Oracle Loyalty Cloud

Administering Loyalty

21D

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21D
Part Number F46005-01

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Contents

Preface

This preface introduces information sources that can help you use the application.

Using Oracle Applications

Help

Use help icons ? to access help in the application. If you don't see any help icons on your page, click your user image or name in the global header and select **Show Help Icons**. Not all pages have help icons.

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Watch: This video tutorial shows you how to find and use help.

You can also read about it instead.

Additional Resources

- **Community:** Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.
- **Training:** Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

Convention	Meaning
boldface	Boldface type indicates user interface elements, navigation paths, or values you enter or select.
`monospace`	Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.
>	Greater than symbol separates elements in a navigation path.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website.

Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.

Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we're working to remove insensitive terms from our products and documentation. We're also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

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1 About This Guide

Audience and Scope

If you administer or manage loyalty programs, this guide is for you. Use it to learn how to set up and maintain loyalty programs, members, and promotions.

Your customers enroll in loyalty programs to earn rewards. Loyalty promotions determine those rewards. For example, program members might earn points when they make purchases or refer other customers.

It's a good idea to create various tier levels for members, giving them incentives to earn products and services, including those from redemption partners.

You will also learn about ongoing tasks:

- Adding and maintaining member records, both individually and in groups
- Working with transactions and redemptions
- Running tier assessment
- Viewing promotions at a glance
- Administering group points
- Managing promotions
- Working with Oracle Loyalty batch jobs

This guide assumes that you have the permissions to perform the various tasks.

> **Note:** If you want to know more about best practices to help you improve performance in Oracle Loyalty, familiarize yourself with the Understanding Import and Export Management for CX Sales and B2B Service guide, and also Oracle Sales Cloud Optimizing Performance (Document 2420396.2) available on My Oracle Support.

Related Topics

- Understanding Import and Export Management for CX Sales and B2B Service
- Oracle Sales Cloud Optimizing Performance (Document 2420396.2)

Related Guides

Let's look at some of the other guides that can help you implement, maintain, and use Oracle Loyalty.

You can find these and other Oracle Loyalty guides on the Oracle Loyalty Help Center. A full list of Oracle application guides are available on Oracle Help Center, and additional Oracle Loyalty learning resources are available in the application online help, and in Oracle University..

Use these guides to complement your Oracle Loyalty administration.

Guide Title	Description
Implementing Loyalty	This guide describes how to define essential elements of your Oracle Loyalty implementation, mostly member and transaction offerings. For example, member status values, groups, or classes, and parameters to limit the number of member groups or levels.
Extending Loyalty	This guide describes how to extend various home pages and objects, such as members, transactions, programs, and redemption products.
Creating and Administering Analytics and Reports for Loyalty	This guide helps administrators and program managers to create, modify, and administer Oracle Loyalty analytics. You can edit the existing Oracle Loyalty analytics that come with the application, and also build new analytics and subject areas.
Securing Loyalty	This guide describes how to enable user access to Oracle Loyalty functions and data. Oracle Loyalty uses permissions and role-based access to application objects and functionality. Some security tasks are necessary only when you first implement Oracle Loyalty. But, you can do most tasks at any time and as new requirements emerge.

Related Topics

- Implementing Loyalty
- Extending Loyalty
- Creating and Administering Analytics and Reports for Loyalty
- Securing Loyalty

2 Set Up Loyalty Programs

Overview of Oracle Loyalty Programs

Loyalty programs create opportunities to engage, delight, and reward customers. You can foster long-term customer loyalty as part of an overall business marketing strategy. To set up loyalty programs, you must be either a Loyalty Program Administrator or a Loyalty Program Manager.

Oracle Loyalty offers an enterprise class, comprehensive, cross-channel solution for managing the complete loyalty program lifecycle. Oracle Loyalty helps attract new customers, retain high-value customers, and move others into the high-value segment using promotion incentives. These incentives can increase how often customers visit, motivate customers to spend more, both in-store and online, and create influential brand advocates.

You can define and implement one or more loyalty programs, or reward strategies, as needed to represent an organization, line of business, brand, or customer segment. You can track, reward, and recognize customer behavior, including repeat purchases of products, referrals, social activities, and business with loyalty program partners. You can leverage business partnerships as an integral part of loyalty programs and promotions.

Loyalty programs and promotions give members points as rewards for their purchases or for other behavior, such as:

- Airlines' frequent-flyer programs that give members bonus miles or discounts on hotel stays or car rentals
- Hotels' frequent guest programs
- Retailers' club programs that reward all purchases, or purchases of a particular manufacturer's products
- Cruise lines' and railways' frequent traveler programs
- Telecommunications firms' loyalty programs
- Coalition loyalty programs

You define the products and services for redemption, along with the redemption value in points. Tiers create incentives to earn products and services, including those from redemption partners.

Members can enroll into a program using the customer application. Loyalty administrators can also enroll members individually or in a group. Members can also refer friends and family, where you set up a reward for the new enrollments and referrals.

Other types of promotions give members extra rewards for specific behavior, for example:

- A promotion can give members bonus points for purchasing a specific product during a specific month.
- A program can include promotions that grant a set number of points for completing a purchase, additional points for being part of a high-level tier, and more points after buying three items.

All key loyalty program, membership, and transaction functionality is also available using REST APIs for a consistent customer experience across multiple channels.

Oracle Loyalty Users and Roles

Many people connected to your business may use Oracle Loyalty.

Users can be:

- The host organization's employees:
  - Loyalty managers, who define the programs, promotions, and metadata, and monitor loyalty transactions and other features.
  - Loyalty administrators, who handle the functional setup of the Oracle Loyalty application as well as its ongoing operation.
- Users who aren't employees, including customers and members. You can use the REST API to set up a member portal where customers can use the Web to enroll as loyalty members, update membership details, check their point balance, perform accrual or redemption transactions, and perform other tasks.

All of these users share information stored in the same database, and can see information that the others entered where appropriate.

Here are the job roles defined for employee users, and the application areas that each can access and work in:

Application Module	Loyalty Program Administrator	Loyalty Program Manager
Programs	Yes	Yes
Promotions	Yes	Yes
Members	Yes	Yes
Transactions	Yes	Yes
Service Requests	Yes	Yes
Group Administration	Yes	No
Batch Administration	Yes	No

Design a Loyalty Program

Loyalty programs let you target customers and provide incentives to increase business.

Depending on your business model, you might want to increase the frequency of a customer's interactions, the total dollars spent for each transaction, how often they use the member portal rather than a call center, or other behavior.

For example, if an airline finds that half its revenues come from 10 percent of its customers, then it would design the program to appeal to these frequent flyers.

A smaller research effort might just select the target customers, design the program, hold focus groups to get feedback, and then roll out the program. A more advanced effort can include simulations of customer segments, reward thresholds, and financial analysis to maximize the program's impact on customer behavior across the customer base.

To design a loyalty program:

1. Research and analyze your customer base to determine who your best customers are.
2. Determine how you want to affect their behavior.

Loyalty Points

Loyalty programs give members points for purchases or for other behavior.

Point Types

For each loyalty program, you create one or more loyalty currencies, called point types, and define point expiration rules. Use different point types to reward and recognize members based on their different activities, such as completing a flight or referring a friend to the program. Some point types could allow members to redeem points for a product or service, and others could track their behavior and grant rewards by assigning a new tier status. Point types allow for granular reporting on activities.

You can define eight point types, which can be used to track eight different types of member actions.

Multiple point types can also be used to differentiate the value of a purchase from the host company and from a partner. For example, an airline could say that in order to qualify for Silver tier status, a member has to earn either 25,000 points flying on the host airline or 35,000 points flying on partner airlines. In this example, points earned flying the host airline would be one point type, and points earned flying on partner airlines would be a second point type.

Programs can use loyalty point types to link specific actions more tightly with specific rewards. If a loyalty program tracks some member action, then you must create a specific point type for that action. For example, in the banking and credit card industry, you might create several different point types if you want to track how much your customers spend in several different areas, such as food, medicine, apparel, education, leisure, and travel.

A member may want to redeem a product, but has insufficient points to complete the redemption. Instead of the member forgoing the redemption, you can choose to allow negative points on the membership program. This facility is similar to a bank providing an overdraft facility on a customer's bank account. The next accrual activity pays back for the negative points. You can extend the negative points facility to members who have moved up to higher tiers of the program, or to all members of the program.

Point Subtypes

In addition to point types, you can also define point subtypes, which are used purely for administrative purposes.

For example, you might use different point subtypes to keep track of the different reasons that the points are given out. Points can be given out as an incentive with purchases or as a bonus, and you can create point subtypes named Incentive and Bonus to track these two different uses of points.

The point subtypes you create apply to all the available point types. For example, if you create point subtypes named Incentive and Bonus, then they can be used to track whether all your different Point Types are given out as an incentive or as a bonus.

When you define the point subtypes, you select one as the default that's given out if no subtype is specified when the promotion is defined.

> **Note:** At least one point sub type must exist for a program to get activated.

Point Items

A transaction debits or credits a member with points. Multiple promotions can give a member points as the result of a single transaction. When a member earns points from a transaction, a point item is created for each promotion's action that gives a member points. Thus, a single accrual transaction often results in multiple point items being created.

When a redemption transaction is processed, its use of points is mapped back to point items. It uses the available points from the point items that are closest to expiring. Since a redemption usually requires more points than were earned from a single transaction or point item, most transactions use the points from multiple point items.

All of the points associated with a single point item don't have to be used at once. For example, if a redemption requires 500 points and the point item closest to expiring has 1,000 points, then 500 of those points are used for the redemption. The remaining 500 points either are used by a later redemption or expire.

Qualifying Points

Qualifying points are points that count toward a member's tier status.

For example, a member who needs to qualify for the Silver tier might require 25,000 qualifying points. Other points, often called bonus points, can be used for redemption, but are non-qualifying and don't count toward a member's tier status.

> **Note:** A member's available points are the total points available for redemption, and include both qualifying and other points.

You can view how many qualifying points a member has on the member page. For details, see View a Member's Qualifying Points.

Members earn tier upgrades in real time. The Loyalty Batch Engine Main Job, when configured for the tier attribute, handles tier re-qualify or tier downgrades, using tier end dates. For details, see Overview of Batch Processing.

> **Note:** Qualifying points can't be redeemed or transferred. They are only deducted from a member's point balance when a transaction that assigns these qualifying points is canceled.

For information on how different tier assessment models use qualifying periods, tier start and end dates, and so on, see Types of Tier Assessment Models.

Point Roll-up to a Household

In any program, you can set up a Household type of member and roll-up, or accrue, qualifying points earned by the associated individual members to the household. This enables a family or other community to manage points and use them according to the needs of the group.

An individual member can belong to only one household, and all members of a household must be existing program members.

Individual members can control whether they belong to a household, and whether points earned accrue to the household at any given time. The household member can also specify an end date to cease an individual member's association.

Expiration of Points

Points that are given to members might or might not have an expiration date depending on how the points are defined. You define point expiration for the point type, and base it on one of the following:

- Member account activity
- A fixed period of time

If an accrual transaction is canceled, then the points that were given for that transaction are taken back from the member. Expired points can no longer be used, just as if the member had used them for a redemption award.

General point expiration is handled by the batch engine, which regularly monitors members' point expiration dates. If the expiration date is in the past, then the batch job expires the points and reduces the member's available point balance.

If an accrual transaction is canceled, then the points that were given for that transaction are taken back from the member.

Future Point Accrual

By default, points granted begin accruing on the transaction date. You can override this date and set an accrual date in the future. This is useful where you want to wait for travel to be taken before points accrue, or where products are returnable and you want to avoid redemptions against such purchases. For example, if a product has a 30-day return period, you might specify that the points accrue 31 days after the transaction date. For a flight purchase, you might want the points to accrue one day after the travel date.

This helps avoid fraud and helps manage point liability. By showing the points accrued as future points, the member can still receive instant gratification even though the points can't be redeemed immediately.

A member's available point balance excludes points that have a future accrual date. The lifetime point balance includes points with a future accrual date at the time the points are assigned.

A future accrual date applies only to non-qualifying points. The qualifying point balance doesn't depend on the future accrual date.

When setting up the promotion rule action, you can specify an accrual start date or create an attribute and date operation to calculate a future date.

CAUTION: Be sure to set the expiration date after the calculated accrual start date. If the accrual start date is later than the point expiration date, then any points granted in the promotion won't be available for the member to use.

If Oracle Loyalty receives an old transaction (from a partner, for example) where the return period is already over, then it sets the transaction processing date as the accrual start date.

Related Topics

- View a Member's Qualifying Points
- Overview of Batch Processing

Types of Tier Assessment Models

You can define different types of tier assessment models to use in combination with the tier class. When setting up a tier assessment model, you define the tier end date, and the qualifying start and end date, and other attributes for a tier record. General member tier assessment is handled by the batch engine, which regularly monitors members' tier end dates and processes them against the tier promotions configured.

Tier assessment can be based on one of the following models:

- Anniversary
- Fixed Date
- Rolling Period

If you assign a tier assessment model to a tier class, it creates a link on the tier name once you save and activate the tier class. Clicking on the link navigates to the Edit Promotion page for the tier.

Anniversary Tier Assessment Model

In the Anniversary tier assessment model, the qualifying period starts on the date when a member joins the loyalty program. A member's qualifying point balance is always set to zero every year on an end date determined by the member's anniversary date plus a snap-to date specified in the model's attributes.

The following attributes are required when a loyalty manager associates an Anniversary tier assessment model type with a tier class:

- Minimum Tier Length in Months. The minimum length of time that the tier is assigned to the member.
- Qualifying Period Length in Months. The length of the period for members to earn qualifying points to reach the tier.
- Tier End Date Snapped To. The point in time Oracle Loyalty uses to calculate the tier end date. The tier end date calculation is determined as the minimum tier length, extended from that date to the point specified in this field: the first day of the next month, the first day of the next quarter, or the first day of the next year.

  > **Note:** Monthly tier end dates mean the batch engine only needs to run twelve times a year for tier model processing.

Fixed Date Tier Assessment Model

The Fixed Date tier assessment model, the qualifying period starts on a fixed date each year for all qualifying loyalty program members. Tier end dates are also fixed for all members. The members' qualifying point balance is always set to zero at the end of the qualifying period.

The following attributes are required when a loyalty manager associates a Fixed Date tier assessment model type with a tier class:

- Tier Period Start. The fixed date on which the tier period starts. All members will use the fixed date. However, for newly enrolled members, the tier period start date is the date of enrollment, and in subsequent years it will be the fixed date specified in this attribute.
- Qualifying Period Start. The fixed date on which the qualification period starts.
- Tier Length in Months. The number of months the tier period will last. The tier end for all the members will be on a fixed date, determined by the Tier Period Start plus the length of the tier, specified in this field.
- Qualifying Period Length in Months. The length of the period for members to earn qualifying points to reach the tier.
- Minimum Tier Length in Months. The minimum length of time that the tier will be assigned to the member.

Rolling Period Assessment Model

In the Rolling Tier assessment model, the qualifying period starts when a member enrolls in the program. The member isn't assigned a qualifying period. The Rolling Period model creates an incentive for customers to make frequent purchases so they can stay in a higher tier.

Once the member attains a higher tier, the member's tier is effective for a specified period from the date of attaining the new tier, even if the rolling balance isn't sufficient for the member to remain in the current tier.

In the Rolling Period model, the member's qualifying point balance is never reset to zero at the end of the qualifying period. Instead, the qualifying balance is calculated as the total number of points earned during the past qualifying period. The qualifying period moves forward one day every day. If the qualifying period is two months, for example, then the qualifying period always begins two months prior to today's date, inclusive.

The points earned today and during the prior two months count toward the tier. Every day, Oracle Loyalty subtracts from the qualifying point total the points earned on the day before the qualifying period began.

The following attributes are required when a loyalty manager associates a Rolling Tier assessment model type with a tier class:

- Recurring Period. The recurring period unit, either years or months, used to measure the tier period length.
- Assessment Month. The month when tier assessment occurs if the recurring period is years. The value can be a month from January to December.
- Qualifying Period Length in Months. The length of the rolling period for members to earn qualifying points.
- Assessment Day. The day of the month, a value from 1 to 31, when tier assessment occurs.

Related Topics

- Assess a Member's Tier
- Change Members' Tiers Manually

Example of Tier Assessment Using the Anniversary Model

Let's look at an example of how a member might move in and out of various tiers over a three-year period.

