Oracle Loyalty Cloud

Extending Loyalty

21D

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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.

If you don't see **Show Help Icons** in the Settings and Actions menu, you can access the Oracle Help Center to find guides and videos.

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.

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1 About This Guide

Audience and Scope

This guide provides information on how loyalty program administrators extend specific elements of Oracle Loyalty in relation to enrolled members and their respective transactions.

Before extending Oracle Loyalty members and transactions, you must perform the tasks relating to simplified UI documented in the complementary Oracle Applications Cloud Configuring Applications Using Applications Composer guide, which is frequently referenced in this guide. It assumes that you're familiar with the functionality provided with Oracle CX Sales and B2B Service, and that you have set up Oracle Loyalty.

You can extend the following objects in Oracle Loyalty:

- Oracle Loyalty Transaction homepages and work areas (Create and Detail pages)
- Oracle Loyalty Member homepages and work areas (Create and Detail pages)
- Oracle Loyalty Program and work areas (Create and Detail pages)
- Membership cards and voucher fields (child object of Loyalty Members)
- Redemption Products (child object of Loyalty Program)
- SOAP API
- REST API
- Analytics
- Import and export management for Member objects, and child objects
- Import and export management for Transaction objects, and child objects
- Bulk export management for Member child objects

> **Note:** In this application, the Service Request object is a related object. For more information on importing and exporting related objects, see the chapter Importing and Exporting in the Oracle B2B Service Implementing B2B Service guide.

This guide explains how to use Application Composer to extend Oracle Loyalty objects, for example:

- Which Oracle Loyalty attributes are extensible
- How to add child objects to the Loyalty Member and Loyalty Transaction objects
- How to change attribute labels for the Loyalty Member and Loyalty Transaction objects
- How to change page layouts for the Loyalty Member and Loyalty Transaction pages

Related Topics

- Configuring Applications Using Application Composer
- Implementing B2B Service
- Understanding Import and Export Management for CX Sales and B2B Service

Related Guides

You may want to consult other guides in addition to this one as you implement, administer, maintain, and use Oracle Loyalty.

For example, Oracle Applications Cloud Configuring Applications Using Applications Composer introduces you to simple, common configurations of Oracle Loyalty. If you want more information on importing and exporting data in Oracle Loyalty, see Understanding Import and Export Management for CX Sales and B2B Service.

Related Topics

- Configuring Applications Using Application Composer
- Getting Started with Your Sales Implementation
- Implementing Sales
- Administering Loyalty
- Understanding Import and Export Management for CX Sales and B2B Service

2 Extend Oracle Loyalty

Overview of Oracle Loyalty Extensibility

Administrators can extend Oracle CX applications at run time using browser-based composers and other tools. These extensions are visible and usable by all or by a subset of Oracle CX applications users. Extensions range from changing the look and feel of a page, to extending standard objects, adding a new object and associated pages and application functionality, changing workflows, defining security for new objects, and altering reports. Access to run time extension tools depends on your role. If you're assigned a role with an administrative privilege, you can access most run time extension tasks.

In Oracle Loyalty, only the Loyalty Program Administrator can create custom objects and use all other Application Composer functions. It is recommended that you provision the user with the Customer Relationship Management Application Administrator job role (for performing the extensions) and the Custom Objects Administration job role and Sales Administrator job role (for testing the extensions in the Oracle CX UI). For more information on performing administrative tasks in Oracle Loyalty, see Administering Loyalty.

There may be areas of Oracle Loyalty that you want to change to meet your business needs. For example, you might need to add additional fields to a page. You can accomplish this in Oracle Loyalty by extending pages. You extend pages by editing them at runtime, which means that you can change pages to meet your needs as soon as they arise. Because changes you make at runtime are seen immediately by users, you must first create a sandbox that's separate from the mainline application to isolate your changes. A sandbox provides an independent development environment so that you can fully test your changes before merging them with the mainline code and making them available to your end users. For more information on changing page layouts, see Changing Page Layout Using Page Composer.

Before extending Oracle Loyalty members and transactions, you must perform the tasks relating to simplified UI documented in Oracle Applications Cloud Configuring Applications Using Applications Composer available from Oracle Help Center at: http://docs.oracle.com.

3 Set Up Oracle Loyalty Pages

Enable a Search by Membership Card

You can extend the member list page of Oracle Loyalty to search specifically for a member based on a membership card number.

Searching for a member by using their membership card number is a quick way for your end users to a locate member's records. For example, your users may need to quickly update a member record, but what if there are several members with the same name? Scrolling through numerous records, and correctly selecting the required member is time-consuming. Instead, users can perform a search specific to the user membership card number to easily find what they're looking for.

To enable a membership card search on the member list page:

1. Confirm that you're in a sandbox session.
2. In Application Composer, select the Standard Objects node.
3. Select the Loyalty Member object, then select the Pages node.
4. In the Landing Page Layout panel, select the Standard layout, click Actions, then Duplicate.
5. In Duplicate Layout, do the following:
    - In the New Layout Name field, enter a name for your layout.
    - Select Standard Layout from the Source Layout menu.
6. Click Save and Edit.
7. In the Landing Page Layout edit page, click the edit icon in the Loyalty Members panel.
8. In the Configure Detail Form: Buttons and Actions panel, select Membership Card Search, and move it to the Selected Buttons column.
9. Click Save and Close, and click Done in the Landing Page Layout edit page.

