Siebel Loyalty Administration Guide

Version 7.7

March 2004

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PRODUCT MODULES AND OPTIONS. This guide contains descriptions of modules that are optional and for which you may not have purchased a license. Siebel's Sample Database also includes data related to these optional modules. As a result, your software implementation may differ from descriptions in this guide. To find out more about the modules your organization has purchased, see your corporate purchasing agent or your Siebel sales representative.

Contents

1 What's New in This Release

What's New in Siebel Loyalty Administration Guide, Version 7.7

Siebel Loyalty 7.7 is the first release of this new product. Table 1 lists the major features of the product described in this version of the documentation.

Table 1. New Product Features in Siebel Loyalty Administration Guide, Version 7.7

Topic	Description
Chapter 2, "Overview of Siebel Loyalty"	General background about Siebel Loyalty.
Chapter 3, "Getting Started with Siebel Loyalty"	How to set up Siebel Loyalty.
Chapter 4, "Setting Up Siebel Loyalty Programs"	How to create loyalty programs, which give rewards to members based on their transactions.
Chapter 5, "Setting Up Siebel Loyalty Promotions"	How to create Loyalty promotions, which give bonus rewards to members.
Chapter 6, "Host Organization's Use of Siebel Loyalty"	How member service representatives and sales representatives use Siebel Loyalty.
Chapter 7, "Partner Use of Siebel Loyalty"	How partner companies use Siebel Loyalty.
Chapter 8, "Member Self-Service with Siebel eLoyalty"	How members use Siebel Loyalty.

2 Overview of Siebel Loyalty

This chapter provides an overview of Siebel Loyalty. It includes the following sections:

- "About Siebel Loyalty" on page 9
- "Siebel Loyalty Life Cycle" on page 10

About Siebel Loyalty

Siebel Loyalty allows companies to build customer loyalty by creating reward programs and promotions. For example, it can be used to create and manage:

- Frequent-flyer programs for airlines.
- Supermarket programs that give bonus points to shoppers.
- Programs that give bonus points to retailers based on their sales of a manufacturer's products.

Any of these programs can include promotions, which give members extra rewards for specific behavior. For example, a promotion may give members bonus points for purchasing a specific product during a specific month.

Siebel Loyalty Members

The members of loyalty programs can be:

- **Individuals.** For example, frequent flyer programs typically enroll individuals.
- **Households.** For example, a grocery store or retail store might enroll an entire household in a loyalty program, so the household gets the bonus no matter which member of the family makes purchases.
- **Accounts.** Loyalty programs may enroll customer accounts and partner accounts. Your customer accounts can join as members of loyalty programs to get bonus points when they purchase your products. Your partners can also join as members, so they can get incentives for reselling your products, for taking training courses, or for other behavior.

Siebel Loyalty Users

Siebel Loyalty can be used by:

- **Your Employees.** Your salespeople and member service representatives can enroll customers as members in loyalty programs, sell products that give rewards to members, redeem members' rewards, and resolve members' service requests.

- **Partners.** Your partners can use the Siebel Loyalty Partner Portal to work with Siebel Loyalty through the Web. If it is appropriate to your business model, partner companies can deal with members in the same way that your own employees can. For example, in the automobile industry, it is typical for dealers to sell products to customers and enroll customers as members in reward programs. Loyalty programs can also be aimed at partners. For example, you can reward partners based on their sales of your products.
- **Customers and Members.** Customers can use the Siebel eLoyalty to sign up as members in programs through the Web. Members can use eLoyalty to check their point totals, redeem their rewards and perform other activities through your Web site.

All of these users share information in the same database, and they are all able to view information that the others entered when appropriate. For example, when members use eLoyalty to self-enroll, your employees can see the information they entered, so you can provide these members with service. If a partner enters a transaction, your employees will be able to see that transaction, but other partners will not.

Siebel Loyalty Life Cycle

The life cycle of a loyalty solution typically has three phases—design, implementation, and measurement.

Design of a Loyalty Program

To design a loyalty program, you must do the research and analysis to determine who your best customers are and how you want to affect their behavior.

Depending on your business model, you may want to increase the frequency of a customer's interactions, the total dollars spend per transaction, the total life cycle of the customer, or other behavior.

For example, a major airline may find that 10 percent of its customer base generates more than half its total revenue. When the airline recognizes that frequent flyers are the major source of revenue, it can design a loyalty program to appeal to them, which would increase the frequency of their transactions.

Siebel Analytics can help you analyze your customer base. A smaller research effort may 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.

Implementation of a Loyalty Program

Implementing a loyalty program involves:

- **Setting Up Siebel Loyalty.** You must install and configure the product. For more information, see Chapter 3, “Getting Started with Siebel Loyalty.”

- **Setting Up Programs.** You can design one or more loyalty programs, such as frequent flyer programs for airlines, bonus point program for supermarkets, or other programs appropriate to your industry. For more information, see Chapter 4, "Setting Up Siebel Loyalty Programs."
- **Setting Up Promotions.** Within the program, you can design special promotions, such as extra bonus points to encourage customers to buy a new product that you are trying to promote or to make purchases during the slack season. For more information, see Chapter 5, "Setting Up Siebel Loyalty Promotions."

Measurement of a Loyalty Program's Results

After a program is in place, you measure its results, to see if it is achieving the goals you set during the design phase.

For example, if the goal was to make your most frequent customers increase the number of transactions, you would measure:

- How much these transactions have increased.
- What effect the increase has had on revenue and earnings.
- What is the ROI of the program (the increase in earnings divided by the cost of implementing the program).

This measurement of the results can help you design future programs.

Like the design phase, the measurement phase can use Siebel Analytics.

3 Getting Started with Siebel Loyalty

This chapter covers how to set up Siebel Loyalty. It includes the following sections:

About Getting Started with Siebel Loyalty

This chapter lists the applications administration tasks that are specific to setting up Siebel Loyalty. Use this chapter in combination with *Applications Administration Guide*.

Applications Administration Guide covers the set-up tasks that are common to Siebel Applications, such as using license keys, defining employees, defining your company's structure, and adding partner companies. It also provides the information that you need to perform data administration and document administration tasks.

This guide assumes that you have already installed or completed the upgrade of Siebel Loyalty. If you have not, go to the Server Installation and Upgrade section of the *Siebel Bookshelf* and click the links to the guides that are relevant to your company's implementation.

The *Siebel Installation Guide* for the operating system you are using describes how to create the Siebel Administrator account that is used to perform the tasks described in this guide.

