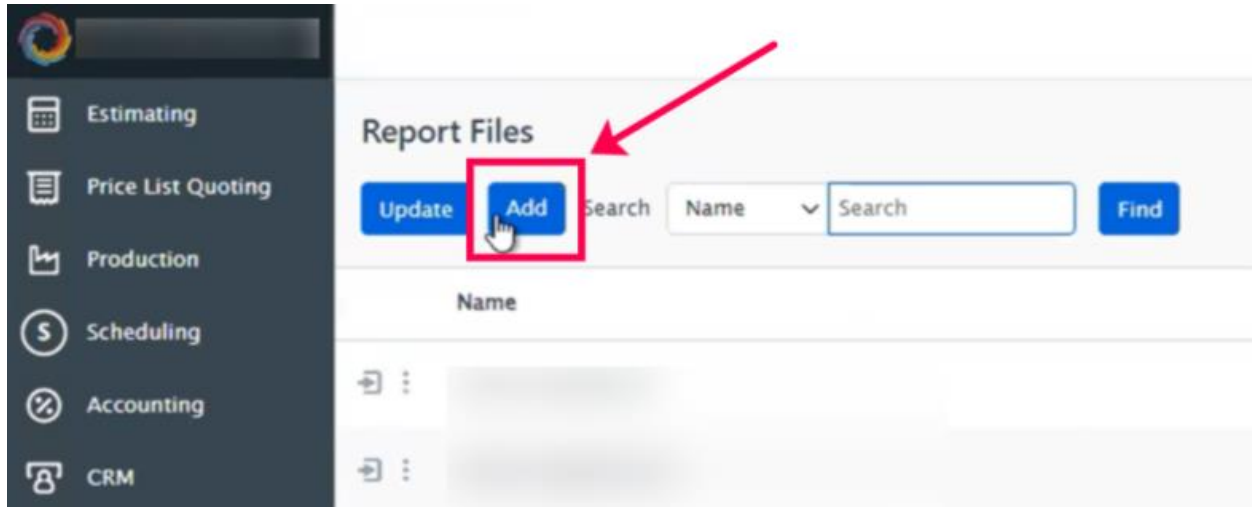
Get the LoyaltyLoop-PACE Custom Report from our [PACE Automation page](#) or from LoyaltyLoop Support (support@loyaltyloop.com). The report captures the last 30 days of PACE transactions and associated Job Contacts based on the PACE invoice Posted Date. You do not need to worry about the same transactions appearing in subsequent reports. LoyaltyLoop automatically applies filters to avoid over-touching 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

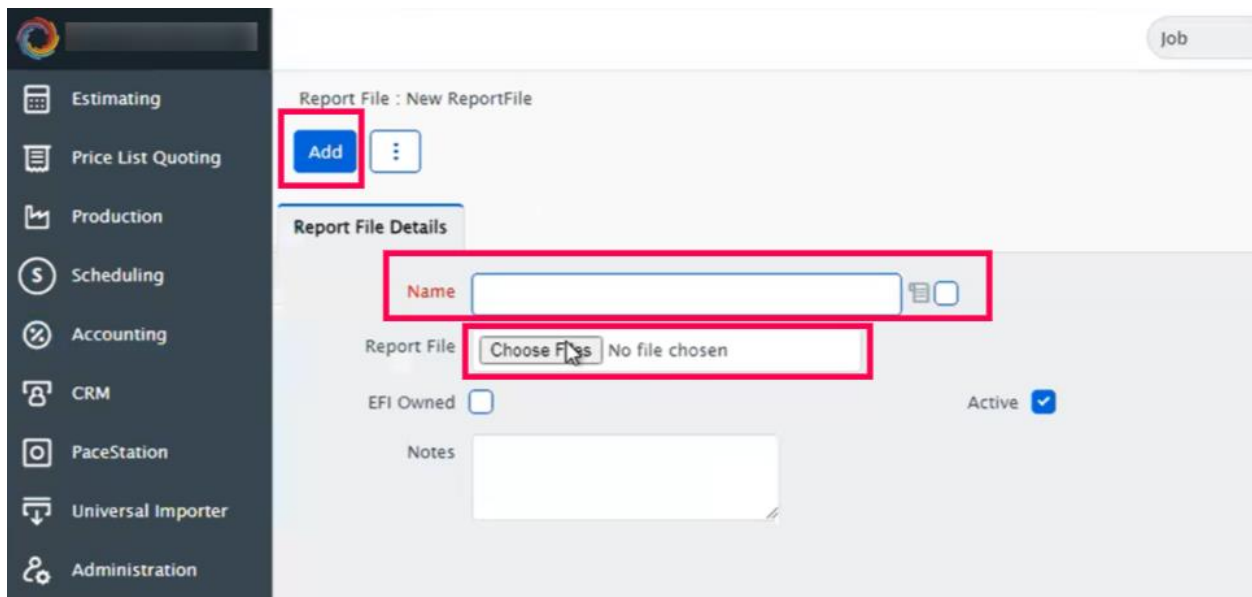
Click Administration/System Setup, then Report Files



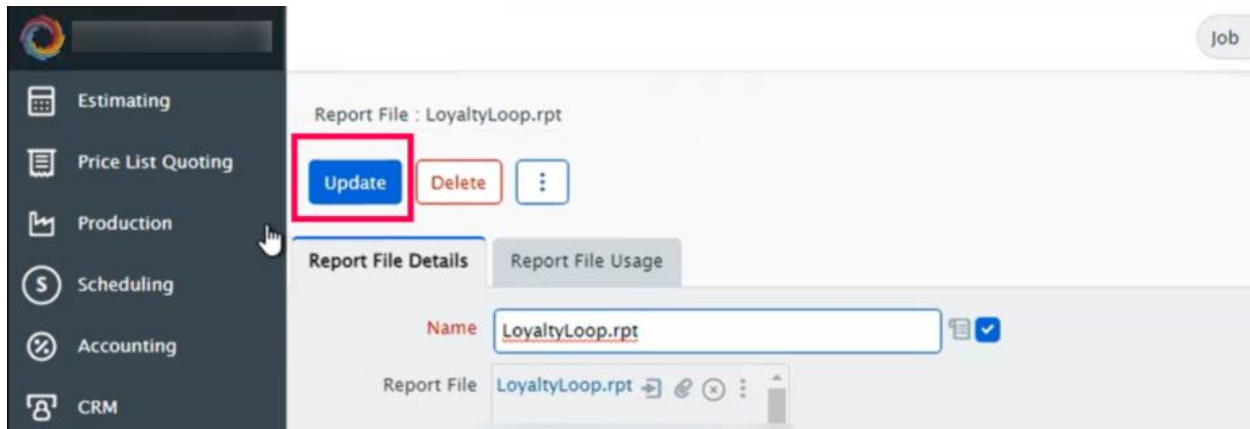
Then, click Add



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.