In this example, events that impact a member include:

- Accrual of tier-qualifying points to automatically upgrade a member's tier
- Reaching the member's anniversary date
- Tier end dates
- Tier assessments

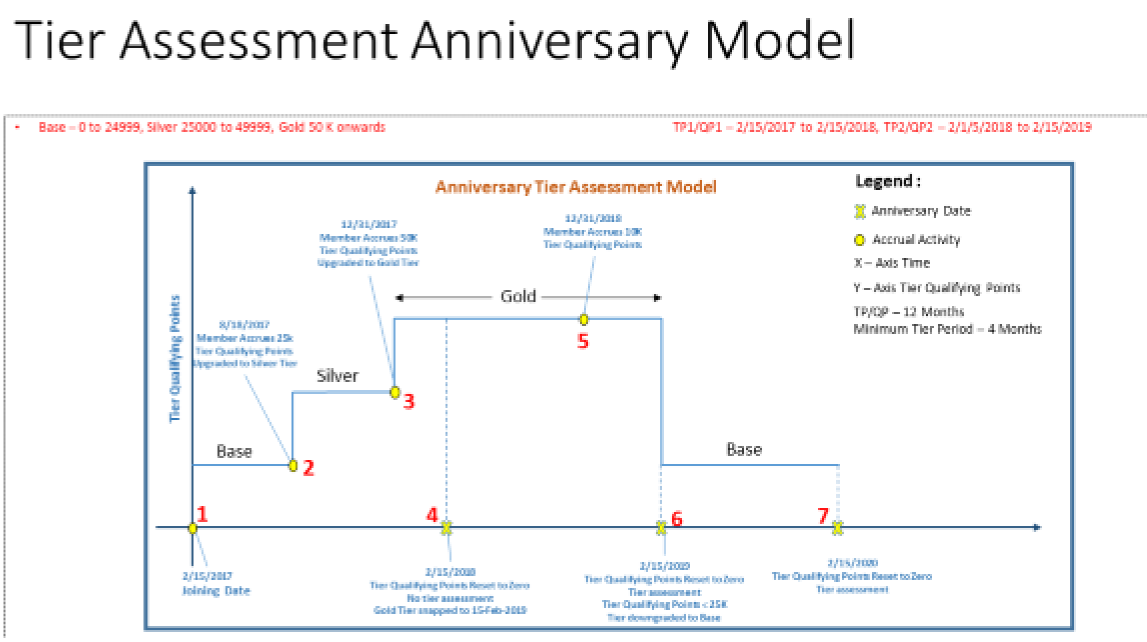
The example uses the following tier point requirements:

- Base: 0 to 24,999
- Silver: 25,000 to 49,000
- Gold: 50,000 and up

Also, for the required attributes we use:

- Tier period: 12 months
- Qualifying period: 12 months
- Minimum tier period: 4 months

Here is our example of tier assessment using the Anniversary model.



The sequence of activities and events, including how Oracle Loyalty recalculates the tier end dates across this example, are described here.

Event 1. A member enrolls in the loyalty program on February 15th, 2017, automatically entering the base tier.

Event Sequence	Tier	Tier Start Date	Tier End Date Calculation (Tier Start Date + Tier Length + SnapTo)	Qualifying Start Date	Qualifying End Date Calculation (Aligned with the Calculated Base Tier End Date)
1	Base	2/15/2017	2/15/2017 + 12 Months = 2/15/2018	2/15/2017	2/15/2018

Event 2. On 8/18/2017, the member accrues 25,000 qualifying points and upgrades to the Silver tier.

Event Sequence	Tier	Tier Start Date	Tier End Date Calculation (Tier Start Date + Tier Length + SnapTo)	Qualifying Start Date	Qualifying End Date Calculation (Aligned with the Calculated Base Tier End Date)
1	Base	2/15/2017	Changes from 2/15/2018 to 8/18/2017	2/15/2017	2/15/2018
2	Silver	8/18/2017	8/18/2017 + 4 months (minimum tier length) = 12/18/2017 However, since 12/18/2017 < 2/15/2018 (end of the tier period), the new tier end date snaps to 2/15/2018.	2/15/2017	2/15/2018

Event 3. On 12/31/2017, the member accrues 50,000 additional qualifying points and upgrades to the Gold tier.

Event Sequence	Tier	Tier Start Date	Tier End Date Calculation (Tier Start Date + Tier Length + SnapTo)	Qualifying Start Date	Qualifying End Date Calculation (Aligned with the Calculated Base Tier End Date)
1	Base	2/15/2017	8/18/2017	2/15/2017	2/15/2018
2	Silver	8/18/2017	Changes from 2/15/2018 to 12/31/2017	2/15/2017	2/15/2018
3	Gold	12/31/2017	12/31/2017 + 4 months (minimum tier length) = 4/31/2018 However, since 4/31/2018 > 2/15/2018, it snaps to 2/15/2019 (the next tier period end date)	2/15/2017	2/15/2019

Event 4. On the member's first anniversary, 2/15/2018, Oracle Loyalty resets the tier qualifying point balance to zero. However, because the tier end date is in the future, there's no tier assessment and they remain in the Gold tier.

Event Sequence	Tier	Tier Start Date	Tier End Date Calculation (Tier Start Date + Tier Length + SnapTo)	Qualifying Start Date	Qualifying End Date Calculation (Aligned with the Calculated Base Tier End Date)
1	Base	2/15/2017	8/18/2017	2/15/2017	2/15/2018
2	Silver	8/18/2017	12/31/2017	2/15/2017	2/15/2018
3	Gold	12/31/2017	2/15/2019	2/15/2017	2/15/2019
4	Gold	12/31/2017	2/15/2019	2/15/2017	2/15/2019

Event 5. The member accrues 10,000 qualifying points.

Event Sequence	Tier	Tier Start Date	Tier End Date Calculation (Tier Start Date + Tier Length + SnapTo)	Qualifying Start Date	Qualifying End Date Calculation (Aligned with the Calculated Base Tier End Date)
1	Base	2/15/2017	8/18/2017	2/15/2017	2/15/2018
2	Silver	8/18/2017	12/31/2017	2/15/2017	2/15/2018
3	Gold	12/31/2017	2/15/2019	2/15/2017	2/15/2019
4	Gold	12/31/2017	2/15/2019	2/15/2017	2/15/2019
5	Gold	12/31/2017	2/15/2019	2/15/2017	2/15/2019

Event 6. On the member's second anniversary, 2/15/2019, Loyalty resets the member's qualifying point balance to zero. Because the tier ends, Oracle Loyalty does a tier assessment and downgrades the member to the Base tier since they have no qualifying points.

Event Sequence	Tier	Tier Start Date	Tier End Date Calculation (Tier Start Date + Tier Length + SnapTo)	Qualifying Start Date	Qualifying End Date Calculation (Aligned with the Calculated Base Tier End Date)
1	Base	2/15/2017	8/18/2017	2/15/2017	2/15/2018

Event Sequence	Tier	Tier Start Date	Tier End Date Calculation (Tier Start Date + Tier Length + SnapTo)	Qualifying Start Date	Qualifying End Date Calculation (Aligned with the Calculated Base Tier End Date)
2	Silver	8/18/2017	12/31/2017	2/15/2017	2/15/2018
3	Gold	12/31/2017	2/15/2019	2/15/2017	2/15/2019
4	Gold	12/31/2017	2/15/2019	2/15/2017	2/15/2019
5	Gold	12/31/2017	2/15/2019	2/15/2017	2/15/2019
6	Base	2/15/2019	2/15/2020	2/15/2017	2/15/2020

Event 7. On the member's third anniversary, 2/15/2020, Oracle Loyalty resets the member's qualifying point balance to zero (no change). Because the tier ends, Loyalty does a tier assessment and the member remains in the Base tier.

Event Sequence	Tier	Tier Start Date	Tier End Date Calculation (Tier Start Date + Tier Length + SnapTo)	Qualifying Start Date	Qualifying End Date Calculation (Aligned with the Calculated Base Tier End Date)
1	Base	2/15/2017	8/18/2017	2/15/2017	2/15/2018
2	Silver	8/18/2017	12/31/2017	2/15/2017	2/15/2018
3	Gold	12/31/2017	2/15/2019	2/15/2017	2/15/2019
4	Gold	12/31/2017	2/15/2019	2/15/2017	2/15/2019
5	Gold	12/31/2017	2/15/2019	2/15/2017	2/15/2019
6	Base	2/15/2019	2/15/2020	2/15/2017	2/15/2020
7	Base	2/15/2019	2/15/2020	2/15/2017	2/15/2020

Event-Driven Rewards

Recognize your customers with automatic rewards for birthdays and anniversaries, or other date-related events. For example, you could reward all customers who made a purchase in the past month. Rewards could include points, vouchers, gift products, or early access on special occasions such as birthdays, loyalty anniversaries, or marriage anniversaries.

Event-driven rewards can earn your program members' emotional loyalty by making them feel special and valued apart from making transactions. The customer doesn't have to do anything to earn the reward.

Establishing an emotional connection enhances a member's preference to support the company. This is especially helpful when your offerings are comparable to that of your competitors.

You can base events on any member date field, such as the date of birth. Or, create custom dynamic date attributes such as a member's wedding date, and give customers a reward on that occasion.

Bonuses

Loyalty programs can give members bonuses, which give extra points to encourage certain behavior.

Bonus Types

There are two types of Oracle Loyalty bonuses:

- Enrollment bonus. Given to a member on enrolling in a loyalty program. A member can get an enrollment bonus only once.
- Referral bonus. Given to a member who refers a new individual who becomes a member of the program. A member can get multiple referral bonus by referring many individuals to the program.

To give members these bonuses, you must select the Enable Enrollment Bonus and Enable Referral Bonus check boxes in the Program record. However, these check boxes just enable the bonuses, and you must also create promotions to award the bonuses.

Related Topics

- Create Enrollment Promotions

Partners

Partners are other companies that work with the host company that runs the loyalty program. For example, an airline's loyalty program might allow members to earn frequent-flyer points by doing business with partners that are hotels, car rental companies, financial institutions, and retailers.

The host company usually has an agreement with the partner. Under this agreement, the host company can charge the partner fees for various transactions and services that a partner requests for a given loyalty program. Fees include monetary fees and points.

You can create a new partner or select an existing partner and associate it with the loyalty program.

You can also use partner billing to track points assigned to each program member by partner transactions. For more information, see the Partner Billing topic.

Partner Billing

To track total points assigned by a business partner to program members, you can activate billing for the partner.

You must assign a billing type for the partner: prepaid or postpaid. You define partner term attributes and specify the conversion rates to apply to point types for partner transactions.

Prepaid Billing Partners

Prepaid partners purchase point blocks in advance. Then, as members earn points from qualifying partner transactions, Oracle Loyalty applies the conversion rate for the point type and deducts that number of points from the block point total. The partner must have sufficient points remaining in the point block to assign points to members.

Loyalty administrators or managers can add point blocks on behalf of the partner.

For cancellation transactions, Oracle Loyalty reverts the appropriate number of points to the point block.

If a partner has multiple point blocks created for the same point type, then Loyalty deducts the points from the block with the earliest start date first.

You use the Partner Debit Main Job to process the debits and credits to partner point blocks. This job queries all accrual transactions that involve partners whose billing type is Prepaid. For each prepaid partner transaction, the job debits the appropriate number of points from the partner's point block. For details on how to schedule jobs, see the Create a Batch Process topic.

Postpaid Billing Partners

For postpaid billing, you generate a bill at the end of each month using Oracle Loyalty partner billing analytics. Each time a member earns points for a qualifying partner transaction, Oracle Loyalty applies the conversion rate for the point type and includes those points in the billing.

Partner Term Attributes and Conversion Rates

For each point type you use with a billing partner, you must specify the conversion rate. Loyalty applies the conversion rate to determine the number of points to deduct from a partner's point block or to include in their billing.

For example, for a prepaid partner:

- If the conversion rate is 1 and 100 points are assigned to a member, then 100 points get deducted from the partner's point block.
- If the conversion rate is 2 and 100 points are assigned to a member, then 100 is multiplied by two, and 200 points get deducted from the partner's point block.

Related Topics

- Overview of Batch Processing
- Create a Batch Process

Time Zones

Each loyalty program can use the time zone that's best for your company and customers.

When you create a new program, be sure to set the time zone so that you capture all date and time data using your company's time zone. Otherwise, Oracle Loyalty uses the time zone of the Oracle Loyalty application server. You don't want to be operating in a different time zone from your time-effective data.

Point expiration dates, point balances, and so on are all dependent on the date and time of the time zone in effect when the data is created.

For a loyalty program already in use, setting up a time zone is effective only on data created after the setup. Historical, time-stamped data remains unchanged.

Set Up Programs

How You Set Up Programs

Let's look at the general steps involved in setting up loyalty programs.

Step	Description	Topic Where You Can Find More Information
1	Create a new loyalty program and enter general information about it.	Create a Program
2	Add any participating partners. Later, when transactions are created that use the program, you can choose the business for the transaction from partners you added here.	Add Partners to Programs
3	Define one or more point types available for the program. You can also define point subtypes.	Define Point Types and Subtypes for Programs
4	Define tier classes and tiers for the program.	Define a Tier Class and Tiers for Programs
5	Define program-level attributes to use for creating promotion rules. Attributes you create at the program level are available for all promotions in the program.	Create Program-Level Attributes

Step	Description	Topic Where You Can Find More Information
	Note: You can also create attributes for use in individual promotions.	
6	Define promotions to reward customers for purchases.	How You Create a Promotion
7	Set up the redemption products that customers can buy with points.	Set Up Redemption Products
8	(Optional) Set up event-driven rewards to give customers points on special dates, such as their birthday.	How You Set Up Event-Driven Rewards

Create a Program

Here's how you create a loyalty program:

1. Open Loyalty Programs.
2. Click Create Program, and complete the necessary fields:
    a. Enter the program name, description, and start date.
    b. Depending on your business model, you can also enable enrollment bonuses, referral bonuses, and negative points.
    c. Click Save and Continue.
    d. Choose a primary point type and a time zone.

    > **Note:** If you want to know more about enable enrollment bonuses and enable referral bonuses, see the topic Bonuses. For more information on negative points, see the topic Redemptions.

3. Click Save.
4. Add other program features using the icons.

Related Topics

- Redemptions

Add Partners to Loyalty Programs

After defining the program, add partners who participate in this program. Later, when you create new transactions, you can choose the business for the transaction from partners you added here. If you create a transaction and don't choose a partner, Loyalty uses the host company.

To associate an existing partner with a loyalty program:

1. Open Loyalty Programs.

2. Choose the loyalty program.
3. Click Partners.
4. Click Add Partners.
5. Use the Add Partners page to search for and select the partners to associate with the program. You can search by partner details.
6. Enable partner billing:
   a. Enable the partner billing option.
   b. Choose the partner billing type.
   c. Specify the point type and conversion rate for the partner term attribute. You can optionally add more attributes.

To create a new partner:

1. On the partners screen, click Add Partners.
2. Click the Create Partner button.
3. Complete the necessary fields.

To add a point block for a prepaid billing partner:

1. Open Loyalty Programs, and then open your program.
2. On the program screen, click Point Blocks.
3. Click the Add button.
4. Complete the necessary fields, including the original number of points for the block.

> **Note:** You must use the Loyalty Partner Debit Main Job to process the debit of point blocks for accrual transactions with prepaid partners.

Define Point Types and Subtypes for Programs

When you set up a loyalty program, you must define the point types available for the program, whether there are multiple types or just one. You can also define point subtypes.

If the Active field for a point type is selected, then all other fields of this point type are read-only. You must deselect the Active check box before you can edit the other fields.

You can create a maximum of 8 point types, both active and inactive.

To define point types and subtypes:

1. Open your program and click the Point Types icon.
2. Add a new record to the Point Types list for each point type, then complete the necessary fields.
3. Click the Point Subtypes icon.
4. Add a new record to the Point Subtypes list for each point subtype, and complete the necessary fields.

Define a Tier Class and Tiers for Programs

While creating a new program, the loyalty manager defines the tier class and tiers for the program:

- Tier Class. A tier category for business or program purposes. The loyalty manager can edit the default tier class that's created when defining a new loyalty program. This release doesn't support creating additional tier classes for a program.

- Tiers. Point levels in a loyalty program that members earn the right to join, such as Gold Member or Platinum Member, based on how much they purchase. Members get rewards for being in higher tiers, so tiers are an important incentive in loyalty programs.

You can optionally associate a membership card type with a tier, which generates membership cards automatically whenever:

- A member enrolls in a loyalty program
- At tier changes, including upgrades, requalification, and downgrades

You can also generate membership cards manually.

CAUTION: Don't change the name of a tier class after you have activated it.

To edit the default tier class:

1. Open the loyalty program, and click the Tier Management icon.
2. You can edit the Tier Class Name, Primary Tier, Qualifying Point Type, and Tier Assessment Model.
3. You can activate the tier class.

For details about tier assessment model types and attributes, see the Types of Tier Assessment Models topic.

To define tiers:

1. Open the loyalty program, and click the Tier Management icon.
2. Click the Add button to add a new Tier, and complete the necessary fields.
   You can set the default tier option for one of these tiers, making it the default tier that customers are automatically associated with then they become members of this loyalty program.

Define Negative Point Limits for Tiers

When you set loan limits based on tier, the limit is based on the member's primary tier. If no tier or tier class is selected, then the negative point limit is applicable for all the tiers and all members in the loyalty program.

You set the limit in two ways:

- Percentage. Specify the percentage of point balance that's the limit for members in this tier to use as negative points.
- Absolute value. Specify the maximum number of allowed negative points that members in this tier can borrow.

You use the Basis field to specify whether the negative points allowed is the maximum or the minimum of these two limits. You can select the maximum so members with a very low point balance or no point balance can still be in negative points to the amount specified as the absolute value. Or you can select the minimum so members with a high point balance can't borrow a large number of points.