In addition to the preliminary set-up tasks covered in this chapter, two major set-up tasks for Siebel Loyalty are covered in other chapters:

- Chapter 4, "Setting Up Siebel Loyalty Programs"
- Chapter 5, "Setting Up Siebel Loyalty Promotions"

Configuration of Siebel Loyalty

You can configure Siebel Loyalty in many ways to suit your business model. Some common forms of configuration are:

- "Creating Point Types for Loyalty Programs" on page 14
- "Changing the Fields Used in Loyalty Attributes" on page 15
- "Creating Apply To Types for Loyalty Promotions" on page 16
- "Configuring the Submit Process" on page 17

Creating Point Types for Loyalty Programs

Many loyalty programs have only one type of point. For example, frequent flyer programs only give customers points that can be redeemed for free flights.

Other loyalty programs have several types of points. For example, a program may have training points that can be redeemed for free training and merchandise points that can be redeemed for free merchandise.

For more information about point types, see "Defining Point Types for Loyalty Programs" on page 34.

When loyalty administrators define a new loyalty program, they must select the point types the program uses in the Point Types view of the Loyalty Program Administration screen.

You must define the values for point types, so the values correspond to the point types that your loyalty programs use. You should be familiar with Siebel Tools before performing this task.

For more information about Siebel Tools, see *Using Siebel Tools*. For more information about modifying lists of values, see *Applications Administration Guide*.

NOTE: If your loyalty programs use only one point type, you should configure the product so there is only one point type, all points are of this type, and the Point Type field is hidden from the user.

Siebel Loyalty allows you to define up to four point types per program. This section gives you general instructions on how to add more point types, if they are required for one program.

To add a new point type

1. Using Siebel Tools, create new table columns with the following values:

Table	Column to Copy	New Column Name
S_LOY_MEMBER	POINT_TYPE_D_VAL	POINT_TYPE_E_VAL
S_LOY_MEMBER	LFTM_PT_TYPE_D_VAL	LFTM_PT_TYPE_E_VAL
S_LOY_MEM_TIER	POINT_TYPE_D_VAL	POINT_TYPE_E_VAL

2 Using Siebel Tools, create new business component fields with the following values, and map these fields to the new columns created in Step 1:

Business Component	Field to Copy	New Field Name
LOY Engine Member	Point 4 Value	Point 5 Value
LOY Engine Member	Lifetime Point 4 Value	Lifetime Point 5 Value
LOY Engine Member Tier	Point 4 Value	Point 5 Value

3 In the List of Values Administration view of the Application Administration screen, add the following value to the list of values list:

LOV Type	Display Name	LIC
LOY_ATTRIB_FIELDS_MEM_POINT	Point 5 Value	Point 5 Value

4 Make changes to the other copies of the Member and Member Tier Business Components and Applets needed to expose the changes in the client.

With this configuration, users will be able to select Point 5 Value as a point type when they create loyalty programs.

Changing the Fields Used in Loyalty Attributes

Attributes are used to create rules for promotions. For more information, see “Creating Attributes for Loyalty Promotions” on page 86.

Most types of attributes represent fields in records such as the Member record or the Transaction record.

The List of Values Administration view of the Application Administration screen is used to specify the fields within each record that are available for use as attributes.

Table 2 shows the value of the Type field in the List of Values Administration view that is used to specify the fields that can be used for each type of attribute.

Table 2. Type in LOV Administration Used to Specify Values for Attribute Types

Attribute Type	Value of Type field in LOV Administration
Member Field Attributes	LOY_ATTRIB_FIELDS_MEMBER
Member Tier Attributes	LOY_ATTRIB_FIELDS_TIER
Transaction Attributes	LOY_ATTRIB_FIELDS_TXN
Promotion Specific Attributes	LOY_ATTRIB_FIELDS_PROMO_BUCKET
Point Type	LOY_ATTRIB_FIELDS_MEM_POINT

You can change the fields that a type of attribute can represent by changing its list of values in the List of Values Administration view.

NOTE: Each entry in the List of Value Administration view should represent an active field in the corresponding business component.

For more information about changing lists of values, see *Applications Administration Guide*.

Creating Apply To Types for Loyalty Promotions

The Apply To field of the Promotion record specifies the type of transaction that the promotion applies to. For example, some promotions apply only to redemptions and some only to accrual transactions. This field is used only for loyalty promotions, not for tier promotions.

For information about how the user enters values in this field, see "Creating a Loyalty Promotion Record" on page 89.

Before configuration, the user can choose the values Accrual-Product, Loan, Redemption-Product, Cancellation, Accrual-Gift, Bonus, and Voucher. This topic gives you information about how to change the available Apply To types.

The values that users can choose in this field are specified in List of Values Administration view, in records with the Type field of LOY_PROMOTION_SUB_TYPE. The Language Independent Code in the List of Values Administration view corresponds to a DTYPE_BOOL field on the LOY Engine Transaction business component, as shown in Table 3.

Table 3. Values Available for the Apply To Field of a Promotion

Display Name (in LOV Administration Records with Type LOY_PROMOTION_SUB_TYPE)	Language Independent Code (Field in LOY Engine Transaction Business Component)
Accrual-Product	Engine Is Accrual-Product
Loan	Engine Is Loan
Redemption-Product	Engine Is Redemption-Product
Cancellation	Engine Is Cancellation
Accrual-Gift	Engine Is Accrual-Gift
Bonus	Engine Is Accrual-ActionBasedBonus
Voucher	Engine Is Voucher

The Apply To field filters transactions to see if the promotion should be evaluated for them. It evaluates the appropriate fields of the transaction as Y or N depending on whether these fields meet the appropriate conditions. For example:

- For Engine Is Accrual-Product, the Apply To field checks for Type = Accrual and Sub Type = Product.

- For Engine Is Cancellation, the Apply To field checks for Sub Type = Cancellation.

If these fields evaluate as Y, then the transaction is evaluated to see if it qualifies for the promotion. If they do not evaluate as Y, the transaction is not considered for the promotion.

More than one of these fields can evaluate as Y for a given transaction. For example, a transaction could be Accrual-Product and also Voucher. In this case, the transaction is considered for promotions of both these types.

If the promotion Apply To field has no value, then all transactions are evaluated to see if they qualify for the promotion.

You can extend the Apply To field to evaluate any fields, not only the Type and the Sub Type. For example, if the Type is Voucher, you can also evaluate the Voucher Id field.

You can change the values in the Apply To field by using the following procedure. This procedure gives you general instructions, and you should be familiar with Siebel Tools before using it. For more information about Siebel Tools, see *Using Siebel Tools*.