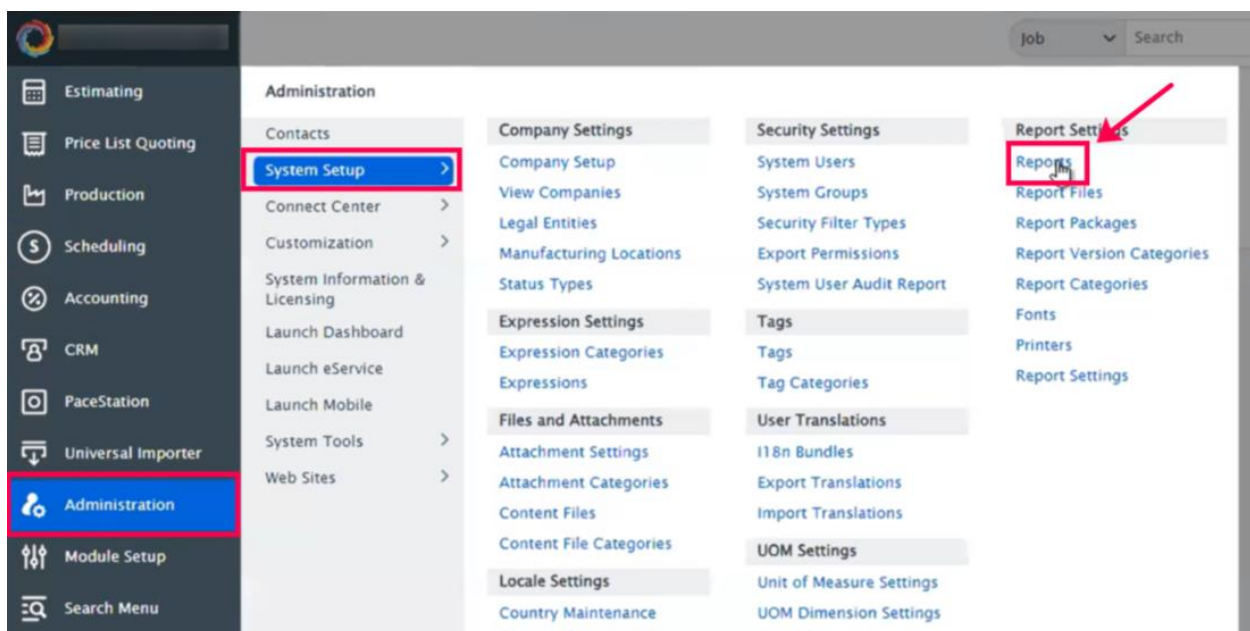


On the confirmation screen, click Update, and the Custom Report will be added to PACE.