For example, you specify the absolute value of the negative point limit for the gold tier at 3,000 points. You also set the loan limit for the gold tier at 20% of the point balance, so a member who has accumulated 10,000 points can borrow 2,000 points. If you choose Maximum in the Basis field, then the member with 10,000 points can borrow up to 3,000 points, and if you choose Minimum in the Basis field, then the member with 10,000 points can borrow up to 2,000 points.

To set negative point limits for tiers, do the following:

1. Open your loyalty program and clear the Active check box to edit the program.
2. Click the Negative Points icon.
3. Click Add to add a new record for each combination of point type and tier that allows negative points.

4. Complete the following fields:
    - Tier Class. Select the tier class whose members are allowed negative points. This field is optional.
    - Tier. Select the tier whose members are allowed negative points. This field is optional.
    - Point Type. Select the point type that members can use as negative points.
    - Percentage. Enter the percentage of point balance that's the limit for members in this tier to use as negative points.
    - Absolute Value. Enter the maximum number of allowed negative points that members in this tier can borrow.
    - Basis. This field determines whether the member can borrow the greater or lesser of the values specified in the % Point Balance and Absolute Loan Value fields. Select Maximum to allow members to borrow the greater of the two values, or select Minimum to allow the lesser of the two values.
5. Select the Active check box to activate the program again.

Set Up Redemption Products

Use this procedure to enable members to obtain products by redeeming loyalty points.

To set up a product for redemption with loyalty points:

1. Create the products:
    a. Open Sales, and then click Products.
    b. Click Create Product, and complete the necessary fields.
    c. Repeat the previous step to create all the products you want.
2. If you haven't already done so, assign the root Product Group so it can be used by Oracle Loyalty and assign its usage to Oracle Loyalty:
    a. Open Manage Product Group Usage.

       The easiest way to do this is to search for "manage product groups" and click the link in the search results.
    b. Select the record that has the Loyalty Usage, and associate the Product Group with this usage.
    c. In the Loyalty Details list, add a record and select the root product group.
3. Associate the redemption products that you created with the product group you use to hold redemption products:
    a. Open Manage Product Groups.
    b. Select the root product group, and click Lock.
    c. Click the Products tab.
    d. Add new records to the list products list and select the redemption products that you created.
    e. Click Save.
    f. Click Publish to allow Oracle Loyalty to use the updated product group.
4. Associate the products created earlier with a loyalty program as redemption products:
    a. Open Loyalty Programs.
    b. Select the program.
    c. Click the Redemption Products icon.

d. In the Redemption Products screen, click Add to add a new record, select the redemption product in the Product field, and complete the other necessary fields.

   This product is available to select here because it is in the root product group, which is associated with the loyalty usage.

Related Topics

- Promotion Elements

How You Set Up Event-Driven Rewards

Let's look at the general steps involved in setting up event-driven rewards.

Step	Description	Guide or Topic Where You Can Find More Information
1	Create a member attribute on a member date field such as date of birth, or on a dynamic attribute such as member wedding date. You use this attribute when creating the event	Create Program-Level Attributes
2	Create an event-driven reward specifying the event parameters described in this topic.	Example of an Event Driven Reward
3	Create an event transaction attribute with the Comment transaction type. You use this attribute when setting up the related promotion.	Create Program-Level Attributes
4	Create a promotion with the condition for the event-driven reward. Use promotion type Accrual, and sub-type Event Reward.	How You Create a Promotion
5	Run the Loyalty Event-Driven Rewards Main Job to generate event reward transactions and place them in the queue. This job checks events against the member date attribute for each member to create transactions of type Accrual-Event.	Create a Batch Process
6	Run the Loyalty Batch Engine Main Job. Event reward transactions automatically process along with all other transactions when you run this job. The job checks event promotions and issues rewards to members with qualifying data.	Create a Batch Process

Event Parameters

Here are the event parameters you set when creating an event using REST.

Event Parameter	Description
Event Name	A name for the event, such as Member Birthday.
Member Attribute	The name of the member attribute you defined for the event, such as Date of Birth.
Subtracted Days	The number of days to subtract from today's date to begin the event trigger. For example, if the value is 5, the Loyalty Event-Driven Rewards Main Job creates transactions for all members with qualifying dates that are up to 5 days earlier than the event date.
Added Days	The number of days to add to today's date to end the event trigger. For example, if the value is 2, the Loyalty Event-Driven Rewards Main Job creates transactions for all members with qualifying dates that are up to 2 days later than the event date.
Cooling Period (Weeks)	The period, in weeks, during which the reward won't repeat if the Loyalty Event-Driven Rewards Main Job runs again. Once a job creates an event transaction for a particular member, it waits until the cooling off period is complete before it can generate another. For a birthday, for instance, you might set the cooling off period to 48 so that a member can't be rewarded again until their next birthday. For a monthly event-driven reward, the cooling off period could be 4 weeks. Coordinate this parameter with how frequently you run the Loyalty Event-Driven Rewards Main Job.
Ignore Year	Indicates whether the event trigger considers the year (Y or N). If an event is repeatable, such as a birthday, set the value to Y. This event doesn't consider the year, just the day and month. For one-time events where you want to take the year into consideration, such as the date of last purchase, set the value to N.
Active	Indicates whether the event is active (Y or N).

Example of an Event-Driven Reward

Here's an example of how to reward 1000 points to members with October birthdays:

1. Open your loyalty program and click Program Level Attributes.
2. Create a member attribute called Date of Birth on the member date of birth field, and activate the attribute.
3. Click the Event Driven Reward icon. Click Create Event Driven Reward. and specify these values:

    - Event Name: Member Birthday

- Member Attribute: Date of Birth

  This is the member attribute you created in the Step 1.
- Subtracted Days: 0
- Added Days: 31
- Cooling Period (Weeks): 44
- Ignore Year: Y
- Active: Y

> **Note:** You can optionally do this step using REST.

4. With the event inactive, click Add to create an event transaction attribute with the Comment transaction type, and the name TxnEvent.

> **Note:** You can optionally do this step using REST.

5. Create a promotion of type Accrual and subtype Event Reward.
6. Create a rule, where if TxnEvent equals Member Birthday, then you assign 1000 points.
7. Run the Loyalty Event-Driven Rewards Main Job on October 1st to generate an event transaction for each program member with a birthday within 31 days (the month of October).
8. Run the Loyalty Batch Engine Main Job, which processes the event transactions and rewards 1000 points to each member with qualifying data.

Modify Programs

Before you can modify a loyalty program, you must deactivate it. Changes in the program become available to users after you reactivate the program.

To modify a loyalty program:

1. Open Loyalty Programs.
2. Click the name of the program you want to modify to display the edit program screen.
3. Clear the Active check box to edit program.
4. Modify the program as needed.
5. When you have made all needed changes, select the Active check box to activate the program again.

Measure Programs

Once a loyalty program has been in use for a period of time, you measure how effective it has been in reaching your marketing objectives by setting up and administering Oracle Loyalty Analytics.

For more information on creating, modifying, and administering analytics within Loyalty Cloud, see the Creating and Administering Analytics and Reports for Loyalty guide.

> **Note:** The Creating and Administering Analytics and Reports for Loyalty guide is a companion document to the Oracle CX Sales Creating and Administering Analytics guide, and it assumes that you're familiar with the analytics functionality provided with Oracle CX Sales.

Related Topics

- Creating and Administering Analytics and Reports for Loyalty
- Creating and Administering Analytics

3 Set Up Loyalty Promotions

Overview of Promotion Types

To set up loyalty promotions, you must be either a Loyalty Program Administrator or a Loyalty Program Manager. There are two main types of loyalty promotions:

- Reward Promotions. These promotions give members opportunities to earn points that they can exchange for products or services or to earn other rewards. For example, the promotion might allow them to earn extra frequent-flyer miles. You can optionally specify a future accrual date for points, which is useful when products are returnable or a flight must be taken first.
- Redemption Promotions. These promotions execute when members redeem points for rewards. They reduce the member's available point balance and provide the member with some reward.

There are a number of different types of reward promotions. Some common types are:

- Simple Promotions. These promotions reward members for a single purchase.

  For example, if they fly from SFO to LAX in August 2013, then they earn 1000 bonus points if they're a Platinum member or 500 bonus points if they're not a Platinum member.
- Frequency Promotions. These promotions reward members for multiple purchases of the same type.

  For example, if they fly from SFO to LAX in August 2013 three times, then they earn 3000 bonus points, if they fly four or five times, then they earn 4000 bonus points, or if they fly more than five times, then they earn 5000 bonus points.

  Frequency promotions aren't based on transaction processing directly. Let's say you have a transaction that contributes to a points balance crossing a frequency bucket threshold, which results in the member qualifying for a frequency promotion. For example, this frequency promotion rewards the member with 3000 bonus points. If you cancel this qualifying transaction, any rewards or actions, resulting from the frequency promotion, such as the 3000 bonus points in this example, can't be canceled.

  > **Note:** Make sure that the bucket rule applies to the promotion or member attributes and not to the transaction attribute. This rule is applied when a promotion attribute is updated, and it doesn't have the context of the transaction. Any action initiated by the bucket rule isn't displayed in the transaction processing information. If the bucket rule assigns points to a member, then this action is only visible at the member point item level without a transaction reference number.
- Complex Promotions. These promotions reward members for multiple purchases of different types. These are often run with partners to encourage members to buy both the company's and the partner's products.

  For example, if members stay at a specific hotel and rent a car from a specific car rental company, then they get 5000 bonus points. You can also create base promotions that you can leverage in complex promotions.
- Action-Based Bonuses. These promotions reward members for some action other than a purchase.

  For example, if members update their member profile, then they receive 500 bonus points, or if they register with your reward program, then they get 2000 bonus points. These points are granted only once.
- Partner Promotions. These promotions reward members' activity with partner companies.

For example, an airline has hotel companies as its partners, and it runs a promotion giving bonuses for renting hotel rooms.

- Enrollment Promotions. These promotions require members to enroll in the promotion for it to be applied to their transactions. Enrollment promotions let loyalty program managers set up promotions targeted for a specific audience, letting them measure the effectiveness of the promotions at converting incremental sales or change in member behavior independent of coincidental promotion criteria fulfillment.
- Order-Based Promotions. These promotions reward members for multiple purchases made in a single order.

  For example, if members buy flights and a hotel in the same order, then they receive a 5% discount.
- Event Promotions. You create event promotions for use with event-driven rewards.

  For example, an event-driven reward can reward members on their birthday or anniversary, to promote emotional loyalty.
- Base Promotions. These promotions are designed to simplify the process of setting up complex promotions. They're used to calculate base points, based on any of the transaction attributes, member attributes, promotion attributes and so on. Each program can have only one base promotion. This type of promotion is created, with no rules, as soon as the program is saved. Users can't manually create this promotion, nor can they delete it, but they can add rules to calculate the base points or accrual, based on the transaction attributes.

You can create all of these types of promotions using the same framework of rules, criteria, and actions.

Promotion Elements

You create these elements to define a promotion:

- Promotion. Basic promotion data includes general information such as its name, the dates when it's active, and the promotion type.
- Rule. A promotion includes one or more rules. A rule includes criteria and includes actions that depend on whether a transaction satisfies the criteria.

  > **Note:** Before you start processing any transactions, you must set up promotion rules for your Transaction type and subtype. For example, let's say you have a promotion of type Redemption, with a subtype Cancellation. If you're trying to process a transaction of type Redemption, with a subtype Cancellation, and you don't have any promotion with the same type and subtype, then the transaction processing fails and displays an error similar to the following: `During the rule evaluation process, the decision function ORA_TXN_RED_ORA_RED_CNCL_DF wasn't found in dictionary oracle.apps.sales.loyalty.ProgramXXXXXXXXXXXXXXXX. Correct the rules values and try again. (LOY-5595256)`

- Criteria. Each rule includes one or more criteria. What action the rule takes depends on whether the transaction meets the rule's criteria.
- Action. Each rule includes one Then action and optionally one Else action. The Then action is executed if the transaction satisfies the rule's criteria. The Else action is executed if the transaction doesn't satisfy the rule's criteria.
- Attribute. An attribute is usually based on a field of a record. Criteria compare an attribute to a value or to another attribute. You must define the attribute before you define the rule.

During transaction processing, Oracle Loyalty validates this information in the active promotions. Promotions that match this criteria are then evaluated against the transaction being processed.

To create a new promotion, a useful option is to copy an existing promotion. Copying a promotion brings in the promotion type, rules, attributes, and effective date information, which you can then edit. This can save time and reduce errors.

Attributes for Promotions

Attributes represent properties of objects, which are used by criteria. Criteria can compare an attribute to a value or compare an attribute to another attribute.

Attributes generally represent fields in records, such as the transaction record or the member record. For example, to create a promotion that only applies to Platinum members, you must create an attribute representing the Tier field of the member record. Then, as one of the criteria for this promotion, you create a criterion saying that this tier attribute equals Platinum.

Before you create a promotion, you must define the attributes required by the promotion. You can define attributes at two levels:

- Promotion-level Attributes. Attributes are usable only for the promotion. You define promotion attributes at the Promotion screen.
- Program-level Attributes. Attributes are usable for any promotion in the program. You define program attributes at the Program screen.

You can create the following types of attributes. Apart from promotion-level attributes, you create all of the other types of attributes at the program level:

- Promotion-Level Attributes are dynamic values that can be used to track behavior during a promotion.

  For example, if a promotion says that customers will get a bonus after making ten transactions during a period of two months, you can create a promotion-level attribute used as a counter to track the number of transactions for the member during that period.
- Member Dynamic Attributes are dynamic values that you create to track actions over the lifetime of a member. The value of a member attribute can be based on any field in a transaction, and they're updated every time a transaction takes place.

  For example, you might create a member attribute to track the total amount spent by a member. You would create a promotion to update this attribute when an accrual transaction with an amount spent is processed for a member.
- Member Field Attributes represent fields in the Member record.

  For example, you might create an attribute representing the State field of the Member record to create a promotion that applies only to residents of certain states.
- Member Tier Attributes represent fields of the Tier record for the member's tier.

  For example, you might want to create an attribute representing the tier end date, previous qualifying start date, or qualifying point balance.
- Transaction Attributes represent fields in the Transaction record.

For example, you might give an extra bonus if a purchase is larger than $1,000. In the rule action, you could create an attribute for the transaction date to calculate an accrual start date in the future for points earned.

- Calendar Attributes allow you to create criteria based on date or time of day.

  For example, a business might want to give extra points on Mondays.

- Point Totals Attributes allow you to create criteria based on the total number of points a member has accumulated.

  For example, you might give a special reward to customers who have accumulated 100,000 points.

When you copy a promotion, attributes from the original promotion copy into the new one.

Actions for Promotion Rules

You can apply the following actions in promotions:

- Assign Points: Gives points to the member. When you assign points, you must specify the point type and point subtype to assign to the member. You can optionally set a future start date for point accrual, point expiry, or both.

  > **Note:** If no point expiry is specified for the Assign Points action, then the point expiry that was specified when defining the point type is used.

- Assign Voucher - Absolute Value: Assigns a voucher that can be redeemed for a discount. The discount is an absolute value, such as $50.
- Assign Voucher - Percentage: Assigns a voucher that can be redeemed for a discount. The discount is a percentage of the purchase price, such as 10% off.
- Assign Voucher - Product: Assigns a voucher that can be redeemed for a product or a service, such as a night's stay in a hotel.
- Cancel Attribute: If the transaction is canceled, this action returns the value of the attribute to the value it had before the transaction processing.
- Cancel Points: If the transaction is canceled, this action returns the number of points that the member has to the number of points before the transaction processing.
- Cancel Voucher: If the transaction is canceled, this action returns the voucher that the member had before the transaction processing.
- Redeem Points: Redeems the member's available points, subtracting the specified number of points from the member's available point balance.
- Redeem Voucher: Redeems the member's voucher.
- Reject Transaction. Rejects the member's transaction and the member's transaction status is updated to Rejected.
- Tier Change: Changes the member's tier. For example, if a promotion says customers will be upgraded to Platinum tier if they spend more than $5,000 in a year, this action is used to assign them to the Platinum tier.
- Update Attribute - Date: Changes the value of a date attribute.
- Update Attribute - Integer: Changes the value of an integer attribute.
- Update Attribute - Number: Changes the value of a numeric attribute.

- Update Attribute - Text: Changes the value of a text attribute.

Promotions Based on Day or Time of Purchase

You can create promotions that reward purchases made on specific days, purchases that are made at specific times, or purchases that are made frequently. For example, promotions can reward:

- Purchases made between 4 PM and 6 PM.
- Purchases made on Mondays.
- Purchases made during the first week of the year.
- The third purchase made in a given week.
- The second purchase made in the same day.

These promotions are generally used by retail stores that want to attract customers at specific times or that want to encourage customers to make frequent purchases.

Calendar Attributes

You use calendar attributes to keep track of the dates and times of customers' purchases in order to create promotions rewarding frequent customers. Calendar attributes must be created at the program level. They can be used by all promotions in the program.

The following table lists the methods available when you create calendar attributes, and their uses. When you create a calendar attribute, you select one of these methods, which returns the value of the attribute.