Modify Application Pages

You can extend the application pages in Oracle Loyalty using Application Composer.

For example, you can modify your application pages by adding any of the following:

- dynamic page layouts
- field groups
- subtabs
- custom actions and links
- Groovy scripting

For detailed information on extending Loyalty using Application Composer, see Oracle Applications Cloud Configuring Applications Using Applications Composer available from Oracle Help Center at: http://docs.oracle.com.

4 Set Up Oracle Loyalty Attributes and Custom Fields

Create an Oracle Loyalty Attribute or Custom Field

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 Program record, 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. For more information on attributes in Oracle Loyalty, see Administering Loyalty available from Oracle Help Center at: http://docs.oracle.com.

You can extend pickers for the Account, Contact, and Household objects in Oracle Loyalty. These extensions allow your sales users to search and associate records using data pertinent to their business. They can search using custom fields and view custom fields in the search results, allowing them to locate and use the correct record easily. Administrators can create dynamic role-based picker layouts, enable hidden standard fields for searching within pickers, re-arrange fields in the search and result sections, define default values for search fields, and mark certain fields as read-only, or required, based on their business need. For more information on extensible pickers, see the Extend Application Pages chapter in Oracle Applications Cloud Configuring Applications Using Applications Composer.

To create a custom field or attribute for the Loyalty or Transaction object in Oracle Loyalty:

1. Confirm that you're in a sandbox session.
2. In Application Composer, select the Standard Objects Node.
3. Select either the Loyalty Member or Loyalty Transaction object, then select the Fields node.
4. On the Custom Fields tab, click Actions, then Create.

   Application Composer provides a set of field types that you can choose from when creating custom fields:

   - Check box
   - Currency
   - Date
   - Datetime
   - Choice List (Dynamic)
   - Choice List (Fixed)
   - Formula
   - Long Text
   - Number
   - Percentage
   - Record Type
   - Text
5. Select the type of field you want to create, and then specify the required field attributes to create the custom field.

The following attributes can be added to a Member object:

Data Type	Attribute	Notes	Use Case
Number	Number of Children	Refers to the number of children in a loyalty's member's family.	10 % bonus on baby products for members with children.
Number	Number of Services	Refers to the number of services to which a loyalty member subscribes. This is used particularly in the utilities and retail sectors where a loyalty member is signed up to several services.	30% bonus points for customers with more than 5 services.
Text	Billing Status	Derived from external billing systems.	10% bonus if billing status is clear.
Date	Date of Birth	Refers to the loyalty member's date of birth.	100% bonus for transactions within 1 week before or within one week after member's date of birth.
Date	Anniversary Date	Refers to the loyalty member's anniversary date.	Free dinner coupon when the member spends more than $100 within the month of his anniversary.

The following attributes can be added to a Transaction object:

Data Type	Attribute	Notes	Use Case
Number	Number of Nights	Refers to the number of nights a loyalty member stays at a hotel.	100 points per night if member stays for less than 5 nights. 150 points per night if the member stays for 5 nights or greater.
Date	Payment Date	Used in a billing scenario where a payment is deferred. For example, in the telecommunications or retail sectors where billing can be aggregated.	If the payment date is within 7 days from the billing date then the member is awarded a 100 points bonus.
Text	External Product Type	Defines an external product type or category, which then can be used in promotions.	If the external product type is an electronic product, then the member is awarded a voucher worth 5% of the value.

After you create custom fields, you must expose those fields on the user interface pages, before your end users can see them. Highlight the object's Pages node to add custom fields to one or more page layouts for the object.

You can't delete either standard or custom fields from objects. If you no longer need a field, then optionally enter a note in the field description that the field is no longer used.

5 Set Up Oracle Loyalty Child Objects

Create an Oracle Loyalty Child Object

A child object is an object that has one-to-many relationship with a parent object and can be a parent object of another child object. If an object's parent object is already a child object (of another parent object) then that object is a grandchild object. Custom subject areas support parent-child-grandchild-grand grandchild objects.

To create a child object for the Member or Transaction object in Oracle Loyalty:

1. Confirm that you're in a sandbox session.
2. In Application Composer, select the Standard Objects Node.
3. Select either the Loyalty Member or Loyalty Transaction object, then select the Fields node.
4. On the Custom Fields tab, click Action, then Create Child Object.
5. Click in the Display Label field and enter a label for the child object. In this example, enter "MemberCard".

   The other fields on the Create Child Object page are automatically populated with default values.
6. In the Plural Label field, enter "MemberCards".
7. Click in the Object Name field and enter "MemberCard".
8. (Optional) Select the check box to ensure each child object has a unique record name value.
9. (Optional) Select the check box to enable case sensitivity on the record name value.
10. (Optional) In the Description field, enter a description for the new child object.
11. Click OK.

The new MemberCard custom child object appears in the object tree.