To extend the Apply To field

1. In the List of Values view of the Application Administration screen, query for records with Type = LOY_PROMOTION_SUB_TYPE.
2. Copy one of the records and change the Display Name and Language Independent Code to the desired values.
3. In Siebel Tools, go to the LOY Engine Transaction Business Component and add a field with the following properties:
   - Name = Language Independent Code (LIC) of the newly created record.
   - Calculated = TRUE
   - Type = DTYPE_BOOL
   - Calculated Value = desired expression

   NOTE: There is no need to force-activate the field. The engine will do it automatically.

Configuring the Submit Process

When a user clicks the Submit button to submit a redemption transaction, the application validates that the member has enough points before creating a loyalty transaction that is queued to be processed by the Loyalty Engine.

You can configure the application to change how the bill is processed. For example, the member’s point balance could first be checked to make sure there are enough points. If there are, then the credit card could automatically be checked to see if it can pay the currency amount. If both are valid, then the loyalty transaction to debit the points could be created and the credit card debit sent to the credit card processing company.

The Submit button runs from Buscomp level user properties. The sequence of these user properties determines the order in which the steps are performed.

Setting Up Server Keys for Siebel Loyalty

Server keys are used for batch components, not for realtime components. For more information about batch and realtime components, see "Setting Up Server Components for Siebel Loyalty" on page 19.

Server keys are used for two reasons:

- To distribute members across different servers and processes, for load balancing.
- To make sure that only one process is processing a member at any time. (Within the process, the engine makes sure that only one processing thread is processing a member at any time.)

The application automatically assigns the least-loaded key to new members.

Using Server Keys for Load Balancing

The number of different keys you should define depends on:

- The number of servers available.
- The number of processes that can run on each server.
- The number of keys you assign to each server - process number combination.

It is recommended that you assign ten keys to each server - process number combination to allow the administrator to do load balancing by shifting keys from one process to another.

For example, imagine you determine that you need five server processes to process loyalty transactions. You have two servers available that can each can run three processes, but one of them is already running another process.

It is possible to create only five keys and assign them to the five available server processes, as shown in Table 4.

Table 4. The Smallest Number of Keys You Can Define for Five Processes

Key	Server	Process Number
Key 1	siebelserver1	1
Key 2	siebelserver1	2
Key 3	siebelserver2	1
Key 4	siebelserver2	2
Key 5	siebelserver2	3

However, if you created only five keys, the administrator would not be able to manually switch keys from one process to another, if one process is overloaded.

Therefore, it is recommended that you define fifty keys. Initially, you assign ten of these keys to each process. If one of the processes is overloaded, the administrator can reassign one or more keys from that process to other processes.

To set up server keys

1. Navigate to the Loyalty Program Administration screen.
2. In the link bar, click Server Key Map.
3. In the Server Key Map list, add a record for each server key and complete the necessary fields, which are described in the following table.

Field	Comments
Server Key	Enter a name for the server key.
Server Name	Enter the name of the server that will process members who have this key.
Process #	Enter the process number for this server that will process members who have this key.
# of Members Assigned	Displays the number of members assigned to this key.

To balance the load on servers

1. Navigate to the Loyalty Program Administration screen.
2. In the link bar, click Server Key Map.
3. In the Server Key Map list, change the server name (if necessary) and the process number for some of the keys being processed by server process that are overloaded.

Registering New Components as Keyed or Unkeyed

You can create new components if it is necessary for your deployment. For example, you can create different components to separate the processing of tiers and transactions.

If the new component is keyed, it creates a request for each of the unique keys (server + process number), and if the component is unkeyed, it creates only one request for the process.

New components should be unkeyed if they are used for realtime processing and keyed if they are used for batch processing.

When you create new components, to specify whether they are keyed or unkeyed, you must list them in the appropriate LOV in the LOV Administration view of the Applications Administration screen. All engine components are listed in one of the following LOVs:

- LOY_ENGINE_COMPONENT_KEYED
- LOY_ENGINE_COMPONENT_UNKEYED

Setting Up Server Components for Siebel Loyalty

There are two server components defined for the Loyalty engine:

- **eLoyalty Process Engine - Realtime.** Processes the requests from users when they click the Process button to process a transaction or tier. For each request submitted from a client, a separate Siebel task is started that processes the object exits when done.
- **eLoyalty Process Engine - Batch.** Performs back-end processing. Once started, this component runs in the background and processes objects as they are created in the database. Each of its Siebel tasks continue to wait for objects to process until the component or server is shut down.

Setting Up the Realtime Server Component

To set up the realtime component, you must configure several parameters. In addition, you can choose whether to run this component in synchronous or asynchronous mode.

Parameters of the Realtime Component

You should set the following parameters for the realtime component:

- **Maximum Tasks.** This parameter determines the maximum number of tasks the component can run. Set its value based on the number of users who will be using realtime processing through the user interface.
- **MinMTServers** and **MaxMTServers.** Set the value of these two parameters to one. This is because only one process should be running for this component in the enterprise.

Running the Realtime Component in Synchronous and Asynchronous Mode

When the user clicks the Process button, the realtime component can process the request in one of the following modes:

- **Synchronous.** The client waits for transaction processing to be completed before control is returned to the client. The user cannot do anything until the processing is completed. When control is returned to the user, the record reflects changes such as change in status or number of points.
- **Asynchronous.** The client submits a transaction and control returns to the client immediately. The user can continue working, but the user must requery the transaction to see if the processing is completed (by looking at the Status) and to check the results.

The decision about which mode to use depends on the load in the deployment. There is typically a satisfactory response time in synchronous mode with a few hundred users and a light to medium load. You should use asynchronous mode if there are thousands of users all using real time processing, which is not common.

In a typical deployment, realtime processing is not used heavily, so the application runs in synchronous mode by default.

To configure the processing mode

- Use Siebel Tools to change the user property ComponentRequestMode defined in the business service LOY Processing Engine.

  Acceptable values for this user property are *Sync* and *Async*.

Setting Up the Batch Server Component

To set up the batch component, you can configure its parameters and you can set up a workflow to start this component when the server starts.

Parameters of the Batch Server Component

You can configure the batch server component by changing the parameters that are used in processing, which are summarized in Table 5. All of the parameters in this table apply only to eLoyalty Processing Engine - Batch.

Table 5. Parameters Used in Batch Processing

Name	Display Name	Default Value	Description
LOYEngineNumberOfRuns	LOY - Engine Number of Runs	5	The number of times to query after the queue becomes empty. This parameter should the value -1 or > 0. If -1, then the engine keeps running indefinitely until it is shut down. Otherwise, it will query the specified number of times after the current query has run out of records.
LOYEngineQueueObjects	LOY - Engine Queue Objects	Transactions:90, Buckets:10	The objects to process in the queue and the number of objects to place in the queue each time. This information is displayed in the format Object1:n,Object2:m listing each object to process and the number of objects.
LOYEngineSearchSpec	LOY - Engine Search Specification	None	Currently not supported. Reserved for future use.
LOYEngineSleepTime	LOY - Engine Sleep Time (secs.)	10	The time (in seconds) for which the engine should wait after it has processed the records and there are no more records in the next query. After sleeping for that time, the engine will requery.