Method	Description	Usage
Day Name	Returns a string representing the name of the day of the date from the transaction's Date:Time stamp.	If the transaction's Date:Time stamp is 8/2/2009 11:28:39 PM, then the Day Name method returns Sunday.
Month Name	Returns a string representing the name of the month of the date from the transaction's Date:Time stamp.	If the transaction's Date:Time stamp is 8/2/2009 11:28:39 PM, then the Month Name method returns August.
Last Week of Month	Returns 0 for true or 1 for false to indicate whether the transaction occurred during the last week of the month.	The user just specifies the month in the criterion, and the attribute calculates the last week.
Last Week of Year	Returns 0 for true or 1 for false to indicate whether the transaction occurred during the last week of the year.	The user just specifies the year in the criterion, and the attribute calculates the last week.
First Week of Month	Returns 0 for true or 1 for false to indicate whether the transaction occurred during the first week of the month.	The user only specifies the month in the criterion, and the attribute calculates the last week.

Method	Description	Usage
First Week of Year	Returns 0 for true or 1 for false to indicate whether the transaction occurred during the first week of the year.	The user just specifies the year in the criterion, and the attribute calculates the first week.
Day of Week	Returns an integer representing the number of the day of the week.	If the transaction's Date:Time stamp is 8/2/2009 11:28:39 PM, then the Day of Week method returns 1, because this is a Sunday, the first day of the week.
Day of Month	Returns an integer representing the number of the day of the month.	If the transaction's Date:Time stamp is 8/2/2009 11:28:39 PM, then the Day of Month method returns 2, because this is the second day of the month.
Day of Year	Returns an integer representing the number of the day of the year.	If the transaction's Date:Time stamp is 12/31/2009 01:01:01 AM, then the Day of Year method returns 365, because this is the 365th day of the year.
Week of Year	Returns an integer representing the number of the week of the year.	If the transaction's Date:Time stamp is 1/9/2009 01:01:01 AM, then the Week of Year method returns 2 because this is the second week of the year.
Month of Year	Returns an integer representing the number of the month of the year.	If the transaction's Date:Time stamp is 8/2/2009 11:28:39 PM, then the Month of Year method returns 8.
Hour	Returns an integer representing the hour of the transaction.	If the transaction's Date:Time stamp is 8/2/2009 11:28:39 PM, then the Transaction Hour attribute method returns 23.
Year	Returns an integer representing the number of the year.	If the transaction's Date:Time stamp is 8/2/2009 11:28:39 PM, then the Year method returns 2009.
Date	Returns the date from the transaction's Date:Time stamp.	If the transaction's Date:Time stamp is 8/2/2009 11:28:39 PM, then the Date method returns is 8/ 2/2009.

Create Promotions

How You Create a Promotion

This process outlines the basic tasks involved in creating promotions. Before you create promotions, you must create a loyalty program.

Here are the tasks you must follow to create loyalty promotions.

Step	Description	Topic Where You Can Find More Information
1	You create the promotion record, which includes general information about the promotion, such as the name and start date. You can optionally copy an existing promotion and edit the new one as needed.	Create a Promotion
2	You define program-level attributes for a program, which are then available to all promotions in that program.	Create Program-Level Attributes
3	You create promotion-specific attributes which are available only for that promotion. Promotion-specific attributes represent fields of the promotion bucket. The promotion bucket is an intersection of the member and promotion records, and it has additional fields that are used for attributes to store values specific to the promotion.	Create Promotion-Level Attributes
4	You create rules for loyalty promotions, which have one or more criteria and one or more actions associated. The criteria determine whether the rule qualifies, and the action specifies what the rule does.	Create Program-Level Attributes
5	You create criteria and actions for the rule. The criterion of a rule is a conditional statement that Oracle Loyalty evaluates as true or false.	Create Criteria and Actions for Promotion Rules
6	You control whether a promotion is applied to transactions by activating or deactivating the promotion.	Activate and Deactivate Promotions
7	If the promotion requires member enrollment, then you select the Enrollment Required option and enroll members.	Create Enrollment Promotions

Related Topics

- How You Set Up Programs

Create a Promotion

A promotion record includes general information about the promotion, such as its name and when it's in effect.

To create a loyalty promotion record:

1. Open Promotions.
2. Click Create Promotion.
3. Complete the necessary fields.

If you want to create a promotion similar to an existing one, you can copy that promotion instead. You can then edit the promotion as needed. For more information, see the Copy a Promotion topic.

Don't activate a promotion until you have completed defining the rules, effective dates, and other information.

Copy a Promotion

You can create a promotion by copying an existing promotion. When you copy a promotion, the promotion type, rules, attributes, and effective date copy into the new promotion. You can then edit the new promotion as needed.

Copying an existing promotion can save time and reduce errors.

Enrolled members don't copy into the new production.

To copy an existing promotion:

1. Open Promotions.
2. Select the promotion you want to copy.
3. On the Edit Promotions page, click Actions, and select Copy Promotion.
4. On the Copy Promotion dialog, type a name for the new promotion.
5. Click Save and Continue.
6. On the Edit Promotion page, make any necessary changes to the rules or other information in the new promotion. Click Save.
7. Enroll members in the promotion, if needed.
8. Activate the promotion when it's appropriate.

Create Base Promotions

Oracle Loyalty managers and administrators can set up base promotions to calculate the initial value of rewards, or number of points, for each transaction. You can then use this value in other promotions, saving time and reducing errors.

You can create either a single base promotion for an entire program or create separate base promotions for a line of business, product type, and so on.

A base promotion only sets a value and updates attributes, but doesn't reward points. You must set up another promotion to actually reward points.

You could calculate base points on the amount spent or miles flown, and then calculate bonus promotions such as a tier bonus or cabin bonus on top as a percentage or multiple of the base points. For example, an airline might want to use a base promotion as follows:

- Base promotion rewards an equal number of points for each mile.
- Tier Bonus Gold promotion rewards 100% of the base points.
- Tier Bonus Silver rewards 50% of the base points.
- Cabin Bonus First Class rewards 100% of the base points.
- Cabin Bonus Business rewards 50% of the base points.

Other uses for a base promotion could include:

- Calculating distance for travel, and also implementing minimum points for shorter distances.
- Calculating a credit score based on a predefined attribute.
- Complex calculations based on various member and transaction criteria, which can be done once and set for all promotions.

Oracle Loyalty applies base promotions using the following rules:

- If there are multiple base promotions, the latest one activated is applied first. All non-base promotions apply in sequence after the base promotions.
- Base promotions are used only for calculating a base price for Accrual-Product transactions.
- The value calculated applies only during transaction processing and not bucket processing.
- You must ensure that multiple base promotions don't update the same attributes in the Set a Value action in the same transaction. (If multiple base promotions are defined and active, they would be evaluated in order from newest to oldest, however the value of the oldest base promotion would overwrite the others.)

Promotions are executed in the following sequence:

1. Base promotion. The latest activated base promotion is applied first.
2. Non-base promotion. All non-base promotions are applied individually.
3. Bucket rules. These rules are executed in the event a non-base promotion updates a promotion specific attribute, and that attribute crosses the threshold defined in the bucket rule.
4. Tier promotions. These are applied if a previous promotion assigns qualifying points, and if a member crosses the threshold to upgrade.

When a promotion has multiple rules, the Oracle Loyalty engine tries to execute each rules criterion, one by one. On meeting the first criterion from the rules defined in the promotion, the Oracle Loyalty engine executes the actions part of that rule, and no further rules from that promotion are considered and checked. The sequence in which promotion rules are evaluated isn't fixed, and can't be controlled.

To create a base promotion:

1. Open Promotions, and click Create Base Promotion.
2. Specify a promotion name, a start date, and select the program.(The type and subtype default to Accrual and Product.) Click Save and Continue.
3. On the edit promotion page, click the Promotion Specific Attributes icon.
4. Click the Add Attributes button and complete the necessary fields.
5. Click the Manage Rules button, and create the promotion rule.
6. In the Actions window, use the Set A Value action to set the base points or other attribute for the base promotion.

   This value is used by the remaining non-base promotions to correctly evaluate the attribute for the transaction, and is not saved in the database.

7. Click the Active check box to activate the promotion.
8. Click Save.
9. You can create additional rules, if needed.

Create Order-Based Promotions

You can create retail promotions, where the promotion applies to items purchased together, or a quantity of particular items purchased on an order.

Examples of these common order-based promotions include:

- If the customer purchases a memory card on the same order where they purchase a camera, then they receive 100 bonus points.

  For this promotion, you must create promotion attributes for the memory card and camera products. In the promotion rule, you check whether both product attributes are greater than or equal to one, choose the Assign Points action, and specify 100 points.
- If the customer purchases three or more of the same branded products on a single order, then they receive a 10% discount voucher for the brand products. This can include products on a single product line or from multiple product lines, totaling three.

  For this promotion, you must create an attribute that stores the total of items in that brand, and create a rule increasing the attribute value by one for each line item with that brand. After processing the line items, the rule must check whether the value of the attribute is greater than three, then choose the Assign Voucher action, and specify the 10% discount.

You must configure promotion-level attributes for the products to use in the promotion rules.

To create an order-based promotion:

1. Open Promotions, and click Create Promotion.
2. Fill in the fields, and choose Product as the sub type. Click Save and Continue.
3. Click the Order Level Promotion check box.
4. Create and activate promotion-level attributes for the promotion products.
5. Click the Manage Rules button, and create the promotion rule. You can create additional rules, if needed.
6. Click the Active check box to activate the promotion.
7. Click Save.

Create Program-Level Attributes

You define program-level attributes for a program, which are available to all promotions in that program.

You can define program-level attributes while you're setting up the program, or you can wait until you're defining promotions for the program. In either case, define attributes at the program level, rather than the promotion level, only if they're used by multiple promotions in the program.

You can use promotion-level attributes to create frequency promotions that reward customers when they reach some threshold, such as spending more than $100 or making a specific number of purchases with a specific partner.

To create program-level attributes:

1. Open Loyalty Programs, and then open the program that the attribute applies to.

2. If the program's Active check box is selected, deselect it on the edit program screen.
3. Click the Program Level Attributes icon.
4. In the Attributes view, click the Add button next to one of the types of attributes, and complete the necessary fields.
5. If you want the program to be active, select Active on the edit program screen.

Create Promotion-Level Attributes

Promotion specific attributes are used in only one promotion. They represent fields of the promotion bucket. The Promotion Bucket is an intersection of the Member and Promotion records, and it has additional fields that are used for attributes to store values specific to the promotion.

You can configure different cancel actions for members and promotions and attributes, depending on the data type of the attribute. Cancel actions include:

- Leave as is. This action is available for all data types. The value of the attribute remains the same when a transaction is canceled.
- Revert. This action is available for string and number data types only. The value of the attribute reverts to the value before the canceled transaction was processed.
- Cancel change. This action is available for the number data type only. The value after the transaction is canceled depends on the following:
  - Addition. If the canceled transaction added the attribute value, then the cancellation subtracts that same amount from the attribute value.
  - Subtraction. If the canceled transaction subtracted the attribute value, then the cancellation adds the same amount to the attribute value.
  - Multiplication, division, or set values. If the canceled transaction multiplied, divided, or set the attribute value, then the cancellation reverts the attribute value to the value prior to the cancellation transaction.

To create promotion-level attributes:

1. Open the required promotion.
2. If the promotion's Active check box is selected, deselect it.
3. Click the Attributes icon.
4. In the Attributes view, click the Add Attributes button, and complete the necessary fields.
5. If you want the promotion to be active, select its Active check box in the Edit Promotion

Related Topics

- Set Up a Transaction Cancellation

Create Rules for Promotions

A rule for a loyalty promotion has one or more criteria and one or more actions attached to it. The criteria determine whether the rule qualifies, and the action specifies what the rule does.

You can create a hierarchy of nested rules to create rules with multiple criteria and multiple actions.

Oracle Loyalty uses these records as follows:

- Rules. When Oracle Loyalty finds a rule that qualifies (meaning all of its criteria validate to true), it executes that rule's action.

- Criteria. Loyalty evaluates criteria as true or false. If the criteria are related using a logical AND, then the rule qualifies if all the criteria are true. If the criteria for a rule are related using a logical OR, then the rule qualifies if any of the criteria is true.
- Actions. If a rule qualifies, Oracle Loyalty executes the Then action for that rule. If a rule doesn't qualify, Oracle Loyalty executes the optional Else action for that rule.

To enter rules for a loyalty promotion

1. Open the required promotion.
2. If the promotion form's Active check box is selected, then deselect it.
3. Click the Manage Rules button.
4. In the Manage Rules screen, click the Create New Rule button, and complete the necessary fields.
5. Create Criteria and Actions for the rule.

Create Criteria and Actions for Promotion Rules

The criterion of a rule is a conditional statement that Oracle Loyalty evaluates as true or false.

Rules can have one or more criteria. If you use more than one criteria, you can connect them using a logical OR, so the rule qualifies if any one criteria is true, or using a logical AND, so the rule qualifies only if all criteria are true.

There are the following types of criteria:

- Compare to Value. Compares an attribute to a value. For example, you can determine whether the value in a specific field is greater than 1000. If so, then the criterion evaluates to true, and the member receives the bonus that's defined as the Action list for this promotion.
- Compare to Attribute. Compares an attribute with another attribute. For example, you can determine whether the value in a specific field is greater than the value in another field. If so, then the criterion evaluates to true, and the member receives the bonus that's defined in the Action list for this promotion.

Note: Before doing this procedure, you must create the attributes used in the rule.

To create criteria and actions:

1. Open the required promotion.
2. If the promotion form's Active check box is selected, then deselect it.
3. Click the Manage Rules button.
4. Click the Create New Rule button.
5. In the If box create a new condition:
    a. In the Attributes panel, expand the categories until the individual attributes display.
    b. Drag an attribute name to the If box. Alternately, press tab to move to the New Condition field, click Enter, and type the name of the attribute.

        The Create Condition dialog box appears, with this attribute entered.
    c. Select a comparison operator.
    d. Use the dialog box icons to specify whether you're comparing with a value or an attribute.
    e. Enter the value or the attribute.
    f. If you entered an attribute, you can also create a calculation based on this attribute by clicking the Add Arithmetic icon.

        After you add an attribute, the AND and OR areas appear.

6. Optionally, If a more complex condition is needed, create more conditions in the AND or OR areas, repeating Step 5 for each added condition.
7. Create actions for the rule:
   a. Click the Actions tab.
   b. Drag actions to the Then box. Alternately, press Tab to move to the New Action button, press Tab to move to the Perform and Action option, press Enter, and type the name of the action to bring up the Create Action dialog.
      These actions will be executed if the rule qualifies.
   c. Optionally, create additional actions to the Else box.
      These actions will be executed if the rule doesn't qualify.

Create Incentives for Enrollment Promotions

Oracle Loyalty program administrators can create a choice of incentives for member promotions. For example, a promotion may reward a member with the choice of either 10,000 loyalty points, a free return airline ticket, or access to a airline lounge for one year, if the member flies 10,000 airline miles in a specific month.

To create incentives for a promotion, do the following:

1. Open the required promotion.
   Select the Enrollment Required check box.

   > **Note:** The Enrollment Required check box must be selected to create incentive choices.

2. Click the Incentive Choices icon.
3. In the Incentive Choices screen, click Add Incentive Choice.
4. Add one or more records to the Incentive Choices list and complete the necessary fields.

   > **Note:** Each incentive choice name must be unique within each promotion. The values you enter in both the Incentive Choice and Description fields are displayed when the member enrolls in the promotion.

5. Select a default incentive choice.
6. Click Save and Close.

Set Up a Voucher Redemption Promotion

If you plan to reward customers with vouchers, you must define a voucher redemption promotion for each voucher product. Each voucher redemption promotion requires a reference to the program-level attribute for the voucher number.

To create a voucher redemption promotion:

1. Open the required program.
2. Create a transaction attribute for the voucher number. You could call it Transaction Voucher Number or something similar.
3. Open the Promotions screen and create a new promotion.

4. Complete the necessary fields for a redemption promotion.
5. In the rules, create a Redeem Voucher action. It must reference the voucher number attribute, for example: IF [Transaction Voucher Number] isn't blank THEN DO Redeem Voucher Voucher: [Transaction Voucher Number].
6. Save the promotion.

Activate and Deactivate Promotions

You control whether a promotion is applied to transactions by activating or deactivating it. A promotion applies to transactions only if both of the following are true:

- The transaction's date is within the promotion's start and end date period.
- The promotion is active.

> **Note:** Keep a promotion active as long as it applies to transactions, which might be past the promotion's end date. For example, if the business rule is that members can submit transactions for up to six months after the transaction's date, then all promotions must remain active for six months after the promotion's end date.

Activate a Promotion

After you have finished creating a loyalty promotion, you must activate it, which:

- Makes all fields on the promotion and all information about the promotion read-only.
- Makes the promotion apply to transactions.
- Makes the promotion visible to Oracle Loyalty users.

To activate a promotion:

1. Open the required promotion.
2. Select the Active check box to activate the promotion.

Deactivate a Promotion

You can deactivate a promotion so it's no longer available to users. When you deactivate a promotion, the promotion can't generate extra rewards for members, and it's not visible to users.