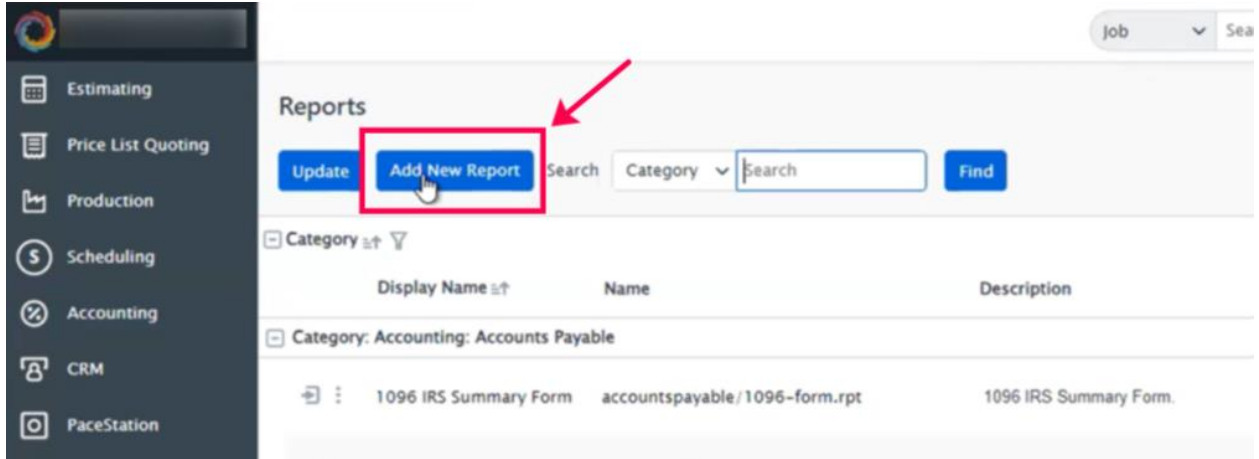


2. Configure PACE to run the Custom Report (i.e. set the report front end)

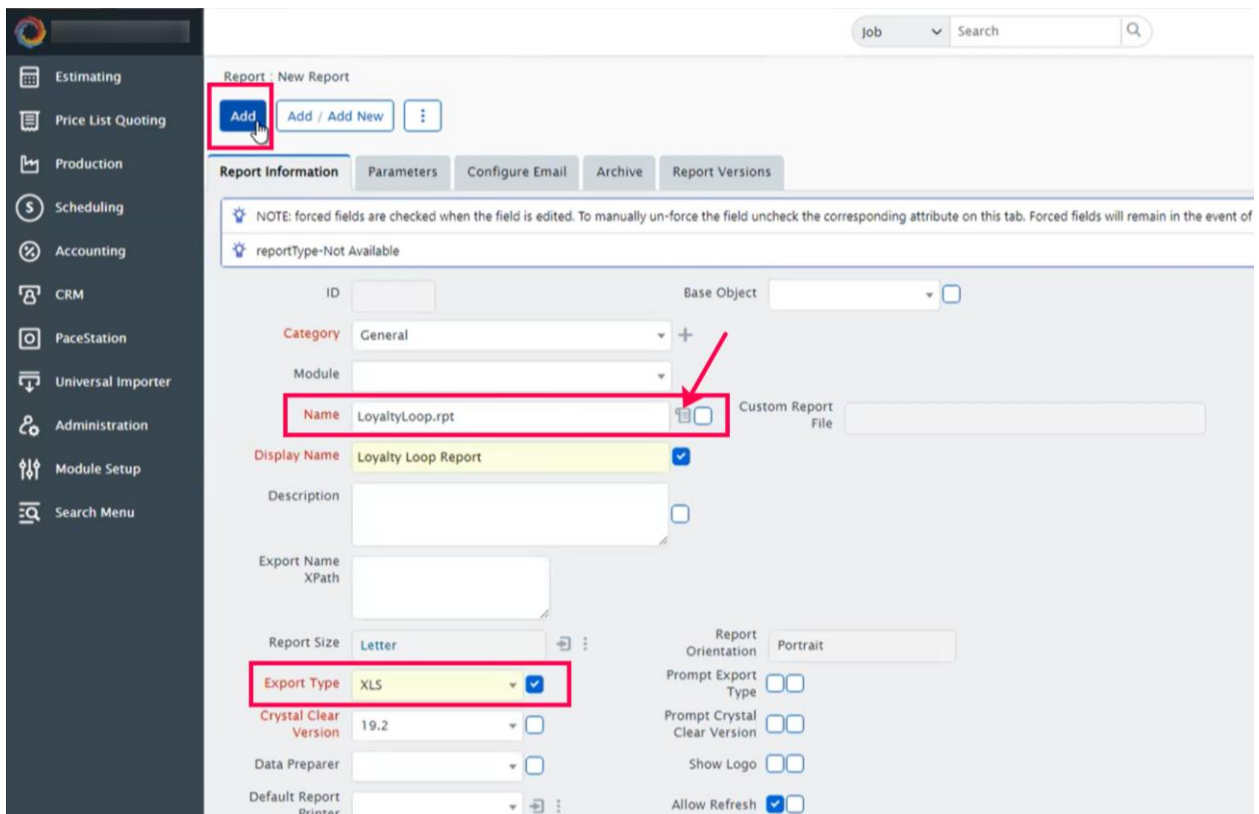
Click Administration/System Setup, then Reports



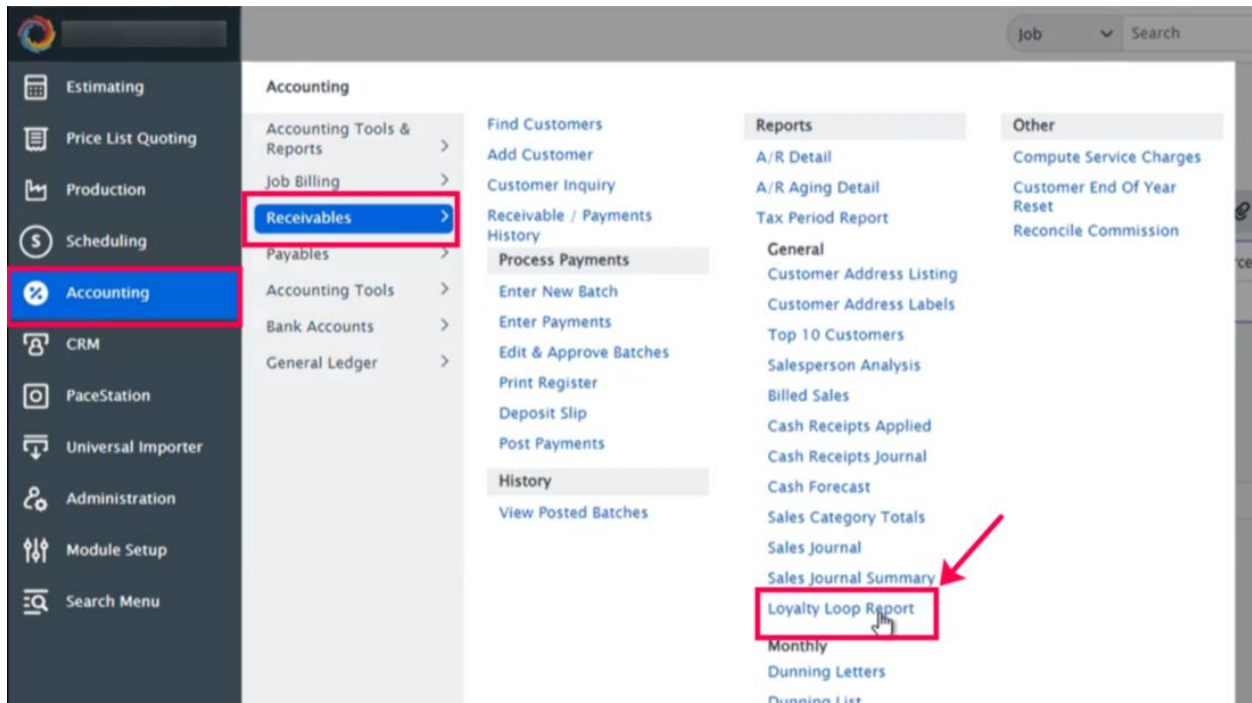
Next, click Add New Report



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.