Starting the Batch Server Component

The batch component must be started whenever the server is started. You can automate this process by using a workflow included in the product, which can be invoked on server startup. For more information about workflows, see *Siebel Business Process Designer Administration Guide.*

To start the batch component, you must know:

- **The number of servers and number of processes on each server.** This number is determined by the administrator based on the transaction load.
- **The number of threads desired in each process.** This number is determined based on the hardware being used. For each process, at least two threads are necessary—the queue manager thread and the processing thread. There can be more than one processing thread, depending on the number of CPUs and other resources available. Having too many threads will cause an unnecessary paging and using too few threads will cause slow processing. It is best to use two or three threads per process.

NOTE: Before starting the component, be sure that the keys have been correctly defined, as described in "Setting Up Server Keys for Siebel Loyalty" on page 18.

To start the servers manually

1. Be sure that the component parameters MinMTServers and MaxMTServers are set to the Number of Processes desired on each server.
2. For each server:
   a. Calculate (# of processes on server) x (1 + # of Processing Threads/Process)
   b. Submit this number of component requests for the eLoyalty Processing Engine - Batch.

   You can submit these component requests from the User Interface or from the server manager.

To use a workflow to start the servers

1. In the Siebel Business Process Administration screen, set up the workflow LOY Engine - Start Engine workflow by specifying the following two process properties:
   - NumberOfProcesses
   - NumberOfProcessingThreadsPerProcess.
2. Activate this workflow.

   This workflow will submit the component requests to start the required number of processes.

Activating Workflows for Siebel Loyalty

Many features of Siebel Loyalty are driven by Siebel workflows. You can modify these workflows to change the behavior of the product.

Before using Siebel Loyalty, you must activate these workflows to make these features available. These are the workflows with names that begin with *LOY*.

For information about activating workflows, see *Siebel Business Process Designer Administration Guide.*

Process of Setting Up Partner Access to Siebel Loyalty

By using the Partner Portal, partners can perform many of the same tasks as member service representatives who are your own employees. For more information, see Chapter 7, "Partner Use of Siebel Loyalty."

To set up partner access to Siebel Loyalty:

- **Set up Siebel PRM.** Follow the instructions in the section about setting up Siebel PRM in *Siebel Partner Relationship Management Administration Guide*. This section contains high-level instructions for installing, configuring, and controlling visibility.
- **Add Partner Companies and Employees.** Follow the instructions in the section about working with new partners in *Siebel Partner Relationship Management Administration Guide*. This section contains instructions for adding the partner companies and partner employees who will use the portal. You can add the partner employees yourself, or you can just add one employee as delegated administrator at the partner company and allow that employee to add other employees at that company.

In addition to the general instructions that you will find in *Siebel Partner Relationship Management Administration Guide*, to add partner companies, you must also perform the following extra tasks that are specific to Siebel Loyalty:

- "Setting Up Loyalty Partner Point Conversion" on page 23
- "Entering the Loyalty Partner Program Profile" on page 24
- "Mapping Loyalty Partner Tiers to Company Tiers" on page 24
- "Selling Loyalty Points to New Partners" on page 25

Setting Up Loyalty Partner Point Conversion

To give members points, many partners will send you transaction data, which you will use to calculate the number of points that the member earned in your loyalty programs or promotions. For these partners, you do not have to set up point conversion.

However, some partners will send you information about how many points in the partner's loyalty program members earned for transactions. For these partners, you should set up the integration server, which maps the partner's application to your application, so it converts partner points to your points.

You must agree with a partner on a conversion factor, which you should store in the Attachment view of the Partners screen. You must include this conversion factor when you set up the integration server.

This task is a step in "Process of Setting Up Partner Access to Siebel Loyalty" on page 23.

Entering the Loyalty Partner Program Profile

In order to help you understand a partner's loyalty program, you can enter information in the partner program profile. This only applies to partners who have their own loyalty programs.

This task is a step in "Process of Setting Up Partner Access to Siebel Loyalty" on page 23.

To enter the partner program profile

1. Navigate to the Partners screen.
2. Select the record for the partner company whose profile you want to enter.
3. Click the Partner Programs view tab.
4. Add a new record to the Partner Programs list for each of the partner's loyalty programs, and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Name	Enter the name of the partner's loyalty program.
Hosted By	Enter the name of the host organization for this program.
Promotion Calculation	Enter the method that the partner uses to calculate points.
Start Date	Enter the date the partner began offering its program.

Mapping Loyalty Partner Tiers to Company Tiers

If your company and the partner have agreed to give preferential treatment to members of each other's reward programs based upon tier status, then you must map the partner's tiers to your tiers.

For example, your highest tier may be named Platinum member, and the partner's highest tiers may be named special preferred member. You must specify that these tiers are equivalent.

This task is a step in "Process of Setting Up Partner Access to Siebel Loyalty" on page 23.

To map the partner's tiers to your company's tiers

1. Navigate to the Partners screen.
2. Select the record for the partner company whose tiers you want to enter.
3. Click the Tier Relationships view tab.

4 Add a new record to the Tier Relationships Tiers list for each of the partner's tiers, and enter information about the tier. Some fields are described in the following table.

Field	Comments
Partner Tier	Enter the name of the partner tier.
Program	Select the name of your loyalty program whose tiers you will map to this partner tier.
Program Tier	Select the name of the tier in your loyalty program that is equivalent to this partner tier.

Selling Loyalty Points to New Partners

Partners must purchase points from you, so they can give those points to members who earn rewards by making purchases. You must sell points to new partners when you enroll them. You continue to sell points to partners whenever they use up their balance of points by giving them to members as rewards.

For more information about selling points to partners, see "Selling Loyalty Points to Partners" on page 144.

This task is a step in "Process of Setting Up Partner Access to Siebel Loyalty" on page 23.

Setting Up Customer Access to Siebel eLoyalty

By using Siebel eLoyalty, anonymous customers and members can perform many tasks for themselves, such as enrolling as a member, signing up for a promotion, and redeeming points for rewards. For more information, see Chapter 8, "Member Self-Service with Siebel eLoyalty."

Setting Up Member Access

To allow anonymous users and members to use the Loyalty Member Portal:

- You must set up authentication, access, and data privacy.
- You can configure the Member Portal so it has the same look and feel as your company Web site.