To deactivate a promotion:

1. Open the required promotion.
2. Deselect the Active check box to deactivate the promotion.

Examples of Criteria for Promotion Rules

Examples of Rule Criteria for Redemption Promotions

To create rules for the redemption promotions, you must define the criteria and actions that are triggered when the criteria are satisfied.

Here are some examples of rule criteria for redemption promotions.

Name	Compare Type	Object	Attribute	Operator	Value
If member is Gold or Platinum Tier	Compare to Value	Member	Status	Equals	Gold
If Destination is JFK or LAX	Compare to Value	Transaction	Arrival Airport	Equals	JFK, LAX
If Flight isn't on the weekend	Compare to Value	Transaction	Date of Activity	Does Not Equal	6, 7
If Flight Date > 31-Aug-2017	Compare to Value	Transaction	Date of Activity	Is Greater Than	31-Aug-07
Check Points	Compare to Value	Transaction	Transaction Points	Is Greater Than	0
If product is Elite of the Day	Compare to Value	Transaction	Product Name	Equals	Elite of the Day

Examples of Rule Criteria for Calendar Promotions

To create rules for the calendar promotions, you must define the criteria and actions that are triggered when the criteria are satisfied.

Here are some examples of rule criteria for calendar promotions.

Name	Compare Type	Object	Attribute	Operator	Value
Transaction Hour Noon To 4	Compare to Value	Transaction Field. Transaction Date	Hour	between	12:00 PM to 4:00 PM
Transaction Day Wednesday	Compare to Value	Transaction Field. Transaction Date	Day Name	Equals	Wednesday
Transaction Date Thanksgiving 2017	Compare to Value	Transaction Field. Transaction Date	Date	Between	November 23 2017 to November 26 2017

Note: The Between operator doesn't include the start value or the end value when it performs a condition check. For example, if you have a condition where the transaction is between 12:00 PM and 4:00 PM, then the condition check is performed between 12:01 PM and 3:59 PM.

Examples of Rule Criteria Based on Promotion Attributes

This topic includes examples of rule criteria based on promotion attributes evaluated during transaction processing and after transaction processing. To create rules, you must also define the actions that are triggered when these criteria are satisfied.

Here are some examples of criteria evaluations during transaction processing.

Name	Compare Type	Object	Attribute	Operator	Value
If Reward for Home financing is > 25000	Compare to Value	Promotion	Home Financing Reward	Is Greater Than	25000
If Bonus not given already (Used to avoid giving duplicate rewards for the same promotion)	Compare to Value	Promotion	Reward given indicator	Does Not Equal	Y
If First Activity	Compare to Value	Promotion	First Activity Indicator	Does Not Equal	Y
If Big Mart tax number isn't already accounted for	Compare to Value	Promotion	Big Mart tax number indicator	Equals	N

And here are some examples of criteria evaluated after transaction processing, which occurs because they use the value of a promotion attribute. Because the criteria are evaluated after the transaction, they catch changes in the attribute that might have occurred during processing.

Name	Compare Type	Object	Attribute	Operator	Value
# of Standard Days Rented is greater than 50 days	Compare to Value	Promotion	# of Standard Car Days Rented	Greater Than	50
Check for 5th Visit	Compare to Value	Promotion	Visits	Equals	5
If # 1st Class flights in 2017 = 10	Compare to Value	Promotion	# of 1st class flights on KA Sub	Equals	10

Name	Compare Type	Object	Attribute	Operator	Value
If Reward for Home financing is > 25000	Compare to Value	Promotion	Home Financing Reward	Is Greater Than	25000
Check Accumulated Stars	Compare to Value	Promotion	Accumulated Stars	Is Greater Than or Equal To	12
If # of Referrals >=5	Compare to Value	Promotion	# of Referrals	Is Greater Than or Equal To	5
If Reward for Home financing is <= 25000	Compare to Value	Promotion	Home Financing Reward	Is Less Than or Equal To	25000
If member has used service for 12 months	Compare to Value	Promotion	Bill Counter	Equals	12
If average Billing > 400	Compare to Value	Promotion	Average Bill	Is Greater Than or Equal To	400
If # of times package bonus given <3	Compare to Value	Promotion	# times package bonus given	Is Less Than	3
If 365-day bonus not given already	Compare to Value	Promotion	365-day bonus given indicator	Does Not Equal	Y
If Incentive isn't already issued	Compare to Value	Promotion	Incentive 1 issued	Equals	N
If Last Partner is Big Mart	Compare to Value	Promotion	Last Purchased Partner Name	Equals	Big Mart
If Last Product Purchased was a Baby Product	Compare to Value	Promotion	Last Purchased Product Category	Equals	Baby Product
If Last Transaction was in 2015	Compare to Value	Promotion	Last Transaction Year	=	2015

Examples of Rule Criteria Based on Member Field Attributes

To create rules based on member field attributes, you must define the criteria and actions that are triggered when the criteria are satisfied.

Here are some examples of rule criteria for promotions based on member field attributes.

Name	Compare Type	Object	Attribute	Operator	Value
If dollars spent at Big Mart in 2017 >= 10000	Compare to Value	Member	Dollars spent at Big Mart	Is Greater Than or Equal To	10000
If membership tenure >= 30 days	Compare to Value	Member	Membership Tenure	Is Greater Than or Equal To	30
If member is in Elite tier	Compare to Value	Member	Premium Recognition Status	Equals	Elite
If Member's country is USA	Compare to Value	Member	Country	Equals	USA

Examples of Rule Criteria Based on Member Tier Attributes

To create rules based on member tier attributes, you must define the criteria and actions that are triggered when the criteria are satisfied.

Here are some examples of rule criteria for promotions based on member tier attributes.

Name	Compare Type	Object	Attribute	Operator	Value
If Member is Gold or Platinum Tier	Compare to Value	Member Tier	Tier	Equals	Gold or Platinum
If Tier Status is Active	Compare to Value	Member Tier	Member Tier Status	Equals	Y
Check QF balance>1000	Compare to Value	Member Tier	Point A Qualifying Point	Is Greater Than	1000

Examples of Rule Criteria Based on Transaction Attributes

To create rules based on transaction attributes, you must define the criteria and actions that are triggered when the criteria are satisfied.

Here are some examples of rule criteria for promotions based on transaction attributes.

Name	Compare Type	Object	Attribute	Operator	Value
If Flight Transaction	Compare to Value	Transaction	Product	Equals	Flight
Amount > 200	Compare to Value	Transaction	Amount	Is Greater Than	200
Check for Amount Spent	Compare to Value	Transaction	Amount	Is Greater Than or Equal To	100
Check Amount	Compare to Value	Transaction	Amount	Is Not Empty	(Not applicable)
If Class is First	Compare to Value	Transaction	Ticket Class	Does Not Equal	A, F, P
If Destination city isn't LA	Compare to Value	Transaction	Destination City	Does Not Equal	Los Angeles
If time of shopping is after 10 pm	Compare to Value	Transaction	Hour	Is Greater Than or Equal To	10
If time of shopping is before 6 am	Compare to Value	Transaction	Hour	Is Less Than	6
If Date of Activity is > Dec 31, 2017	Compare to Value	Transaction	Date of Activity	Is Greater Than	12/31/2017
If Location is outside the US	Compare to Value	Transaction	Location Code	Contains	DFC_INT
Location Code Shared	Compare to Value	Transaction	Location Code	Is Not Empty	(Not applicable)
Quantity >=2	Compare to Value	Transaction	Order Quantity	Is Greater Than or Equal To	2
Vision Corporation Transaction	Compare to Value	Transaction	Partner Name	Equals	Vision Corporation

Name	Compare Type	Object	Attribute	Operator	Value
Transaction points >0	Compare to Value	Transaction	Transaction Points	Is Greater Than	0
Transaction points >=500	Compare to Value	Transaction	Transaction Points	Is Less Than or Equal To	500
Check Product	Compare to Value	Transaction	Product Name	Equals	Green NB- 2LH / Lithium- Ion Battery Pack
Check Social Interaction Check-in	Compare to Value	Transaction	Social Action Type	Equals	Check-in
Check Social Interaction (Share / Tweet / Like	Compare to Value	Transaction	Social Action Type	Equals	Share, Tweet, Like
Online Booking	Compare to Value	Transaction	Transaction Channel	Equals	Web

View and Download Promotions at a Glance

Oracle Loyalty managers and administrators can quickly download and view information about all active promotions in a loyalty program. The downloaded file is in Rich Text Format (.rtf) and provides the following information:

- Promotion Name
- Promotion Attributes
- Promotion Rules

Note: To view the promotions report at promotions-level, the promotion can be either active or inactive, however to view the promotions at programs-level, the promotion must be active.

To view or download the Promotions at a Glance report at program-level:

1. Open your program.
2. On the Edit Program page, select Download Promotions report from the Actions list.
3. Save or open the file.

To view or download the Promotions at a Glance report at promotions-level:

1. Open your promotion.
2. On the Edit Promotion page, click the Promotion Rules at a Glance icon.
3. Click Download.
4. Save or open the file.

Modify Promotions

If you have already activated a promotion and you want to modify the promotion, first you must deactivate it.

To modify a promotion:

1. Open your promotion.
2. In the Edit Program screen, deselect the Active check box to deactivate the promotion.
3. Enter data in the same way you do when you create promotions.
4. When you're done, in the Edit Program view, select the Active check box to activate the promotion.

Create Enrollment Promotions

Enrollment promotions require members to be enrolled in the promotion.

Create an enrollment promotion to target a specific audience, making it possible to measure the effectiveness of the promotion at converting incremental sales or change in member behavior, independent of coincidental promotion criteria fulfillment.

Any type of promotion can require enrollment, which you specify while creating the promotion.

Program managers and administrators can add members to promotions in the following ways:

- Select individual members to enroll in an enrollment promotion.
- Import members to an enrollment promotion in a group using an Excel spreadsheet or a CSV file.

To create an enrollment promotion:

1. When creating a new promotion, check the Enrollment Required option on the Edit Promotion page.
2. Specify a start date and, optionally, specify an end date.
3. To add program members to the enrollment promotion:
    - To add members one at a time, click Add Member and select a member name.

      (Optional). Choose an incentive choice for this member's promotion. If you don't select an incentive choice, then the default incentive choice is assigned to this member's promotion. For additional details, see the topic Create Incentives for Enrollment Promotions.
    - To import multiple members to an enrollment promotion at one time, create an Excel spreadsheet or a CSV file with the member numbers, and then click Import Members on the Edit Promotion page. Member numbers must already be enrolled in the loyalty program.

To enroll a program member in one or more enrollment promotions:

1. In Loyalty Members open the loyalty member, and click the Promotions Enrolled icon.
2. Click Enroll In Promotion, and choose the promotion.
3. (Optional). Choose an incentive choice for this promotion.

   If you don't select an incentive choice, then the default incentive choice is used in this promotion. For additional details, see the topic Create Incentives for Enrollment Promotions.
4. Use the promotion enrollment API.

Transfer Points in Promotions

Loyalty program members can transfer points to other members in the same loyalty program, for example, if a member is short of points, and wants to borrow points from another member.

To transfer points to another member:

1. Open your promotion.
2. In the Edit Promotion view, update the following fields:
    - For the Type, select Redemption.
    - For the Sub Type, select Transfer Points.
3. Click the Save and Close button.
4. In the Edit Promotion view, click the Manage Rules button.
5. In the promotion rule criteria, ensure that the Transaction Sub Type is equal to Transfer Points.
6. In Actions, select the Transfer Points action.
7. Click Save and Close.

4 Manage Program Members

How You Set Up Members

After the loyalty manager has set up programs and promotions, you can add program members. To set up loyalty members, you must be either a Loyalty Program Administrator or a Loyalty Program Manager.

Let's look at the general steps involved in setting up members.

Step	Description	Topics Where You Can Find More Information
1	When you enroll a member in a program, the member is automatically enrolled in all active promotions, except for enrollment promotions, in the program. Enrolled promotions are excluded from automatic enrollment because these require manual enrollment. The member automatically is in the default tier for the program.	Enroll Members in Loyalty Programs
2	If you have created a company member, you can view the employees of the company, if you have already added them.	Add and View Employees of Company Members
3	If you have created an individual member, you can view the all the companies that the individual is associated with.	View Information About Members
4	You can view and add accounts for individual members.	Add and View Company Accounts of Individual Members
5	You can add an individual member to a household and specify whether earned points roll up to the household.	View and Add Members to a Household

Data Masking Loyalty Member Names

Data masking, also known as static data masking, is the process of permanently replacing sensitive data with fictitious yet realistic looking data. It helps you generate realistic and fully functional data with similar characteristics as the original data to replace sensitive or confidential information. In Oracle Loyalty Cloud, data masking is applied to loyalty members' names by default. For more information on data masking, see Using Oracle Data Safe guide on the Help Center (docs.oracle.com/en/cloud/saas/).

Enroll Members in Programs

When you enroll a member in a program, the member is automatically enrolled in all active promotions in the program. The member is automatically in the program's default tier. Program managers and administrators can add members to enrollment-required promotions as well.

Enrollment is often done in the customer-facing application, rather than in Oracle Loyalty. To make this possible, you must use the REST API to integrate Oracle Loyalty with the customer-facing application.

Loyalty programs have the following types of members:

- Individual. People join programs on their own behalf and make purchases themselves to earn points. This type of membership supports business-to-consumer promotions.
- Household. You can create a Household member, and then associate individual members with the household. A Household member provides a way to roll up points earned by individual members of a household as a family or community.
- Company. Companies join programs. When employees of the company make purchases, they can earn points for the company and for themselves. This type of membership supports business-to-business promotions.

To enroll a member in a loyalty program

1. Open Loyalty Members.
2. On the member screen, click Create Member and complete the necessary fields:
    - Individual. To create an individual member, choose Individual in the Type field and choose an existing Contact or create a new Contact.
    - Household. To create a household, choose Household in the Type field, then select a primary contact, specify a household name, and specify the address details.
    - Company. To create a company member, choose Company in the Type field, choose an existing Account in the Account field or create a new Account, and choose your primary contact at the account in the Contact field. In addition, in the Accrual Type field, choose one of the following:
        - Individual Only. Select this if you want only employees to be able to earn points.
        - Both. Select this if you want both employees and the company to earn points.

        > **Note:** In addition to choosing the value in the Accrual Type field, you must create the promotions that award points to the employee and optionally to the company.

Add and View Employees of Company Members

If you have created a company member, then you can add, or associate, employees with the company. You can then view a list of employees that are associated with the company.

To view and add employees of company members

1. Open Loyalty Members.
2. Click the name of the company member.
3. Click the Employees icon.

A list of employees appears.

4. To add a new employee, click Add Employee and complete the necessary fields.

View and Add Members to a Household

Oracle Loyalty lets you create a member of type Household to pool earned points of individual members belonging to the same family or community, and redeem the points according to the objectives of the household only.

Membership in a household allows individuals, also called child members, to choose whether their earned points (qualifying and non-qualifying) roll up to the household or accrue to the individual member only. This provides the flexibility to retain accrued points for personal use or release the points for group use.

> **Note:** When you select the Accrue to Household option for a member, all points accrued roll up only to the household, with no option for partial assignment of points to both member and household.

Once you associate an individual member to a household and set the option to accrue points to the household, all existing points will remain with the individual, but the points earned after the association will roll up to the household. Qualifying points and lifetime points display for both the individual and household members, but accrue to the household.

A child member can't already be a member of another household.

You can add members to a household in two ways:

- For a household member, either select individual members to associate with the household, or create new members to automatically activate and associate with the household.
- For an individual, choose a household to join, and set the option to accrue points to the household.

To add individual members to a household

1. Open Loyalty Members.
2. Associate individual members at either the household or individual level:
    - Household - Search for the name of the household member, and then click the Individuals icon. Search for and select individual program members. If a member doesn't yet exist, click the Add Individual button and enter the required details. Specify the start date if you don't want to use the system date. Then go to the member page for each individual member, and set the Accrual to Household option.
    - Individual - Search for the name of the individual member that you want to add to the household. On the Edit Member screen, select the name of the household to join, and set the Accrual to Household option.

To view a list of members in a household

1. Open Loyalty Members.
2. Search for the household.
3. Click the Members icon.

To change point accrual back to the individual member

1. Open Loyalty Members.
2. End point roll-up at either the household or individual level:
    - Household - Search for the household member, click the Members icon, and then specify an end date to expire point roll-up for the individual.
    - Individual - Search for the individual member, and then remove the Accrual to Household option.

> **Note:** When you set the Accrue to Household option, 100% of points roll up to the household; there's no option to partially roll up points.

Add and View Company Accounts of Members

If you have created an individual member, you can view the all of the companies with which the individual is associated.

The individual may be associated with one or more companies. For example, an individual member may be associated with two companies if the member works part-time for two businesses, and both businesses are in an airline loyalty program.

To view and add employees of company members:

1. Open Loyalty Members.
2. Click the name of the individual member.
3. Click the Company icon.

   A list of companies appears.
4. To add a new company, click the Add Company button and complete the necessary fields.

View Information About Members

A list of members is displayed on the Loyalty Members page. Here you can search for a member by name, sort members' names alphabetically, or filter the list of members by using refined search criteria. On this page, you can also search for a specific member based on a membership card number. To enable the Membership Card Search button, and for more information on extending your Loyalty program, see the Oracle Loyalty Extending Guide.