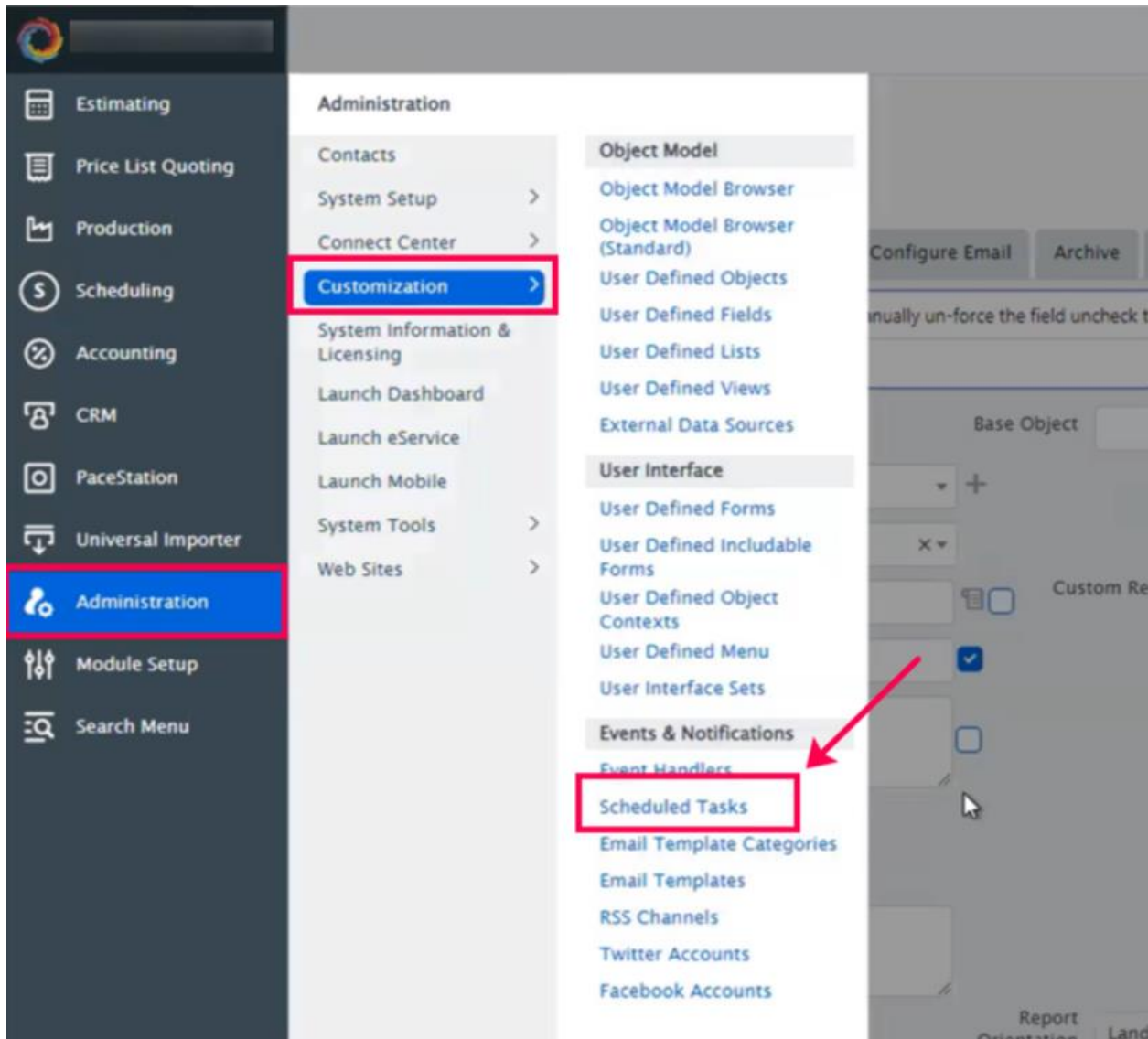


To run the report manually and preview the results, go to Accounting/Receivables, and click LoyaltyLoop Report under the General section. If you save the LoyaltyLoop Report someplace else, navigate to that location and click the report.