You perform these tasks for the Member Portal in the same way that you perform them for Siebel eSales.

For more information about providing access to the Member Portal, see *Siebel eSales Administration Guide*.

Setting Up Self-Service Redemption

Members can use the Member Portal to redeem points for rewards.

There are two ways members can redeem points:

- **Using a Siebel Catalog.** In most cases, the members redeem points by making purchases from a Siebel catalog and paying in points, which are deducted from the member's account. This catalog works like the Siebel Sales catalog, except that the credit card processing page is eliminated. For more information about setting up catalogs, see *Siebel eSales Administration Guide*.
- **Using an External System.** In some cases, businesses already have systems set up for selling products on line. For example, the airline industry uses a Global Distribution System (GDS) to allow customers to make reservations and pay for flights on line. These external systems can be integrated with Siebel Loyalty Member Portal, so members can use the page from the external system to redeem points within the Member Portal.

Viewing the Processing Status for Loyalty Transactions

You can see if a transaction has succeeded or the reason it has been rejected by using the Processing Info view. This is useful while you are setting up and testing the product. You can also create responsibilities that expose this view to member service representatives, so they can see why transactions were rejected by the application.

To view the result of a loyalty transaction

1. Navigate to the Transactions screen.
2. In the Transactions list, select the transaction whose result you want to view.

3 Click the Processing Info view tab.

The values in the Status field of the Transaction record and Processing Substatus field of the Processing Info record specify the result of the transaction, as described in the following table.

Status	Processing Substatus	Comments
Processed	Success	The transaction was processed successfully and qualified for some promotions.
Processed	No Promotions Qualified	The transaction was processed successfully, but it did not qualify for any promotions.
Rejected - Engine	Insufficient Member Balance	The redemption transaction was rejected because the member did not have a large enough point balance.
Rejected - Engine	Insufficient Point Blocks	The accrual transaction was rejected because there were not enough points in the partner point blocks.
Rejected - Engine	Program Inactive	The transaction was rejected because the program to which the member belongs is inactive.
Rejected - Engine	Attribute Definition Inactive	The transaction was rejected because it attempted to use a promotion whose criteria or action use an attribute definition that is not available for this transaction.
Rejected - Engine	Error	The transaction was rejected because of a generic error that is not specific to Siebel Loyalty. For example, a field of the business component required for the transaction may not have been properly configured. This situation may occur when the customer has deployed a new SRF.

4 Setting Up Siebel Loyalty Programs

This chapter discusses loyalty programs and how to set them up. It includes the following sections:

About Siebel Loyalty Programs

Loyalty programs give members bonus points as rewards for their purchases or for other behavior. Examples of loyalty programs are:

- Airline frequent flyer programs that give members bonus miles or that give members discounts on hotel stays or car rentals.
- Supermarket programs that give bonus points to shoppers.
- Programs that give bonus points to retailers based on their sales of a manufacturer's products.

This chapter describes how to set up loyalty programs.

Before you set up a loyalty program, you should analyze your customer base to see which customers the program should be designed to appeal to. For example, if an airline finds that half of its revenues come from 10 percent of its customers, it would design the program to appeal to these frequent flyers. For more information, see "Siebel Loyalty Life Cycle" on page 10.

After setting up a program, you can set up promotions for that program, which give members bonus rewards beyond the usual program rewards for behavior that you want to encourage. For more information, see Chapter 5, "Setting Up Siebel Loyalty Promotions."

About Loyalty Program Points, Tiers, and Rewards

Loyalty programs give members points for purchases or for other behavior. Members benefit from earning points in two ways:

- Redeeming points for rewards
- Qualifying for tier status

Redeeming Points for Rewards

Members can redeem these points for rewards, such as products. For example, a program may give members frequent flyer miles that they can redeem for airplane flights. Another program may give members training points that they can redeem for free training.

When you define products, you specify how many points members can earn by purchasing the products. You also define how many points the members must redeem to purchase the product.

Qualifying for Tier Status

Members can also qualify for tier statuses, such as Silver Member, Gold Member, or Platinum Member, by earning a specified number of qualifying points in a specified time.

Most loyalty programs give members two types of points:

- **Qualifying points.** Can be redeemed for rewards and also count toward earning tier status.
- **Nonqualifying points.** Can be redeemed for rewards and do not count toward earning tier status.

Tiers can be an important incentive, because you can reward members for their tier status by giving them vouchers, special membership cards, and special lounge privileges when then reach a new tier.

About Promotion Calculation Rules for Loyalty Programs

When loyalty administrators create loyalty programs, they must define a promotion bonus calculation rule for each program. This rule decides how the point bonus is calculated if several promotions are in effect at the same time.

If several promotions apply to one transaction, loyalty programs can give the member the bonuses for all the promotions, or they can reduce the number of points they give away by giving the member one or some of the bonuses.

NOTE: When loyalty administrators create promotions, they can select an Always Apply check box. If it is selected, the member will receive that promotion even if it would not be included according to the promotion calculation rule.

To define the promotion calculation rule, you select one of four options:

- **Maximize by Promotion.** Only one promotion applies, which is the promotion that is most beneficial for the member. If all promotions generate the same type of points, the one with the largest number of points applies. If the promotions generate different types of points, some qualifying and some nonqualifying, the program decides which is most beneficial to the member by calculating a weighted average of the points awarded by different promotions; loyalty administrators determine the weighting when they define the point types, as described in "Defining Point Types for Loyalty Programs" on page 34.

- **Maximize by Point Type.** Only one promotion applies to generate points of each type. Multiple promotions can apply, if they generate points of different types. The program decides which promotion is used to generate points of each type by calculating which promotion is most beneficial to the member for each point type.
- **Maximize by Point Type - Qual/Non-Qual.** Only one promotion applies to generate qualifying or non-qualifying points of each type. The calculation is similar to Maximize by Point Type, except that qualifying and non-qualifying points for each type are calculated and awarded separately.
- **All Promotions Apply.** The member receives the combined total of all points from all available promotions. All promotions are calculated on the base points, not compounded. For example, if one promotion gives 50 percent bonus points, and another promotion gives 100 percent bonus points, the customer gets a total of 150 percent bonus points.

Example of Promotion Calculation Rules

As an example of how these different rules affect promotion calculations, consider a case where a transaction qualifies for four promotions.

In this example, Promotion 1 is of the type Always Apply, so accruals generated by this promotion apply regardless of which rule is followed.

The promotion calculation rules determine how the other promotions apply. The weighting used by these rules is shown in Table 6.