When you click on a member's name, you can view the following information:

- Profile: The member's name, type, program, point balances, member attributes, and other details.

  > **Note:** You can add and organize supplementary member information on the Member Profile page by using field groups to categorize and display member attributes. For more information, see the Field Groups chapter in Oracle Applications Cloud Configuring Applications Using Applications Composer.

- Tier: The current tier, all the past tier changes for the member, the next qualifying tier, and the number of points required for the next qualifying tier.
- Transactions: All past transactions for the member. Clicking on a transaction takes you to the Transaction page, where you can copy, cancel, or process the transaction.
- Referrals: All referrals the member has made.
- Point Items: Details about how many points a member got because of a specific transaction, the promotion that triggered the points, when the points will expire, and so on.
- Promotion Attributes: If a Member has enrolled in a promotion and has at least one qualifying transaction for the promotion, then the attribute appears in this view. In addition to using attributes in rules, you can use them to track many types of behavior, such as the number of flights a member took, the number of times a member purchased a specific product, and the number of nights a member stayed in a hotel. For marketing purposes, you can see all attributes that are being tracked for a given member and see the member's progress against these attributes.

- Vouchers: All the vouchers the member has available and that the member has used.
- Membership Cards: All the membership cards the member has.
- Household Information: The name of the household that the member is part of, if any, and whether points earned accrue to the household.
- Company: If the member belongs to a company, then company information appears in this view.
- Enrollment Promotions: All the promotions in which the member is enrolled (enrollment promotions only).

To view information about a member:

1. Open the Edit Member page for your member.
2. Click a tab to view member information:
   - Tier
   - Transactions
   - Referrals
   - Point Items
   - Promotion Attributes
   - Vouchers
   - Membership Cards
   - Company
   - Promotions Enrolled

Related Topics

- Attributes for Promotions
- Create Incentives for Enrollment Promotions

View a Member's Qualifying Points

You can check how many qualifying points a member currently has, how many more they need to qualify for a tier upgrade, and details about how they earned the point grants.

To view a member's qualifying point information:

1. Open Loyalty Members.

   The points shown on this page are a member's total available points, which include qualifying and other points and can be used for redemptions.
2. Click the member's name.
3. Click Profile to view the member's total qualifying points, available, future, and lifetime points for each point type.
4. To view details about the member's current tier, such as the number of qualifying points they need for an upgrade, click Tier.
5. To view chronological details about point grants the member received, click Point Items.

Note: Members earn tier upgrades in real time from program promotions. The Loyalty Batch Engine Main Job, when configured for the tier attribute, handles tier re-qualify or tier downgrades. For details, see Overview of Batch Processing.

For more information about qualifying points, see Loyalty Points.

Related Topics

- Overview of Batch Processing
- Loyalty Points

Create Members' Referrals

You can give members rewards for referring other people who become members. You can view a list of all the referrals made by the member, and you can use the same screen to create a new referral record.

> **Note:** You can also create referrals when you enroll new members, by selecting the referring member in the Referred By field.

To create a member's referrals:

1. Open Loyalty Members.
2. Open the Edit Member page for your member.
3. Click the Referrals icon.
4. Click the Create Referral button and complete the necessary fields.

Assess a Member's Tier

You can perform tier assessment on a loyalty program member to determine whether the member's tier qualifying balance is sufficient to re-qualify the present tier, upgrade the tier, or downgrade the member's tier (often for development or demonstration purposes). Tier assessment displays details about the next tier a member can achieve, including the next tier name, number of qualifying points required for that tier, the number qualifying points the member currently has, the number of qualifying points still needed to upgrade, and the tier qualifying end date (Till Date). To use the tier assessment feature, a tier assessment model must be defined in the tier class attributes.

Typically, tier assessment and upgrades occur automatically at runtime when a member acquires enough qualifying points. The Oracle Loyalty engine checks the member's qualifying point balance and the promotion rules, and upgrades the member with a tier promotion action if the point balance is sufficient. Similarly, the Oracle Loyalty engine can downgrade or requalify a member's tier at the tier end date.

You can cancel transactions that qualify members to upgrade to higher tiers without affecting a member's tier status. For example, a member upgrades to a higher tier by earning sufficient qualifying points through transactions, but those transactions are later canceled. The member's qualifying point balance is deducted; however the member isn't downgraded to their original or previous tier.

To assess a member's tier:

1. Open Loyalty Members.
2. Open the Edit Member page for your member.
3. Click the Tier icon.
4. Click Assess Tier.
5. Review the member's tier assessment details.

For details about manually changing a member's tier, see the Change Members' Tiers Manually topic.

Related Topics

- Types of Tier Assessment Models

Change Members' Tiers Manually

Usually, member tiers are changed by promotions when they have accumulated the necessary number of points or some other necessary action needed to qualify for a different tier. These tier changes occur automatically during a batch process. You can also change a member's tier manually, if necessary.

Before changing a member's tier manually, you can optionally perform a tier assessment for a loyalty program member to determine whether the member's tier qualifying balance is sufficient to upgrade to a higher tier. For details, see the Assess a Member's Tier topic.

To change a member's tier manually:

1. Open Loyalty Members.
2. Open the Edit Member page for your member.
3. Click the Tier icon.
4. Click the Change Current Tier button, and complete the necessary fields.

Related Topics

- Types of Tier Assessment Models

Give Vouchers to Members Manually

Members might receive a voucher for a number of reasons, depending on the business model. For example, if a flight was delayed, then all members on that flight might get a voucher for an upgrade on a future flight.

To give a voucher to a member manually:

1. Open Loyalty Members.
2. Open the Edit Member page for your member.
3. Click the Voucher icon.
4. Click the Create Voucher button, and complete the necessary fields.

Create Membership Cards Manually

Usually, membership cards are issued automatically when a member joins a program, or has a tier change, if you associate a card type when defining a tier. A loyalty manager or customer service can also create membership cards manually, and view information about a member's cards. This is useful if members lose their membership cards.

To create a membership card manually:

1. Open Loyalty Members.
2. Open the Edit Member page for your member.
3. Click the Membership Cards icon.
   A list of the member's membership cards appears.

4. Click the Create Membership Card button, and complete the necessary fields on the Create Membership Cards page.

Restrict Transactions According to Membership Status

Loyalty program managers can restrict the accrual and redemption transactions of all members according to their membership status. For example, you may need to restrict all transactions for members in a Merged status until the merge is complete, or, for members whose status is Potentially Fraudulent until validation is complete.

> **Note:** Transaction restriction is applicable only for the transaction types Accrual, or Redemption, and for the transaction subtype Product.

To restrict transactions according to membership status:

1. Open the loyalty program with the restriction.
2. To deactivate the program, click the Active check box.
3. Click the Transaction Restrictions icon.
4. Add a new record to the Transaction Restrictions list and complete the following fields:
    - Status. Select the membership status to which the restrictions apply.
    - Restrict Accrual. If this check box is selected, then members in the selected status don't accrue points for their activities.
    - Restrict Redemption. If this check box is selected, then members in the selected status are unable to redeem points.
5. Click Save.
6. Click the Summary icon.
7. To reactivate the program, click the Active check box.

Merge Members

Overview of Merging Members

You can merge up to five Oracle Loyalty member accounts into another member account. For example, a merge can be useful if someone enrolled in the same program twice by mistake and accrued points in both memberships. A merge combines these two memberships into one, adding the number of points, last transaction, and other information.

During the member merge, there are two kinds of members:

- Remaining Member. The member that remains after the merge. You select this member before you confirm the merge.
- Deactivated Members. The members that don't remain after the merge. Once the merge is complete, the status of the deactivated members changes to Merged and these members can't be merged again.

You must follow these guidelines for the merge to be successful:

- All the members must be enrolled in the same program.
- Member merge is only supported for individual members.

Results of the Member Merge

When you complete a member merge, data from all selected records are merged into the remaining record as follows:

- Points. Oracle Loyalty adds up the Available, Lifetime and Qualifying Points of all members, and it gives the total to the remaining member.
- Last Transaction. Oracle Loyalty compares the dates when the last transaction was processed for all members, and it uses the latest date as the last transaction of the remaining member.
- Transactions, Vouchers, and Membership Cards. Oracle Loyalty gives the transactions, vouchers, and membership cards of all the members to the remaining member. Oracle Loyalty combines the transaction history of all the members into a single transaction history.
- Tiers. Oracle Loyalty allows the remaining member to retain the highest tier or the two tiers. In addition, the member's tier is recalculated based upon the new combined point total at the next regularly scheduled tier recalculation.
- Tier History. Oracle Loyalty gives the combined tier histories of all the members to the ing member. This means that the tier history shows overlapping tiers in the same tier class for the same date.
- Contact-Level Information. For information stored at the contact level, then the following conditions apply:
  - If the same contact was used for all memberships, then Oracle Loyalty keeps the remaining member's information.
  - If different contacts were used and these are individual memberships, then Oracle Loyalty keeps the remaining member's information.
- Enrolled Promotions. All enrolled promotions are combined.
- Member Attributes. During the member merge process, member attributes are merged, however member field attributes aren't. For more information, see the topic Results of Merged Member Attributes.
- Incentive Choices. In the event where different incentive choices are selected in a promotion enrollment, then the data is merged as follows:
  - If the remaining member has enrollments, then the most recent incentive choice of the remaining member's most recent enrollment is selected.
  - If the remaining member has no enrollments, then the most recent incentive choice among the other deactivated members' enrollments is selected.

Results of Merged Member Attributes

During the member merge process, member attributes are merged but member field attributes aren't.

> **Note:** Before you perform a member merge, you must enable the Merge Action field in your Member Dynamic attribute. The Merge Action field defines how the merge dynamic attribute is processed. For more information, see the topics Attributes for Promotions and Create Program-Level Attributes.

By default, the member merge has the following results for member attributes:

- If member dynamic attributes can't be added together, then Oracle Loyalty keeps the attribute value of the remaining member. For example, this applies to member attributes with values such as Yes or No.
- If member attributes can be added together, for example, numeric totals, then they're added.

You can specify how member dynamic attributes are added by selecting values from the Merge Action menu in the Member Dynamic Attributes section of the Program-Level Attributes view. For example:

- If Sum is selected in the Merge Action field, then the merge sums the values for that attribute for all the members and gives the total to the remaining member. This feature is useful, for example, if there's a member attribute to store the number of miles traveled by a member and you want the merge to sum the miles given by all the members and give the total to the remaining member.
- If Standard is selected in the Merge Action field, then the merge gives the remaining member the same value that the remaining member had for this attribute before the merge. This setting is useful, for example, when the attribute is text for which an operation such as Sum has no meaning.

The following table shows data type attributes and their corresponding values in the Merged Action field.

Date Type	Values for the Merge Action Field
Date	Earliest. Replaces date with the earliest date for the attribute. Latest. Replaces date with the latest date for the attribute. Standard. Keeps the date for the attribute that the remaining member had before the merge.
Integer, Number	Maximum. Replaces number with the maximum number for the attribute. Minimum. Replaces number with the minimum number for the attribute. Sum. Replaces number with the sum of the numbers for the attribute for all members. Standard. Keeps the number for the attribute that the remaining member had before the merge.
String	Standard. Keeps the value for the string that the remaining member had before the merge.

Related Topics

- Create Program-Level Attributes
- Attributes for Promotions

Merge Members

To perform a member merge, do the following:

1. Open Loyalty Members.
2. Click Actions, and select Merge.
3. In the members list, select all the members you want to merge while holding down the Shift key.

> **Note:** You can merge up to a maximum of 5 members at one time.

4. Click the Merge Selected button.
5. In the Member Merge window, select the remaining member.

   Oracle Loyalty merges all the selected records into this record.
6. Click the Merge button.

The Members screen displays only the remaining member. The deactivated members' points, vouchers, promotions, member attributes, and referrals are added to the remaining member's existing items. Member field attributes aren't merged.

Note: Deactivated members' records are retained with the Merged status.

Import and Export Member Information Using the Application

Let's say you need to transfer certain Oracle Loyalty information. You can import and export data to and from the database in Comma-Separated Value (CSV) format.

You can:

- Import member and transaction data to Oracle Loyalty during the initial deployment.
- Import data as needed to Oracle Loyalty on an ongoing basis, such as transactions.
- Export member and transaction data from an Oracle Loyalty instance and import it to another application, or another instance of Oracle Loyalty. Exporting programs and promotions is supported.

You can export a member information directly from a Oracle Loyalty member page to a Microsoft Excel spreadsheet. When you open the Edit Member page, you can export specific member data, including:

- Transactions
- Referrals
- Point Items
- Promotion Attributes
- Vouchers
- Membership Cards
- Companies
- Enrollment Promotions
- Service Requests

Exporting member data lets you provide loyalty managers and customer-facing representatives with concisely-formatted data for decision-making, such as resolving accrual disputes or suspected fraud, or for sharing with an end user. You can also share exported member data externally for archiving or for interpreting using separate tools.

To export data for a member:

1. Open Loyalty Members.
2. Open the Edit Member page for your member.
3. Click the required tab to select the type of member data you want to export, such as transactions or vouchers.

4. On the list view, click Export.

Note: For more information on importing and exporting member data, see the Import and Export Management for Loyalty and Understanding Import and Export Management for CX Sales and B2B Service guides. If you want to know more about best practices to help you improve performance in Oracle Loyalty, familiarize yourself with the Oracle Sales Cloud Optimizing Performance (Document 2420396.2) available on My Oracle Support.

Related Topics

- Import and Export Management for Loyalty
- Understanding Import and Export Management for CX Sales and B2B Service
- Oracle Sales Cloud Optimizing Performance (Document 2420396.2)

View a Member's Audit Report

You use audit trail to identify changes to attributes of the Loyalty Member object made using the application pages, web services, or other processes. The audit history shows you how a business object obtained its current value, and lists old and new values. You can view the history, or create an audit report from the Audit History work area, using appropriate duty roles and privileges. When you want to extract a specific audit trail report, you can download the required report using the Oracle BI Cloud Connector Console. For more information, see the section Extract the Data Store for the Loyalty Offering in the Creating and Administering Analytics and Reports for Loyalty guide.

For more information on configuring audit trail, see the Oracle Loyalty Implementing Loyalty and Oracle Applications Cloud Using Common Features guides.

When you need to review a member's audit activity, you can take a look at how and when all these changes were processed. For example, you can look for a change in member status, or the currency conversation rate for a specific member in a certain time period.

Here's how you review a member's audit report::

1. Open **Tools**, and then **Audit Reports**.
2. Set the filters for the audit report:
    - Date
    - User
    - Product
    - Event Type
3. Click **Search**.

5 Manage Transactions

Overview of Oracle Loyalty Transactions

Setting up loyalty transactions can be done only by a Loyalty Program Administrator or a Loyalty Program Manager. Transactions are any actions that accrue (earn) or debit (burn) points for a member. This chapter describes how to create different types of transactions.

Let's look at the three types of transactions you can use.

Transaction Type	Description
Accrual Transaction	This transaction occurs when the member performs some activity that earns points. Points are accrued by purchasing products from the host organization, from partners, or when an administrator credits points manually. Some examples are, accruing points for flying between specified cities, staying in a hotel chain, or purchasing certain products. Accrual transactions are also used for other activities, such as giving members enrollment bonuses and referral bonuses. You, or a member, can also manually create an accrual dispute transaction. There are two types of Accrual dispute transactions: an Incorrect Accrual for a processed transaction, or a Missing Accrual for a missing transaction.
Redemption Transaction	This transaction occurs when the member redeems or exchanges points with the host partner for a reward. Points are debited from the member's account when they're exchanged for a product, service, upgrade, or when an administrator debits points manually. If you use the Redemption REST API to set up member self-service, points are renewed through self-service.
Point Transfer Transaction	This transaction occurs when the member transfers points to, or receives points from, another member within the same loyalty program. You can only enter Point Transfer transactions using the Member page, and not the Transactions page.

Integrated point-of-sales systems automatically create transactions. However, you can also manually create transactions directly within Oracle Loyalty. Batch jobs handle transactions by using their own criteria to search for all appropriate transactions with Queued status. These transactions are then processed one by one.

> **Note:** If you need to expedite an individual transaction, you can do this by manually changing its status to Queued in the UI. But, you can only do this for transactions with In Progress status. The batch engine then picks up and processes these Queued transactions according to its next scheduled run and load setup. For details, see Expedite a Transaction.

Related Topics

- Overview of Batch Processing

Create a Transaction

Integrated point-of-sales systems automatically create transactions. But you can also manually create transactions directly within Oracle Loyalty.

1. Open Transactions.
2. Click Create Transaction.
3. Complete the necessary fields.
4. Click Process and you're done.

View a Transaction

As you work in your loyalty program, you need to view transactions so that you can analyze customer activity, or so that you can answer customer questions. Even resolve complaints. You have the choice to view either all transactions, or just the transactions for a specific member.

Here's how you view transaction information:

1. Open Transactions.

   Here, you can see all members' transactions. If you want, click the List menu to filter the transactions, for example, Transactions Created Today.
2. Click the transaction number to see the details of a specific transaction.