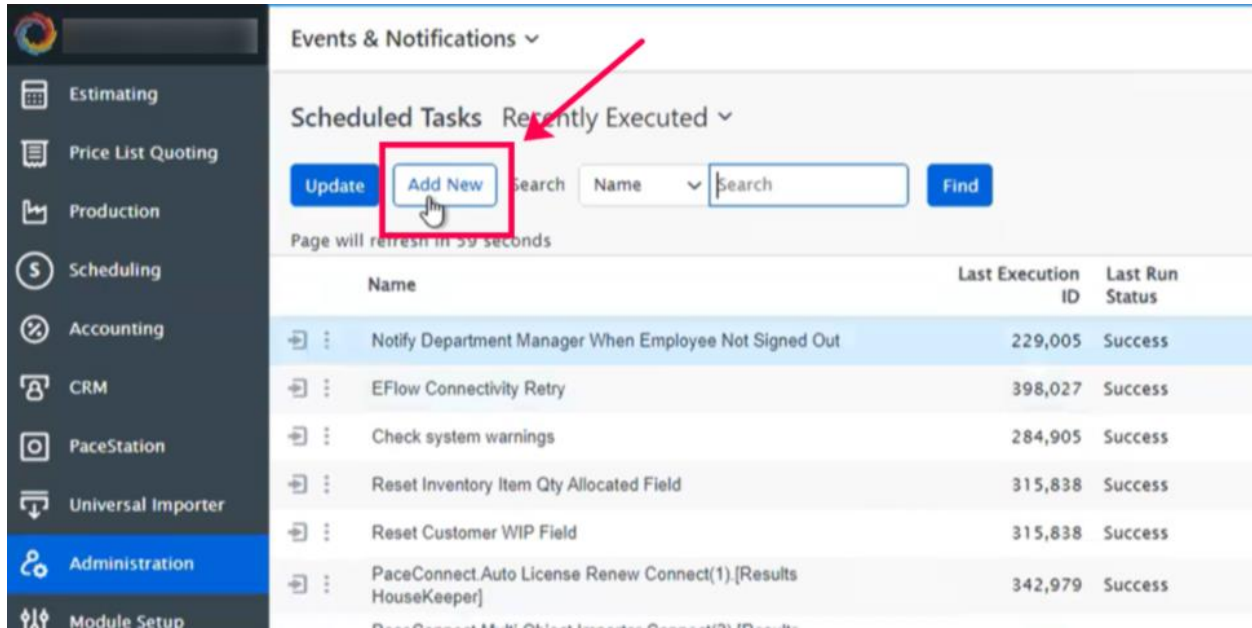


3. Set the Scheduled Task to run and email the report automatically

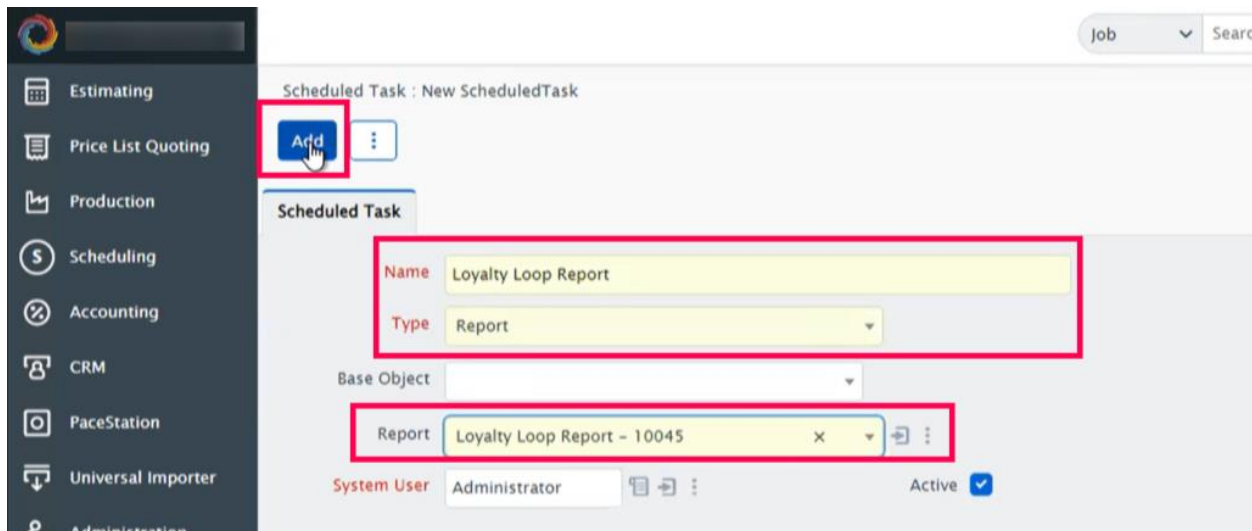
Click Administration/Customization, then click Scheduled Tasks from the Events & Notifications section.



Click Add New



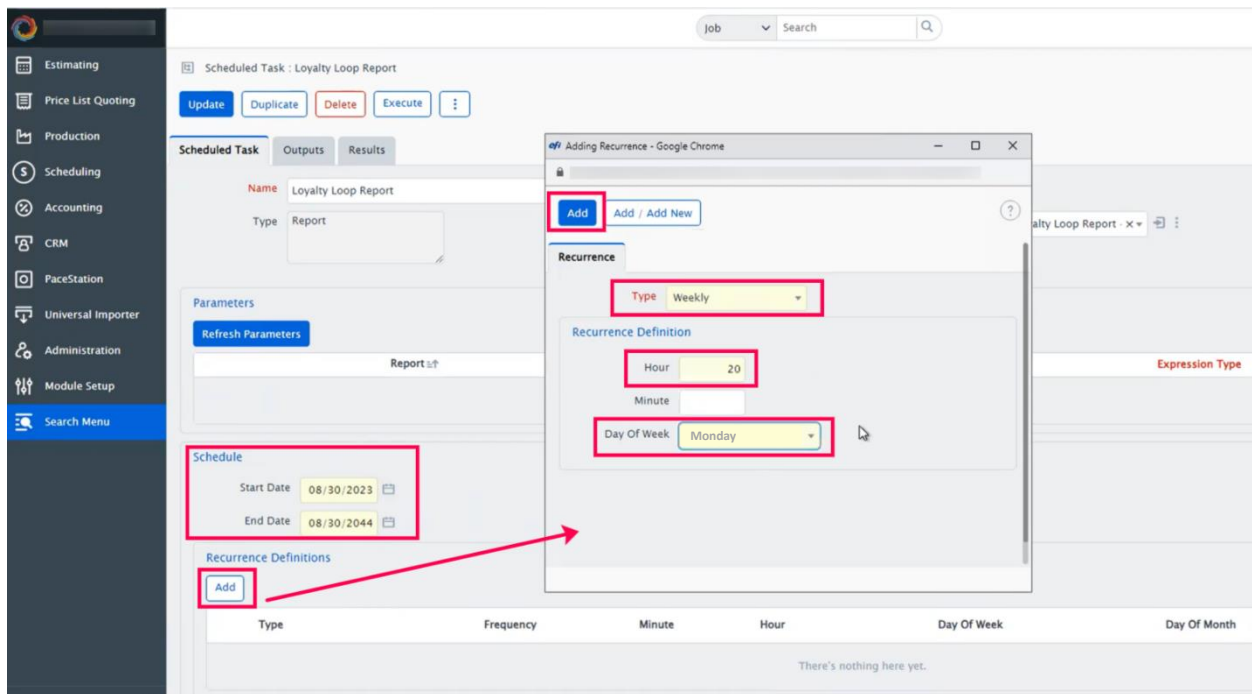
Now give the Scheduled Task a Name, set the Type of task to be Report, and then click the drop-down menu next to the Report section to find/select the LoyaltyLoop report, then click Add.