Table 6. Weighting Used by Promotions in Example

Point Type	Qualifying Weight	Nonqualifying Weight
Base	1.0	0.5
Bonus	0.8	0.4

The last three columns of Table 7 show which points the member receives if you use different promotion calculation rules. In addition to Promotion 1, which always applies, the following promotions apply:

- **Maximize by Promotion.** Promotion 4 applies, because it has the maximum weighted average for Base points and Bonus points.
- **Maximize by Point Type.** Promotion 4 applies for Base points, because it has the maximum weighted value for that type, and Promotion 4 applies for Bonus points, because it has the maximum weighted value for that type. The weighted value is applied separately for the two different point types. Even though Promotion 2 generated 700 NQ Bonus points, these points were not applied, because the 550 Q Bonus points generated by Promotion 4 have a higher weighted value due to the difference in the qualifying and non-qualifying weights.

- **Maximize by Point Type Q/NQ.** Promotion 2 and Promotion 4 apply for both Base points and Bonus points. For each point type and qualifying/non-qualifying combination, the one with the maximum weighted value is applied. That is four combinations in this example.

Table 7. Points Applies with Different Calculation Rules

Promo	Point Type	Amount	Weighted	Weighted Promo	By Promo	By Point Type	By Point Type Q/NQ
1	Base	250 Q	250.0	390.0	Y	Y	Y
1	Bonus	350 NQ	140.0		Y	Y	Y
2	Base	225 NQ	112.5	392.5			Y
2	Bonus	700 NQ	280.0				Y
3	Base	125 NQ	62.5	102.5			
3	Bonus	100 NQ	40.0				
4	Base	225 Q	225.0	665.0	Y	Y	Y
4	Bonus	550 Q	440.0		Y	Y	Y

Process of Setting Up Loyalty Programs

To set up a loyalty program, the loyalty administrator performs the following tasks:

1. "Creating Loyalty Programs" on page 33
2. "Defining Program Level Attributes for Loyalty Promotions" on page 33
3. "Defining Point Types for Loyalty Programs" on page 34
4. "Minting Point Blocks for Loyalty Programs" on page 35
5. "Defining Membership Card Types" on page 37
6. "Defining Tier Classes and Tiers" on page 37
7. "Setting Up Tier Promotions" on page 42
8. "Creating Vouchers for Loyalty Members" on page 42
9. "Defining Vouchers as Tier Rewards" on page 43
10. "Defining Loyalty Features of Products, Price Lists, and Catalogs" on page 43
11. "Creating Base Loyalty Promotions" on page 45

Creating Loyalty Programs

As the first step in setting up a loyalty program, the loyalty administrator creates a new Loyalty Program record and enters general information about the program.

This task is a step in "Process of Setting Up Loyalty Programs" on page 32.

To create a loyalty program

1 Navigate to the Loyalty Program Administration screen.

2 Add a new record to the Loyalty Programs list, and complete the necessary fields in the record and in the More Info form. Some fields are described in the following table.

Field	Comments
Hosted By	Select the company that is implementing this program. If the program is implemented by the brand owner company, select the brand owner company. If the program is outsourced to a partner company, select the name of partner. If programs are implemented by business units of the brand owner company, you can create an account for each business unit and select the appropriate one.
Partner Flag	Select this check box if the program is implemented by a partner. Leave it deselected if the program is implemented by your own company.
Promotion Calculation Rule	Select the method used to calculate points when multiple promotions are in effect. For more information, see "About Promotion Calculation Rules for Loyalty Programs" on page 30.
Start Date	Enter the date and time when the program goes into effect.
End Date	Enter the date and time when the program is no longer in effect. If this field is blank, the program remains in effect indefinitely.

Defining Program Level Attributes for Loyalty Promotions

Attributes are used when you create promotions.

You can define program level attributes that are available to all promotions in a program by using the Program Level Attributes view of the Loyalty Program Administration screen.

When you create a promotion, you can also define promotion-specific attributes that are available to only one promotion.

You can define program level attributes while you are setting up the program, or you can wait until you are planning promotions for the program.

For more information about defining attributes, see "Creating Attributes for Loyalty Promotions" on page 86.

This task is a step in "Process of Setting Up Loyalty Programs" on page 32.

Defining Point Types for Loyalty 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.

This task is a step in "Process of Setting Up Loyalty Programs" on page 32.

Some loyalty programs have only one point type. For example:

- Most frequent flyer programs only have points that can be redeemed for free flights.
- Most hotel loyalty programs only have points that can be redeemed for hotel accommodations.

These points may be qualifying or non-qualifying toward a tier status, but they are all the same type because they are all used for the same thing.

Some loyalty programs have multiple point types. When members do different things, they are given points that they can redeem for different types of rewards. For example, a loyalty program aimed at partners may have these types of points:

- **General Points.** Purchasing products may earn general points, which can be redeemed for free gifts.
- **Training Points.** Attending conferences may earn a member training points, which can be redeemed for free training courses.
- **Marketing Points.** Paying for advertisements that help promote the brand owner's products may earn marketing points, which can be used to earn a spot on the advertisements the brand owner pays for.

To define point types

1. Navigate to the Loyalty Program Administration screen.
2. In the Loyalty Programs list, select the program that the point types are used by.
3. Click the Point Types view tab.
4. Add a new record to the Point Types list for each point type, and complete the necessary fields, described in the following table.

Field	Comments
Name	Enter a name for the point type.
Active	Select this check box to make this point type available to the program.

Field	Comments
Field to Use	Select the field in the Members screen that will be used to display the number of points a member has of this point type. Options are Point 1, Point 2, Point 3, and Point 4.
Qualifying Weight	Enter a weight that will be used to calculate which promotion will apply if multiple promotions are available. For more information, see "About Promotion Calculation Rules for Loyalty Programs" on page 30.
Non-Qualifying Weight	Enter a weight that will be used to calculate which promotion will apply if multiple promotions are available. For more information, see "About Promotion Calculation Rules for Loyalty Programs" on page 30.

Minting Point Blocks for Loyalty Programs

To make points available for use, you must mint blocks of points when you first set up the program and periodically during the life of the program. *Minting* a point block is the process of creating and approving that point block.

This task is a step in "Process of Setting Up Loyalty Programs" on page 32.

Each point block is created for use by the brand owner company or by a partner company. Partner companies buy points, as described in "Selling Loyalty Points to Partners" on page 144.

Creating Point Blocks

The loyalty administrator creates the point blocks and submits them to the mint manager for approval.

To create point blocks

1. Navigate to the Loyalty Program Administration screen.
2. In the Loyalty Programs list, select the program that uses the points.
3. Click the Point Blocks view tab.