Let's look at how you view a specific member's transactions:

1. Open Loyalty Members, and then Edit Member page for your member.
2. Click Loyalty Transactions.

   Here you can see all transactions for that member.
3. If you want to locate a transaction using specific search criteria, select each criterion from the Add menu.

Expedite a Transaction

You have the option to expedite a transaction. You can do this for any transaction with a status of In Progress. You just need to change the status to Queued. The next appropriate batch job then picks up this transaction along with other Queued transactions and processes it the same way.

Here's how you expedite a transaction.

1. Open Transactions, and select the In Progress transaction you want to expedite.
2. Change the status from In Progress to Queued.
3. Click Save.

Redemptions

When members have accumulated a certain number of points, it makes sense to exchange these points for products offered by the program host or by partners. Some redemptions offered might be airline flights, hotel bookings, car rental, or upgrades to first class on existing travel tickets. An example of redemption pricing could be 50,000 points for a day's car rental in Palo Alto, or 70,000 points for an overnight hotel stay in Pleasanton.

It can happen that a member wants to redeem a product, but can't because there are insufficient points to complete the redemption. If you want, you can allow negative points on the membership program. Select the Allow Negative Points check box in the Edit Program screen, and it's done. This way, the member doesn't miss out on the redemption, and the next accrual activity pays back the negative points.

Here are some types of redeemable products.

- Redemption for a tangible product. A member redeems points in exchange for an item available in online stores, or redeems a gift voucher in a retail store. In the case of an online store, the member adds the product to the shopping cart and the online retailer offers a quotation in points. If the member accepts, Oracle Loyalty debits the points from the member's account.
- Redemption for a service. A member redeems points in exchange for an award certificate or voucher for complimentary use of a service at a later date, like a hotel stay, or a car rental. The member receives the voucher or award certificate from the loyalty program, and uses it at any future date before the voucher expiry date.
- Redemption for a flight. A member redeems points in exchange for airline tickets to specific destinations. If you want to define pricing for flight redemptions, you must create a separate product for the originating and destination city. You also need to separately define the redemption pricing in points for each of those products.

Related Topics

- Define Negative Point Limits for Tiers
- Create a Program

Voucher Redemptions

Let's break down how customers use vouchers, and go over how they're used in Oracle Loyalty.

Vouchers are used to redeem services, such as staying at a hotel, renting a car, or for the exchange of retail products. Vouchers can also offer a percentage discount or an absolute monetary value toward product purchases. Keep in mind that you must use a point-of-sales system to redeem vouchers. So if your business model requires vouchers, then you must integrate Oracle Loyalty with your point-of-sales system.

Suppose you have a member who has a voucher for a hotel chain and wants to redeem it for an overnight stay. The member checks in, presents the voucher, and the hotel validates the voucher number in Oracle Loyalty. When the member checks out, the hotel updates the voucher status to Used.

If you intend to use vouchers, you must define a voucher redemption promotion for each voucher product you grant. For details, see Set Up a Voucher Redemption Promotion.

Voucher Expiry

Every voucher has an expiry date, which is determined during set up when you create the voucher product.

To validate a voucher, Oracle Loyalty checks the date of activity against the expiry date of the voucher. If the date of the activity occurs after the expiry date, it rejects the voucher.

It's possible that a member could use a voucher before its expiration date, but this information isn't sent to Oracle Loyalty until after the voucher's expiration date. What happens then? To handle this, Oracle Loyalty extends the expiration period, allowing the voucher to completely expire the revenue against the voucher to be recognized. This is the amount of time after the expiration date when the voucher can still be used. If the voucher isn't used within this time period, then the voucher's status changes to Expired, and the revenue is recognized. After a voucher is used, it can't be expired for revenue recognition.

Voucher Status

Here are statuses your vouchers can have.

- Available. Oracle Loyalty issues the voucher to the member.
- Canceled. The member returns the voucher to the loyalty program operations to invalidate it.
- Used. The member presents the voucher for the partner product or service. For a voucher to be considered used, the partner must confirm the voucher's availability.
- Expired. The revenue of a voucher is recognized for a defined time period from the expiry date.
- Closed. The voucher is closed and can't be used.
- Reissued. A voucher is reissued when another voucher is issued in its place. A voucher can be reissued only if has Available or Reserved status. Let's say voucher V1 goes into Reissued status, and a second voucher, V2, is issued in its place. When this is completed, the status of V1 is Reissued, and the V2 status is either Available or Reserved. Voucher V2 contains a reference to the original voucher, V1.

Household Transactions

Household transactions use the total points earned by individual members of a household.

Let's say you assign an individual member to a household, and you select the Accrue to Household option. Here are the transaction scenarios that can occur:

- The individual member earns points. The roll-up to the household creates a Redemption-Auto Accrual transaction for the individual member, and a corresponding Accrual-Auto Accrual transaction for the household.
- An accrual transaction is canceled for an individual member. The roll-up to the household is also canceled, and both qualifying and non-qualifying points are redeemed from the household balance.
- Any attributes and vouchers also roll back on the individual. Vouchers and attributes don't roll up to the household.
- If the individual is associated with both a company and a household, then the points the individual earns from company transactions also roll up to the household.

Lifetime and qualifying point balances display at the individual member level.

Company Transactions

Company transactions use the points earned by companies who join programs as members. When company employees make purchases as program members, they earn points for only themselves. Alternatively, they can choose to share a portion of their earnings with the company. This supports business-to-business promotions.

A company member in a loyalty program can select these accrual types:

- Individual Only. Employee retains all the earnings.
- Both. Both employees and the company distribute points between themselves based on the promotion.

Here are a few things to keep in mind. Depending on the information referenced in an individual member's data, you can't create certain transactions. For example, let's say an individual loyalty member is associated with a company member and the accrual type for the company member is Individual Only. If the individual member's transactions are of type Accrual and Subtype Product, and if the individual member has a company reference provided in the transaction, the loyalty engine won't create a company transaction.

However, you can create this transaction if the individual loyalty member is associated with a company member and the accrual type for the company member is Both. In this scenario, you set the Type field for this transaction to Accrual, and the Subtype field to Company.

If you want to award points to both the employee (the individual member) and the company, then you need to create promotions with these criteria:

- Set the Type field for the Promotion to Accrual, and the Subtype field to Product. This assigns points to the individual member.
- Set the Type field for the Promotion to Accrual, and the Subtype field to Company. This assigns points to the company member.
- In the Company Reference field in the Transaction Attribute view, name the company that accrues points in addition to the loyalty member.

This creates two separate transactions, one for the individual member and one for the company member.

Create a Redemption Transaction

Use a redemption transaction when you redeem points in exchange for products or services. Keep in mind that you carry out these transactions on your selected member profile page, and not on the Transaction page. On the member profile page you can select a suitable product for the member's available points, and you can create redemptions for customers on the phone, or for those you're talking to in person.

Here's how you create a redemption:

1. Open Loyalty Members, and then the Edit Member page for your member.
2. Click Profile and then Redeem Points.
3. Complete the necessary fields.
4. Click Process and you're done.

Create a Point Transfer Transaction

Suppose a loyalty program member wants to transfer non-qualifying points to, or to receive non-qualifying points from, another member of the same program. In this scenario you use a point transfer transaction. Keep in mind that you can only transfer non-qualifying points, and these are transferred using only the Transaction page. Qualifying points are non-transferable and must be earned by each program member.

Here's how we create a points transfer transaction.

1. Open Loyalty Members, and then the Edit Member page for your member.
2. Click Profile and then Transfer Points.
3. Select the member who will receive the points transfer, as well as selecting the point type, and the number of points to transfer. If you want, you can add a comment.
4. Click Process and you're done.

> **Note:** Another way to do to this is by using a REST API. You can transfer points by providing the correct transaction type, subtype, and receiver member detail. For more information, see REST API for Oracle Loyalty.

Transaction Cancellations

It's likely that you might need to cancel a processed transaction that's no longer needed. It's a good idea to identify and configure the reversal actions that occur after you cancel a processed transaction. Keep in mind that:

- When you cancel an accrual transaction, this results in a redemption transaction.
- When you cancel a redemption transaction, this results in an accrual transaction.

Oracle Loyalty uses the transaction subtype Cancellation on all reversal (cancellation) transactions.

When you set up your loyalty program, you must create a promotion for each type of cancellation transaction. This sets up the particular reversal actions your loyalty program must take. You can name these promotions Accrual Cancellation and Redemption Cancellation, for example. The promotion rule criteria look for the Reversal Transaction type and Cancellation subtype attributes (which you must define), and then apply the actions you choose.

For your Accrual Cancellation promotion, keep these promotion actions in mind when creating the promotion rule.

- Cancel Attribute. If you use an attribute to track a member's spending for an upgrade, then you can specify whether to reduce the attribute amount by the amount of the original transaction.
- Cancel Points. If the original transaction assigned points, you can specify whether to subtract (redeem) the points from the member's point balance.
- Cancel Voucher. If the original transaction granted vouchers, you can specify whether to cancel the vouchers.

For your Redemption Cancellation promotion, keep these promotion actions in mind when creating the promotion rule.

- Cancel Attribute. If you were using an attribute to track a member's redeemed points, you can specify whether to reduce the points redeemed from the tracker.
- Cancel Points. If the original transaction redeemed points, you can specify whether to restore the points to the member's point balance.
- Cancel Voucher. If the original transaction used an earned voucher, you can specify whether to restore the voucher to the member.

You might be wondering what happens to loyalty points in transaction cancellations. Canceling a transaction doesn't impact the expiration date for points. If a member cancels a redemption, then some points might have expired since the member redeemed them. If so, then these points are no longer available if the redemption is canceled. These points are added back to the member's account, but the points have expired and can't be used. It's necessary to expire these points otherwise members could perform transactions and then cancel them in order to avoid expiration dates. Canceling a transaction that qualifies a member for applying a frequency or tier promotion doesn't impact the promotion's resulting actions. For example, you process a transaction and it triggers a frequency or a tier promotion, and the triggered promotion causes a points assignment (if it's a frequency promotion) or causes a tier upgrade (if it's a tier promotion). If you cancel this qualifying transaction, the resulting actions can't be reverted. That is, any points assigned in a resulting frequency promotion, or any tier upgrade in a resulting tier promotion, remain valid.

Set Up a Transaction Cancellation

Let's see how to set up a transaction cancellation for a program.

1. First of all, let's create the required program-level attributes.
    a. Open Loyalty Programs, and then the Edit Program page for your program.
    b. Click Program Level Attributes, and then expand the Transaction Attributes section.
    c. Click Add next to the transaction attributes.
    d. Enter a name, such as Transaction Type, and from the Field list, select Transaction Type.
    e. Click Add.
    f. Enter a name, such as Transaction Sub Type, and from the Field list select Transaction Sub Type.
    g. For each attribute you created, select the Active check box.

       When you create the promotion rules for the program, these attributes are now available.
2. Next, let's create the promotion for accrual transaction cancellations.
    a. Open Promotions, and click Create Promotion.
    b. Complete the necessary fields.

       For example, in the Name field enter Accrual Cancellation. Select the program name from the Program menu, and from the Type menu, select Redemption. For the Subtype, select Cancellation.
    c. Click Save and Continue.
    d. Click Manage Rules, then Create New Rule, and enter a name for your new rule.
    e. Click New Condition.
    f. Create an IF condition where the attribute Transaction Type is equal to Redemption.
    g. Click And, and create a condition where the attribute Transaction Sub Type is equal to Cancellation.
    h. In the DO section of the rule, select the attributes you want to reverse the accrual transaction, such as Cancel Points.
    i. Click Save and Close.
3. You're nearly done. Next, create the promotion for redemption transaction cancellations.
    a. Open Promotions, and click Create Promotion.
    b. Complete the necessary fields.

       For example, in the Name field enter Redemption Cancellation. Select the program name from the Program menu, and from the Type menu, select Accrual . For the Subtype, select Cancellation. .
    c. Click Save and Continue.

d. Click Manage Rules, then Create New Rule, and enter a name for your new rule.
e. Click New Condition.
f. Create an IF condition where the attribute Transaction Type is equal to Accrual.
g. Click And, and create a condition where the attribute Transaction Sub Type is equal to Cancellation.
h. In the DO section of the rule, select the attributes you want to reverse the redemption transaction, such as Assign Points or Assign Voucher.
i. Click Save and Close.

Suppose you want to set a specific cancellation action for individual promotion-level attributes. This lets you override the program-level actions you're configuring here, and gives you more control over what happens to canceled transactions involving particular attributes.

Here's how you specify the cancellation action for an individual promotion-specific attribute:

1. Open the required promotion, and if it's active, deactivate it.
2. Click Promotion Attribute.
3. Select the promotion specific attribute you want to edit, and deactivate it.
4. Select an option from the Cancel Action list:
    - Cancel change. Cancels the recent action.
    - Leave as is. Leaves the action unchanged.
    - Revert. Restores the attribute to its previous value.
5. Reactivate the attribute.

Related Topics

- Create Promotion-Level Attributes

Debit Points Manually as a Transaction

Let's say a penalty is imposed on the member, or a payment is required for service recovery. You can create a transaction to manually deduct or debit points from a member's point balance.

1. Open Transactions, click Create Transaction.
2. Complete the required fields.

   For example, in the Transaction Type menu, select Redemption and in the Transaction Sub Type menu, select Manual Debit. For the Point Type and Base Points fields, select the type of points and enter the number of points to debit respectively.
3. Click Process and you're done.

Related Topics

- Promotion Elements
- Oracle Loyalty Transaction Tasks
- Create Rules for Promotions

Debit Points Manually as a Promotion

Let's say a penalty is imposed on the member, or a payment is required for service recovery. You can create a promotion to manually deduct or debit points from a member's point balance as a transaction.

1. Open Loyalty Programs, and open the program you want.
2. Click Program Level Attributes, and expand the Transaction Attributes section.
3. Ensure that the Transaction Sub Type, Base Points and Point Type attributes are defined on the transaction fields.
4. Click Save and Close.
5. Open Promotions, and click Create Promotion.
6. Fill in the fields. For the Type, select Redemption. For the Sub Type, select Manual Debit.
7. Click Save and Continue.
8. In the Edit Promotion view, click Manage Rules.
9. In the promotion rule criteria, ensure that the Transaction Sub Type is equal to Manual Credit.
10. In Actions, make sure Point Type and Points have these two values:
    - Point Type = Transaction.Point Type
    - Points = Transaction Point
11. Click Save and Close.

Related Topics

- Create Rules for Promotions
- Promotion Elements
- Oracle Loyalty Transaction Tasks

Credit Points Manually as a Transaction

Let's say you want to compensate or reimburse a member, or simply give a gift to a member. You can manually add or credit points to a member's point balance as a transaction.

1. On the Transactions page, click Create Transaction.
2. Fill in the fields.

   For the Transaction Type, select Accrual. For the Transaction Sub Type, select Manual Credit. For the Point Type and Base Points fields, select the type of points and enter the number of points to credit respectively.
3. Click Process.

Related Topics

- Create Rules for Promotions
- Promotion Elements
- Oracle Loyalty Transaction Tasks

Credit Points Manually as a Promotion

Let's say you want to compensate or reimburse a member, or simply give a gift to a member. You can create a promotion to manually add or credit points to a member's point balance as a transaction.

1. On the Programs page, open the program you want.
2. Click Program Level Attributes, and expand the Transaction Attributes section.
3. Ensure that the Transaction Sub Type, Base Points and Point Type attributes are defined on the transaction fields.
4. Click Save and Close.
5. Open the Loyalty Promotions page, and click Create Promotion.
6. Fill in the fields.

   For the Type field, select Accrual. For the Sub Type field, select Manual Credit.
7. Click Save and Continue.
8. In the Edit Promotion view, click Manage Rules.
9. In the promotion rule criteria, ensure that Transaction Sub Type is equal to Manual Credit.
10. In Actions, ensure that Point Type = Transaction.Point Type, and that Points = Transaction Points.
11. Click Save and Close.

Related Topics

- Create Rules for Promotions
- Promotion Elements
- Oracle Loyalty Transaction Tasks

Cancel a Transaction

Most integrated point-of-sales systems cancel transactions automatically, but you can also manually cancel processed transactions.

You can use this procedure to cancel transactions, but keep in mind you can only cancel processed transactions.

1. On the Transactions page, open the transaction you want to cancel.
2. Click Actions and select Cancel.
3. If you're certain you want to cancel the transaction, click OK in the warning message.

   This changes the transaction status from Processed to Canceled, and it creates a reversal transaction. If you want to see the details, click the reversal transaction.

Dispute a Transaction

Let's say you need to update a member program after a member disagrees how the program transactions are accrued.

When this happens, you typically create a dispute accrual transaction, and it's usually for:

- A missing accrual transaction. A member claims that an accrual transaction doesn't appear on his statement.

- An incorrect accrual. A member claims that points received for an accrual transaction aren't correct.

Once the administration approvals are received, you change the dispute transaction status to Accrual Dispute Approval and submit the dispute transaction.