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

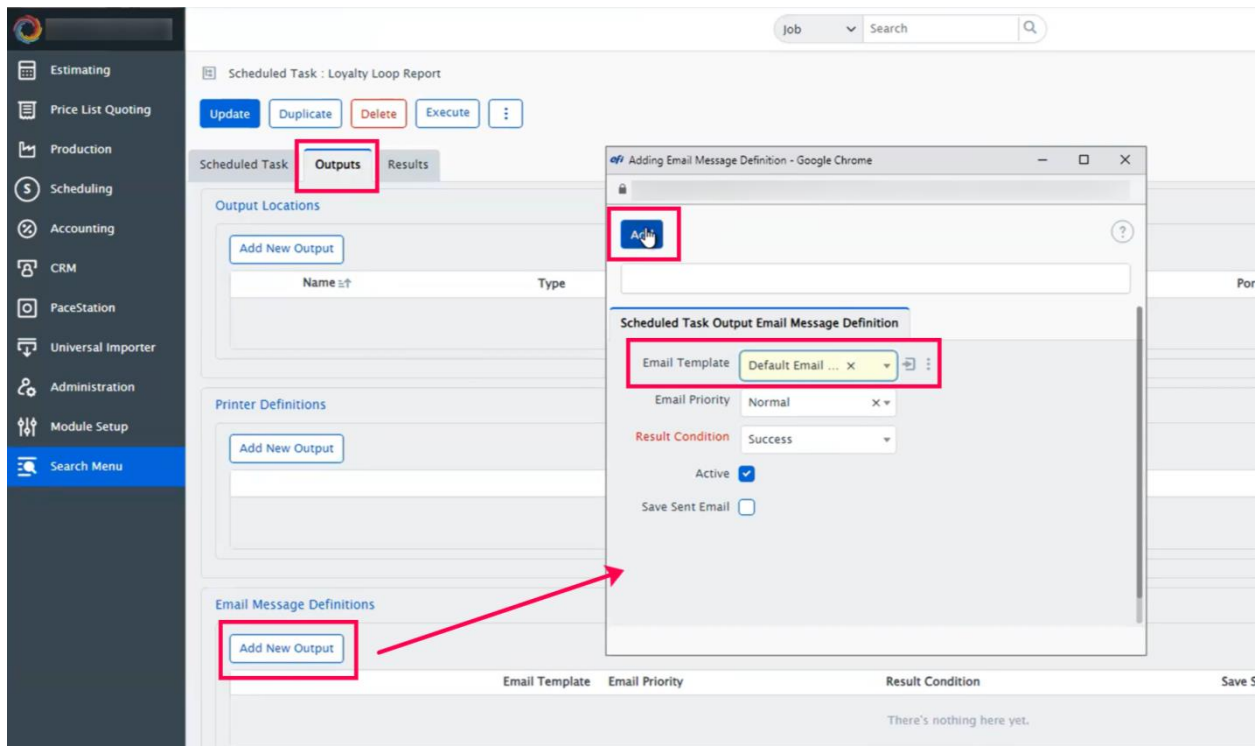
Then, click Add in the Recurrence Definitions section. In the pop-up, choose the Type of recurrence that is right for your business and then click Update. The Recurrence you set will be when you want your surveys to be sent. We recommend setting Recurrence to Weekly. Enter the integer for the hour you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



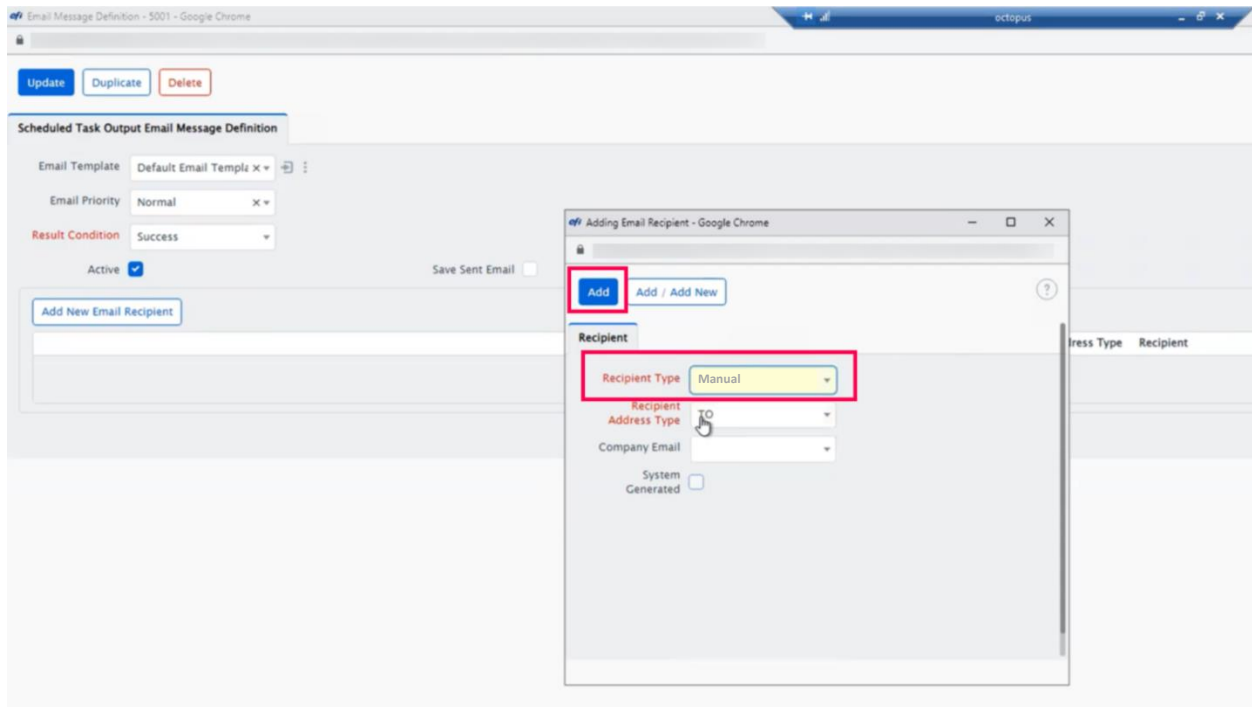
Now let's set up the email that will be sent automatically per your settings in the prior step, with your Custom Report in XLS format attached.