4 Add a new record to the Point Types list, and complete the necessary fields, described in the following table.

Field	Comments
Partner Point Block	Select this check box if the point block is to be used by a partner.
Partner/Host	Select the company that will use these points. If the brand owner will use them, select the brand owner company. If a partner will use them, select the name of the partner. If programs are implemented by business units of the brand owner company, you can create an account for each business unit and select the appropriate one.
Point Type	Select the point type. For more information about point types, see "Creating Point Types for Loyalty Programs" on page 14.
Original # of Points	Enter the total number of points in this point block.
Points Remaining	Displays the number of points remaining in the block after subtracting those that have been used in transactions.
Cost Per Point	Enter your internal cost of the points. This value is useful for calculating margin and calculating outstanding liability for tax purposes.
Sales Price Per Point	If the points will be sold to partners, enter the sales price of the points.
Submitted To	Select the name of the mint manager who must approve this point block.
Status	To submit the new block for approval, select Submitted.

Approving Point Blocks

After the loyalty manager creates the point block, the mint manager must approve it. The engine will use only approved blocks during processing.

To approve point blocks

1 Navigate to the Point Blocks screen.

2 In the Point Blocks list, use a query to find all point blocks with the value Submitted in the Status field.

3 To approve a point block, select Approved in Status field.

Checking the Points Remaining in a Block

When it has been approved, all the fields in the mint block become read-only, so they cannot be edited.

In the Points Remaining field, users can see the calculated value of the number of points in the block that have not been distributed. Loyalty administrators should check periodically to see which blocks have few points remaining, so they can create new point blocks as replacements.

To check the points remaining in blocks

1. Navigate to the Point Blocks screen.
2. In the Point Blocks list, use a query to find all point blocks with a small value in the Points Remaining field.

Defining Membership Card Types

Before you define tiers, you must define membership card types, so you can select the appropriate membership card type for each tier. For example, you may define the membership card types Platinum, Gold, and Silver, so you can select these for the Platinum, Gold, and Silver tiers.

When you define tiers, you select the membership card type for each tier from a list of values. You define the content of this list of values in the List of Values Administration view.

This task is a step in "Process of Setting Up Loyalty Programs" on page 32.

To define membership card types

1. Navigate to the Administration - Data screen.
2. In the link bar, click List Of Values.
3. For each membership card type, add a new record to the List of Values list, and complete the necessary fields, as described in the following table.

Field	Comments
Type	Enter LOY_MEMBER_CARD_TYPE.
Display Value	Enter the name of the card type. This name will be displayed in the list of values for this membership card type.
Language Independent Code	Enter the Language Independent Code for the card type.
Language	Enter the language that the display value is displayed in.

Defining Tier Classes and Tiers

While creating a new program, the loyalty administrator defines tier classes and tiers for the program:

- **Tier Classes.** Multiple tier classes are used if you have different tiers for different types of members. For example, an airline frequent flyer program may have different tiers for members flying business class and first class. Then the airline would define two tier classes, and it would define a set of tiers for each tier class.
- **Tiers.** In most loyalty programs, members earn the right to be in certain tiers, 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 must define at least one tier class. You must define tiers for each class you define.

CAUTION: Do not change the names of tier classes after you have activated them.

NOTE: When there are multiple tier classes in a program, the program decides which is the dominant tier for a member by querying for all tiers for the member that have the Show Flag = Y and that were active at the time of the transaction date. Of these tiers, the one whose tier class has the lowest sequence number is the dominant tier for the member. If multiple tiers are found for the same tier class, then the one that was approved the last is considered, as it is deemed to be the most recent valid tier. If there were no tiers active at the time of the transaction date, then the current active tiers are used. You can change the behavior to always use the current active tiers if desired, by defining a System Preference with the name LOYUseTransactionDateTier and the value N.

This task is a step in "Process of Setting Up Loyalty Programs" on page 32.

To get into a tier, members must earn a specified number of qualifying points within a specified time. This time is called the qualifying period. When you define tiers, you specify the number of qualifying points needed to qualify for the each tier and the qualifying period that members have to earn those points.

Because many loyalty programs send statements more frequently to members in higher tiers, you also use tier definitions to specify when statements are sent.

To define tier classes and tiers

1. Navigate to the Loyalty Program Administration screen.
2. In the Loyalty Programs list, select the program that the tiers are used by.
3. Click the Tier Classes view tab.
4. Add a new record to the Tier Classes list, and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Sequence	Enter a number indicating how high the status of this tier class is compared with other tier classes. For example, a frequent flyer program may include standard = 1, business class =2, first class = 3.
Primary Tier Name	Select the lowest tier in this tier class, which is the tier that members are in when they first enroll. This value can only be specified after the tiers have been created for this class, and it should be specified before activating the tier class.

Field	Comments
Start Qualifying Period	Select when the qualifying period starts. The options are: ■ **Enrollment Date.** The qualifying period starts on the day the member enrolls and continues for the length of time specified in the Tiers list. ■ **First Day of Month.** The qualifying period starts on the day the member enrolls and continues for the specified time after the first day of the following month. For example, if the member enrolls on March 17 and the specified length of time is one year, the qualifying period lasts from March 17 until April 1 of the next year. ■ **January 1.** Regardless of sign-up date, the member has the remainder of the year as the qualifying period ends at the end of the year. For example, if the member enrolls on March 17 and the specified length of time is one year, the qualifying period lasts from March 17 to January 1 of the following year. If you choose this option, you must choose values for length of time in the Tiers list that are multiples of one year (that is, 12 months, 24 months, or 36 months). **NOTE:** If you want a tier class to be based on the lifetime points a member has earned, leave the fields Start Qualifying Period and Restart Qualifying Period blank for that tier class. By doing this, you essentially create one qualifying period for the member's entire time as a member.

<table>
<tr><th>Field</th><th>Comments</th></tr>
<tr><td>Restart Qualifying Period</td><td>Select when the length of time for the new qualifying period starts after a tier status change. For example, if a member changes from the Silver tier to the Gold tier, this field specifies when the length of time will start to qualify for the Platinum tier.

The options are:

■ Qualifying Period Expiration. The length of time for the new qualifying period starts at the expiration of the current qualifying period. For example, the qualifying period for a member to qualify for the Gold tier ended on December 31, 2003, the member actually qualified for the Gold tier on August 17, 2003, and the length of time to qualify for Platinum tier is one year. Then the member has from August 17, 2003 until December 31, 2004 to qualify for the Platinum tier.

■ Tier Status Change. The length of time for the new qualifying period starts immediately when the tier changes. For example, if a member changes from Silver tier to Gold tier on August 17, 2003, and if the length of time to qualify for the Platinum tier is one year, the member will have from August 17, 2003 until August 17, 2004 to qualify for the Platinum tier.