Here's how you create a dispute on an accrual transaction:

1. On the Members page, click the member name you need.
2. In the member overview page, click Loyalty Transactions and make these changes:
    - If you want to dispute an accrual transaction:
        i. Click the down arrow button next to the transaction and select Initiate Dispute.
        ii. Click Save and Continue.
        iii. On the transaction summary page, complete the necessary fields.
        iv. Click Save.
    - If you want to report a missing accrual:
        i. Click Create Missing Accrual.
        ii. On the Create Transaction page, complete the necessary fields.
        iii. Click Save and Close.
3. When the dispute is resolved and you have the necessary approvals, change the transaction status to Accrual Dispute Approved.
4. Click Process.

6 Manage Service Requests

Overview of Oracle Loyalty Service Requests

Use service requests to capture and manage service inquiries related to enrollment, membership updates, transactions or disputes in your loyalty program service center. All service request status and details are accessible on the Member Details page, and this helps you to engage with your loyalty members. You can create new service requests for members, update an existing service request, or more specifically create a new voucher or membership card, or review a transaction.

Here are two things you must do before you get started:

1. Add the Loyalty Member field to the Service Request Creation page and the Service Request Details page layouts.

   For more information on adding fields to page layouts, see Working With Page Layouts in the Oracle Applications Cloud Configuring Applications Using Applications Composer guide.
2. Set up Oracle Loyalty to support Computer Telephony Integration (CTI).

   For more information on configuring CTI, see Oracle B2B Service Implementing B2B Service and the Oracle Loyalty Implementing Loyalty guides.

Related Topics

- Configuring Applications Using Applications Composer
- Implementing B2B Service
- Implementing Loyalty

Create a Service Request

Let's see how to create a service request.

1. On the Members screen, click the name of the member you want.
2. In the member overview page, click Service Requests.
3. Click Create Service Request.
4. Here is some of the information you enter for your service request:

   - Title. Enter a descriptive title for your service request. This is the only required field.
   - Account. Select your customer account.
   - Primary Contact. The primary contact for the account displays automatically.
   - Severity. Select a severity for the service request, such as Low, Medium, or High. The default value is Low.
   - Critical. Select this check box if your service request is high priority.
   - Category. Select the appropriate category for this service request.
   - Product. If your service request pertains to a particular loyalty product, select it from this list.

   - Queue. Assign this service request to a resource queue.
   - Assigned To. Assign this service request to a service representative.
   - Channel Type. Select a communication channel.
   - Attachments. Click the plus icon (+) to add extra information to your service request, such as screen shots or files.
   - Problem Description. Enter a description for your service request.
   - Loyalty Member. Select a loyalty member from the menu, or click Select to locate or create the a loyalty member.
5. Click Save and Close.

Edit a Service Request

Let's see how to edit a service request.

1. On the Members screen, click the name of the member you want.
2. In the member overview page, click Service Requests.
3. Click the service request.
4. Update the required fields.

   For more information on completing these fields, see Manage Service Requests.
5. Click Save and Close.

Manage Service Requests

Here's some information you need to update in your members' service requests (SRs).

- Entering the summary information: Summary information contains details of what the service request is about, such as the customer account, primary contacts, SR description, and so on.
- Composing messages: Use the Messages tab to view, create, and send messages and notes on the SR.
- Viewing Interaction History: Interaction history is a record of the various agent interactions on the service request. For example, if an agent is dealing with a specific customer, the interaction history displays details on when the customer was in touch, through what communication channel, what were the customer's top interactions, and with what agent. This view always shows the parent interaction, and any associated child interactions (including the cross-channel interactions) are nested within the parent interaction. The plus (+) icon displays the child interactions.
- Adding contacts: Add customer contacts to the SR.
- Adding team members: Use the Team tab to add the team members who can view and work on the SR.
- Creating activities: Create activities such as appointments, tasks, and log calls with the customer.
- Viewing linked articles: View related knowledge articles that can help resolve the SR.
- Viewing service request milestones: View the service milestones for the SR.
- Creating work orders. Use the Work Order tab to schedule any work that must be done for the customer.
- Viewing audit history. Use the Audit History tab to view all changes made the SR.

As well as doing these tasks, several SR actions are available from the Actions menu. For example, re-assigning the SR, creating internal notes, and copying the SR link. For more information on these actions, see the topic How To Use the Actions Menu in the Oracle B2B Service Using B2B Service guide.

> **Note:** The Launch Co-Browse action is currently not supported in Oracle Loyalty.

Related Topics

- Using B2B Service

7 Manage Group Memberships

Update Group Member Information

To set up loyalty group administration, you must be a Loyalty Program Administrator. Imagine that you want to update information for multiple loyalty members at once. For example, you have a number of members who are frequent business travelers, and you want to upgrade their points or status. Instead of amending the details for each individual member, group member updates allow you do this for selected members in a single action.

You can make these changes for group members.

- Group Membership Change. Change the status of the members, for example from Active to Inactive.
- Group Point Update. Give the members additional points or reduce the number of points they have (point credit or debit).

  To be able to process group point updates, you must perform the setup task of creating two promotions, one for each type of group point update: point credits and point debits. For details, see the topic Set Up Group Points.
- Group Tier Change. Change the tier of the members.

To perform a group update, you identify the members you want to update by creating a Comma-Separated Value (CSV) file. Then you import this file and specify the changes to be made.

Here's how you administer group member updates.

1. First, you need to set up the two required promotions for processing group point updates. You only do this once for each loyalty program, and these promotions are used for all subsequent group point updates.

   For details, see the topic Set Up Group Points.
2. Next, create a CSV file that includes the numbers and, optionally, the names of all the members you want to change. The maximum file size is 250 MB. The easiest way to create the CSV file is to create an Excel spreadsheet and save it as a file type CSV. If cells A1 and A2 in the Excel spreadsheet don't contain these exact text values, the file import will fail:
   - Cell A1: #LOY Member Administration
   - Cell A2: #"LOY Member.Member Number"
   - (Optional) If you want to update the enrollment start date, enrollment end date, or incentive choice for members, you can enter these values in cells B2, C2 and D2: #"Enrollment Start Date", #"Enrollment End Date", #"Incentive Choice".
   - Cells A3, A4, A5, and so on, must include the member numbers of the members whose data you want to change. You can find these on the Members screen.
3. Open the Group Membership Administration page and click Create Job.
4. On the Import File page, click Import , and upload your CSV file.

   The preview table displays a maximum of ten records, regardless of how many records are in the CSV file.
5. Click Next.
6. On the Define Action Type page, select the program you want to change and select the type of change you want to make.

7. Here are the action types available to you:
   - Bulk Membership Change. In the New Status field, select the new membership status for these members. In the Reason Code field, select the reason for the change.
   - Bulk Point Update. In the Adjustment Type field, select Credit to add points or Debit to subtract points from the member's totals. In the Point Type field, select the type of point that's affected. In the Quantity field, enter the number of points added to or subtracted from the members' totals. In the Reason Code field, select the reason for the change.
   - Bulk Tier Change. In the New Tier field, select the tier for these members. In the Tier Start Date field, enter the date when the change is applied. In the Reason Code field, select the reason for the change.
   - Bulk Promotion Enrollment. In the Promotion field, select the promotion for these members. In the Enrollment Date field, select the member's date of enrollment in the promotion. In the Reason Code field, select the reason for enrolling these members in the promotion. In the Incentive Choice field, select the incentive choice for this promotion if applicable.
8. Click Next.

   Here you see a a preview of your changes.
9. Click Submit.

   The Loyalty Group Member Administration screen appears, listing your new job with an In Progress status.
10. In the Actions menu, select Refresh.

    This updates the list of Group Membership Administration jobs. When the job has been completed, the status updates to Completed, and the Total Records field displays the number of updated records.
11. If you need to determine if any records weren't processed, review the Result File. This helps you to correct any errors and reprocess those records.

Set Up Group Points

Before you start doing group updates for your members, first you have to configure your loyalty program. Each of your loyalty programs needs two configured promotions: one promotion to do group point assignments (credit), and a second promotion to do group point redemptions (debit).

Let's see how to set up promotions for processing group member point updates.

1. First of all, let's create the required program-level attribute.
   a. On the Programs page, open the program you want.
   b. In the program summary page, click Program Level Attributed and expand the Transaction Attributes section.
   c. Click Add next to the transaction attributes.
   d. Enter a name, such as Transaction Points, and from the Field list, select Points.

      The data type Number is specified automatically.
   e. Click the Active check box.
   f. Click Save and Close.

      When you create the promotion rules for the program, this attribute is now available.
2. Next, let's create the promotion for administering a group point credit.
   a. On the Promotions page, click Create Promotion.

b. Complete the necessary fields.

   For example, in the Name field, enter Supremo Group Point Credit. Select the program name. For promotion type, select Accrual. For subtype, select Bulk Credit.
c. Click Save and Continue.
d. Click Manage Rules, then click Create New Rule, and enter a rule name, such as Administration Group Point Credit.
e. Click New Condition.
f. Create an IF condition where the attribute you just created is greater than zero.
g. In the DO section of the rule, select Perform an Action, and select Assign Points. Ensure that the Point Type, Sub Point Type, and Points are equal to the attribute Transaction Points.
h. Click Save and Close, and then click Close.
i. Select the Active check box for the promotion, and click Save and Close.

3. You're nearly done. Next, create the promotion for administering a group point debit.

   a. On the Loyalty Promotions page, click Create Promotion.
   b. Complete the necessary fields.

      For example, in the Name field enter Supremo Group Point Debit. Choose the program name. For the promotion type, choose Redemption. For the subtype, choose Bulk Debit.
   c. Click Save and Continue.
   d. Click Manage Rules, click Create New Rule, and enter a name for your new rule such as Administration Group Point Debit.
   e. Click New Condition.
   f. Create an IF condition where the attribute you just created is greater than zero.
   g. In the DO section of the rule, select Perform an Action, and select the Redeem Points action.
   h. Specify the Point Type and Sub Point Type. Click OK.
   i. Click Save and Close, and then click Close.
   j. Select the Active check box for the promotion, and click Save and Close.

View Group Member History

When you're done administering your group transactions, you can take a look at how and when all these transactions were processed. For example, you can look for a specific job, get information on the number of records processed, and review the file used for processing.

1. Open the Group Membership Administration page.
2. In the list of jobs, click the job number field of the job you want.

   The job details appear.

Delete Members in a Group

You can delete member, member data, and all transactional data for members created during the specified period.

1. First of all, you must set up and run these jobs:

    - Delete Loyalty Members
    - Transactions Main Job

    For details on running batch jobs, see the topic Create a Batch Process.
2. In the basic parameters, specify the From Date and To Date.

8 Manage Batch Processing

Overview of Batch Processing

Let's look at what batch jobs process which objects in Oracle Loyalty.

Object	Batch Job	Description
Transactions	Loyalty Batch Engine Main Job	To process transactions with Queued status, including transactions set to Queued status by either the Oracle Loyalty application (automatically or manually) or the API.
Tiers	Loyalty Batch Engine Main Job	To check tier setups for the tier end (expiration) dates. Once a tier reaches its end date (as compared to the system date), the Oracle Loyalty batch engine performs a tier downgrade or tier requalify for all members in that tier. **Note:** Tier upgrades occur in real time, and aren't part of batch processing.
Both Tiers and Transactions	Loyalty Batch Engine Main Job	To process both transactions and tier records in the same job.
Points	Batch Engine Point Expiry Main Job	To check program members for point expiration dates. Once points reach their end dates, Oracle Loyalty expires any unused points, reducing the member's point balance. The expiration basis is set when the point type is defined in the loyalty program. **Note:** Qualifying points don't expire.
Events	Loyalty Event-Driven Rewards Main Job	To generate event transactions.
Point Blocks for Prepaid Partners	Loyalty Partner Debit Main Job	To debit point blocks when members accrue points from transactions with prepaid partners.

Object	Batch Job	Description
Members and Transactions	Delete Loyalty Members and Transactions Main Job	To delete members and related transactional data.

To split the load impact, you can define and schedule multiple jobs to process individual objects. You can schedule processes to run immediately, at a scheduled time, or on a regular basis at a set time.

Batch Job Types and Settings

You can set up Oracle Loyalty batch jobs to schedule regular processes and to run other tasks as you need to.

This table summarizes the batch jobs you use in Oracle Loyalty.

Oracle Loyalty Job Name	Description	Basic Parameters
Loyalty Batch Engine Main Job	Processes queued transactions and checks tier setups for tier expiration dates.	Object Type Number of Sub Jobs Database Fetch Size Number of Database Fetches
Loyalty Batch Engine Point Expiry	Checks members for expired points and reduces their point balance accordingly.	None
Loyalty Event Driven Rewards Main Job	Creates event-driven reward transactions.	Number of Sub Jobs Database Fetch Size
Loyalty Partner Debit Main Job	Consolidates and debits points from the partners' point blocks.	None
Delete Loyalty Members and Transactions Main Job	Deletes all member and related transactional data for the creation date range.	From Date To Date
Loyalty Point Aggregation Job	Populates the point aggregation table.	None
Loyalty Point Aggregation Reset Job	Cleans up, initializes, and repopulates the point aggregation tables.	None

Oracle Loyalty Job Name	Description	Basic Parameters
Loyalty Bulk Membership Administration Operations	Updates a set of members in the uploaded file with a particular action.	Attribute1
Loyalty Bulk Membership Administration Operations: Subprocess	A subprocess of the Loyalty Bulk Membership Administration Operations job.	Attribute1 Attribute2 Attribute3

Create a Batch Process

Use Oracle Loyalty batch processes to schedule your background activities. You define how and when they're processed.

You schedule batch jobs to process:

- Queued transactions
- Expired tiers
- Expired points
- Event-driven rewards
- Point block debits for prepaid partners
- A range of members and transactions you want to purge

Let's see how you can create new Oracle Loyalty batch processes:

1. Open Tools, then Scheduled Processes.
2. Click Schedule New Process.
3. Use the menu to locate and select the job you need for your object type.
   Here are some of the loyalty objects and the batch jobs you can use with them.
   - Transactions and tiers: Select the Loyalty Batch Engine Main Job. In the Parameter section, select one of the following object types: Transactions, Tiers, or Both.
   - Batch points: Select the Loyalty Batch Engine Point Expiry Main Job.
   - Events: Select the Loyalty Event Driven Rewards Job.
   - Point blocks for prepaid partners: Select the Loyalty Partner Debit Main Job.
   - Members and transactions to purge: Select the Delete Loyalty Members and Transactions Main Job.
4. Click OK.
5. Next, enter the basic option parameters for your batch job. For more information, see Batch Job Types and Settings.
6. Finally, to schedule your new process, click Advanced, then Schedule.
7. Here you have some options for your scheduled batch job:
   - To run the process immediately, select As Soon As Possible.
   - To define a schedule for the process, select Using a Schedule, then select your frequency or date range.

  - To set up notifications for the process, click Notification, then add the notification recipients.
8. Click Submit.

When you submit a main batch job, this creates a set of sub-jobs, which in turn are processed. You can view the log associated with a sub-job both during and after the sub-job is complete. Click Refresh to review the sub-job progress. The main batch job remains paused until all sub-jobs are complete.

Basic Parameters for Batch Jobs

Some Oracle Loyalty batch jobs require you to set basic parameters when you schedule the job.

Let's look at those parameters and what they do.

Basic Parameter	Description
Object Type	The type of object to process. • Transactions • Tiers (Expired) • Both (Transactions and Tiers) • Points (Expired) • Events • Point Blocks (for Prepaid Partners)
Number of Sub Jobs	The number of parallel processes the job can spawn. Enter a multiple of 15 that's based on the number of ESS servers in the cluster. For example if you have one server, enter 15. If you have two servers, enter 30, and so on. A multiple greater than 15 may not always give optimal performance if the number of ESS servers isn't increased proportionally.
Database Fetch Size	The maximum number of objects the job can retrieve from the database in a given fetch. The fetch size depends on: • Your database pod size • The object type
Number of Database Fetches	The number of times the job queries the database in a given run. Ideally, you want to enter batch parameters where the number of objects to process equals the database fetch size times the number of fetches. For example, if you have 1,500,000 objects to process, and you set the database fetch size to 150,000 and the number of database fetches to 10, then the job processes all the objects (150,000 x 10 = 1,500,000). If you have 1,500,100 objects to process, then the job would result in 100 unprocessed objects. These objects would get picked up the next time the job runs.

Basic Parameter	Description
From Date	The earliest date in a range, used in conjunction with the To Date parameter.
To Date	The latest date in a range, used in conjunction with the From Date parameter.

Scheduling Frequency

You can schedule batch processes to run at the following times:

- Once, immediately upon submitting the job.
- Once, at a scheduled time.
- On a repeating schedule, such as daily at a particular time.
- In parallel, scheduling jobs to run at the same time.

Manage Batch Processes

Let's see how you manage your Oracle Loyalty batch processes using the Tools interface.

1. Open Tools, then Scheduled Processes.
2. Select the scheduled process you need.
3. Here are some ways you can update your process:
    - Schedule New Process
    - Resubmit (With or without changes)
    - Put on Hold
    - Cancel Process
    - Release Process
    - View Log

    > **Note:** Depending on the status of your process, you won't be able to select some of these options. For example, if you want to update a process that's in Succeeded status, then you can't select Cancel Process or Release Process.
4. Complete the fields as necessary.