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.

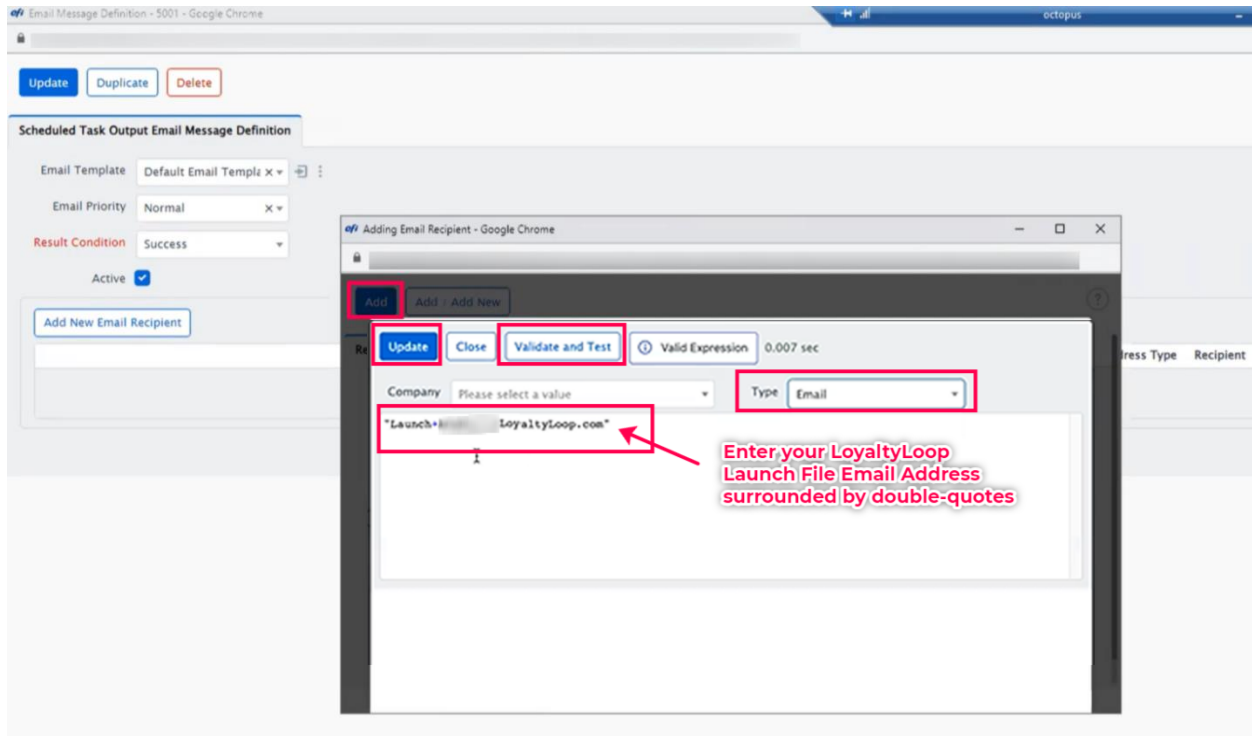


Next, click Add New Email Recipient.

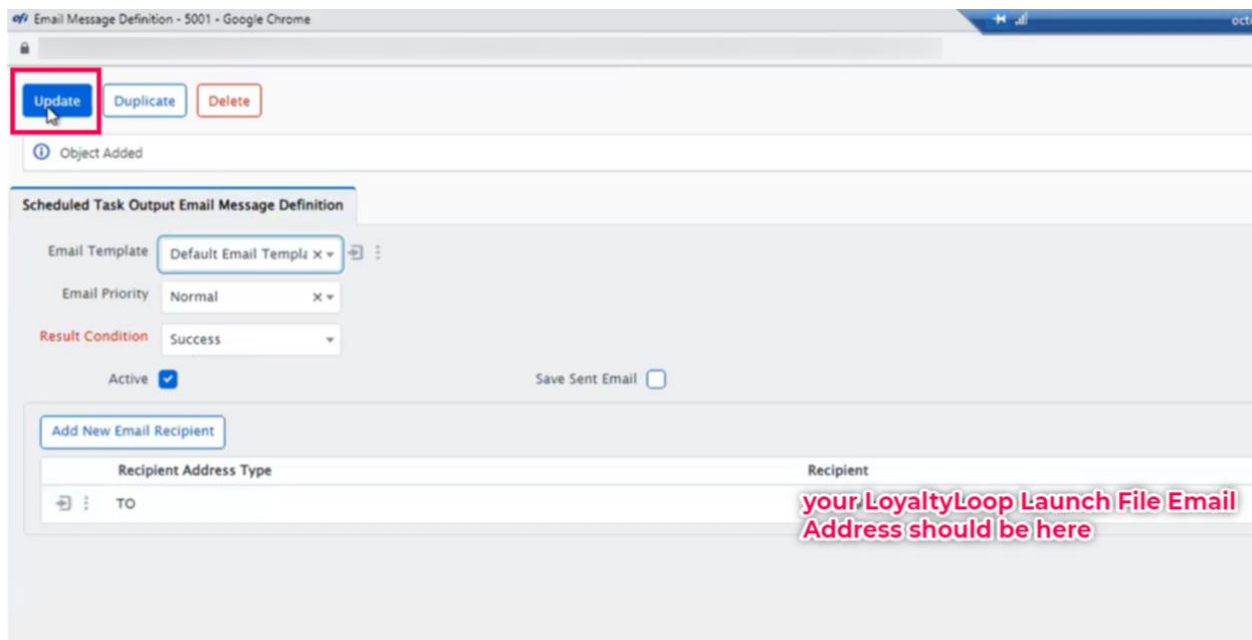
Set the Recipient Type to Manual, and confirm the Recipient Address Type is set to TO, then click Add.



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.



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



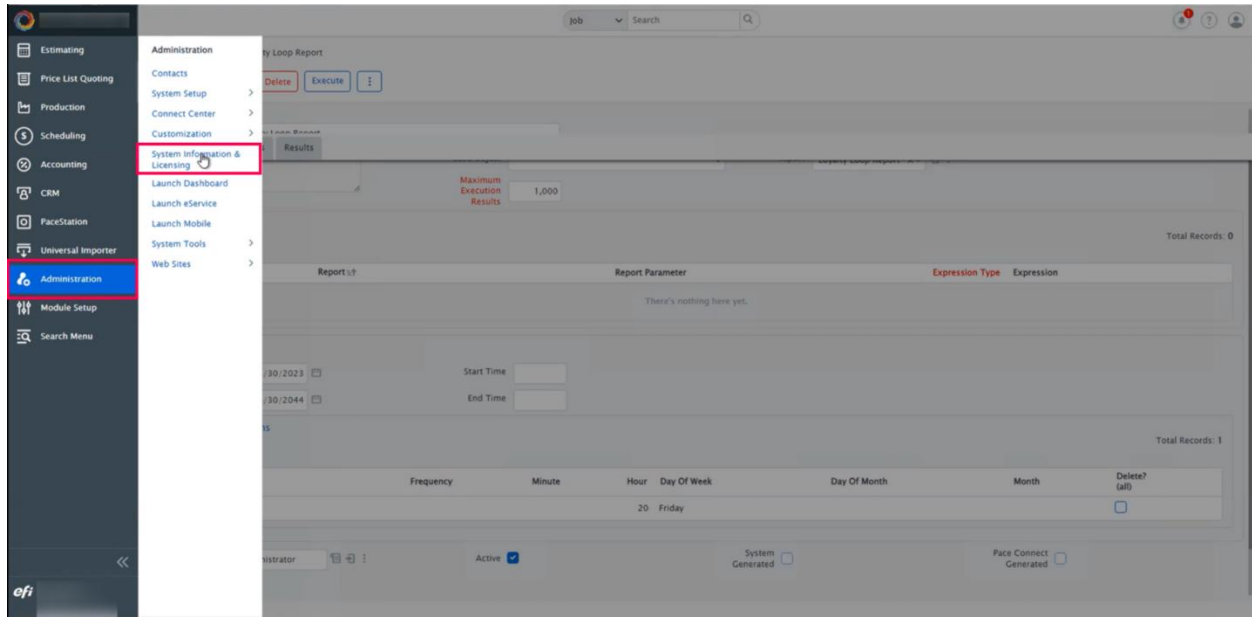
Click Update on the next screen. You're done! Your LoyaltyLoop PACE report is now scheduled to run automatically and email your data to your us at your LoyaltyLoop Launch File Email Address. Congratulations!

The screenshot displays the 'Scheduled Task: Loyalty Loop Report' configuration page. At the top, there are buttons for 'Update', 'Duplicate', 'Delete', and 'Execute'. The 'Update' button is highlighted with a red box. Below these buttons, the 'Scheduled Task' section shows the task name 'Loyalty Loop Report', type 'Report', and a maximum execution result of 1,000. The 'Parameters' section is currently empty, with a 'Refresh Parameters' button and a message 'There's nothing here yet.'. The 'Schedule' section shows a start date of 08/30/2023 and an end date of 08/30/2044. The 'Recurrence Definitions' section contains one entry: 'Weekly' with a frequency of 20 and a day of Friday. The bottom of the page shows system user information: 'System User Administrator', 'Active' (checked), 'System Generated' (unchecked), and 'Face Connect Generated' (unchecked).

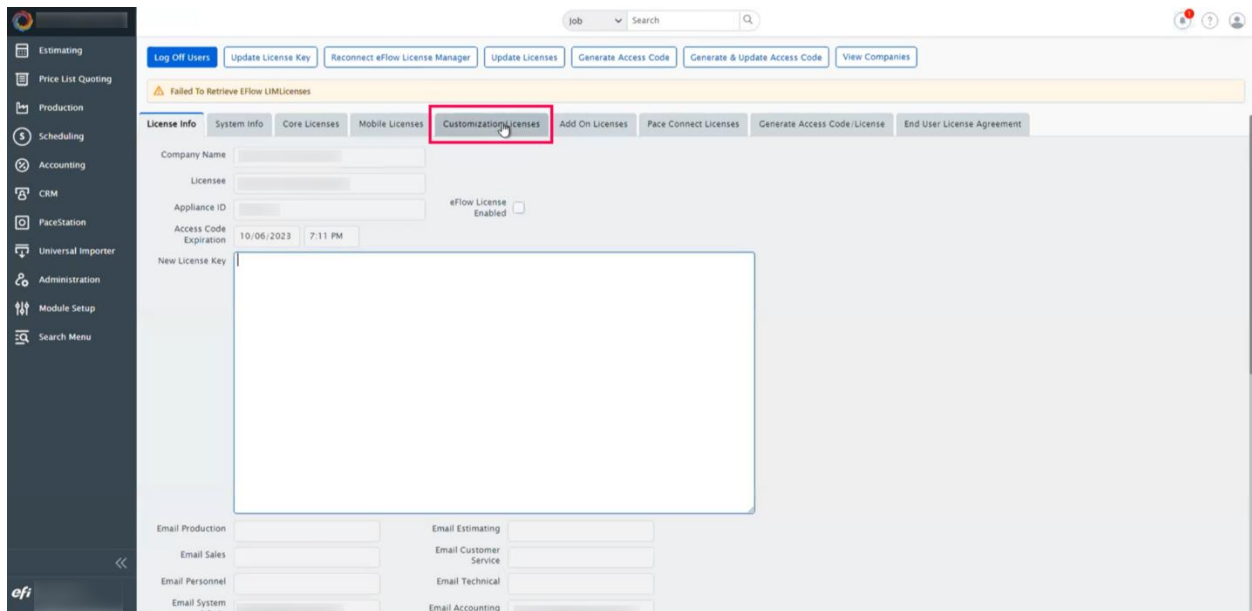
APPENDIX

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

Go to Administration/System Information & Licensing...



...click Customization Licenses...



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.