NOTE: Do not choose Tier Status Change if you choose Jan. 1 or First Day of Month in the Start Qualifying Period field. These two combinations do not make sense logically. Choose Tier Status Change only if you choose Enrollment Date in the Start Qualifying Period field.</td></tr>
</table>

5 Add a new record to the Tiers list, and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Sequence	Enter a number indicating how high the status of this tier is compared with other tiers. For example, a program may include standard = 1, Silver =2, Gold = 3, Platinum = 4.
Qualifying Period Length and Qualifying Period UoM	Enter the length and unit of measurement for the initial qualifying period for this tier. For example, if the qualifying period is one year, the length = 1 and UoM = Year. If the qualifying period is six months, length = 6 and UoM = Month.

Field	Comments
Requal Period Length and Requal Period UoM	Enter the length and unit of measurement for the qualifying period for existing members to remain in this tier. Usually, this is the same as the initial qualifying period. For example, if a member must earn 10,000 points in a year to initially qualify for the Platinum tier, the member must continue to earn 10,000 points per year to remain in the Platinum tier.
Qual Point Expiration Length and Qual Point Expiration UoM	Enter the length and unit of measurement when qualifying points expire for members of this tier. For example, if qualifying points expire two years after they are earned, the length = 2 and UoM = Year. After points expire, the member can no longer exchange them for rewards. If points should never expire, deselect the Expire Points check box.
Non-Qual Point Expiration Length and Non-Qual Point Expiration UoM	Enter the length and unit of measurement when non-qualifying points expire for members of this tier. If points should never expire, deselect the Expire Points check box.
Calculation Snap To	Select when the period starts that is used to determine whether points expire. Select Calculated date to start on the date when the points are earned. Select 1st Day of Next Month, Quarter, or Year to start on the specified date after the points are earned.
Statement Frequency	Select how frequently statements are sent to members of this tier. Many loyalty programs send statements more frequently to members of higher tiers. For more information about statements, see "Viewing or Printing Loyalty Members' Statements" on page 137.
Only If Activity	If this check box is selected, a statement will only be sent if an accrual or redemption activity has occurred since the last one was sent.
Show Flag	Select this check box to display the tier on the Web site.
Expire Points	Deselect this check box if points should never expire for members of this tier. This overrides the specifications in the fields that indicate when points expire.
Lounge	Select the lounge that members of this tier are allowed to use. This field is used by airlines that give members of their frequent flyer plans the right to use special lounges.
Card Type	Select the membership card type for this tier.

Field	Comments
Demotion Tier	Select the tier that members will be demoted to if they fail to earn enough points to requalify for this tier during the requalifying period. If no value is selected here, members will be demoted to the tier that they qualify for based on the number of points they earned during the requalifying period.
Lowest Demotion Tier	Select the lowest tier that members of this tier can ever be demoted to, if applicable. For example, you might have a rule saying that if members have reached the Platinum tier, they can never be demoted to lower than the Silver tier.
Grace Period Length and Grace Period UoM	These fields apply only if points never expire for this tier. Enter values to specify the period that members have to use their points after they are demoted to a tier where points do expire.

6. To enter notes about the tiers in this tier class, click the Tier Notes view tab, add a new record to the Tier Notes list, and complete the necessary fields.
7. If your loyalty program has different sets of tiers for different customers, repeat Step 4, Step 5, and Step 6 until you have defined all of the sets of tiers in the program.

Setting Up Tier Promotions

You must set up tier promotions, which contain the rules that move members to the appropriate tier, based on their attributes or on the number of points they have.

Before you create tier promotions, you should have a general understanding of how to create promotions, described in Chapter 5, "Setting Up Siebel Loyalty Promotions," and about how to create tier promotions, described in "About Creating Loyalty Tier Promotions" on page 85.

For a detailed example of how to create the tier promotions needed by a sample loyalty program, see "Example of Creating Tier Promotions" on page 55.

Creating Vouchers for Loyalty Members

You must create vouchers:

- If member service representatives give vouchers to members, such as to compensate them for missed flights.
- If you are setting up a loyalty program that gives members vouchers as rewards when they enter a new tier.

In either case, you must create the vouchers when you set up the program, and you must continue to create vouchers periodically, as the existing ones are used up.

For more information about vouchers, see "Giving Vouchers to Loyalty Members" on page 130.

This task is a step in "Process of Setting Up Loyalty Programs" on page 32.

You create vouchers as products. In the Type field of the Product record, select *Electronic Voucher*.

For more information about creating products, see *Product Administration Guide*.

Defining Vouchers as Tier Rewards

When members reach a new tier, you can reward them by giving them vouchers. A voucher entitles a member to a specific product. For example, a voucher might entitle a member to an upgrade on an airline flight or on an automobile rental.

After creating these vouchers, the loyalty administrator must associate them with tiers. When a member enters a tier, the member automatically receives the voucher associated with that tier.

This task is a step in "Process of Setting Up Loyalty Programs" on page 32.

NOTE: In addition to being rewarded with vouchers, members can be rewarded with special membership cards and special lounge privileges when they reach a new tier. Membership cards and lounge privileges for tiers are not defined in the Tier Rewards view. They are defined in the Tiers form, described in "Defining Tier Classes and Tiers" on page 35.

To associate vouchers with tiers

1. Navigate to the Loyalty Program Administration screen.
2. In the Loyalty Programs list, select the program that the tier rewards are used by.
3. Click the Tier Rewards view tab.

   The upper Tier Rewards list includes all of the tiers that were defined for this program in the Tier Classes view. In the lower Tier Rewards list, you specify one or more vouchers associated with each of these tiers.
4. In the upper Tier Rewards list, select a tier.
5. Add one or more new record to the lower Tier Rewards list, and complete the necessary fields to specify one or more vouchers associated with this tier.
6. Repeat Step 4 and Step 5 to associate rewards with all the tiers.

Defining Loyalty Features of Products, Price Lists, and Catalogs

Every product in the loyalty program must be defined in the Siebel application:

- Airline companies define every possible Airport Code pair as a separate product. Each of these must have a base price defined in a price list. They can also have discounts, defined in Siebel Pricer.
- Retail companies define and maintain all products in the Siebel application.

- You can create products that are points. For example, customers might be able to purchase 15,000 points for $150. When a member purchases this product, the Siebel application automatically credits the member with those points.

In addition to the usual tasks for defining products and prices, there are special fields used in loyalty products that the loyalty administrator and the product administrator should work together to define.

These fields control:

- How many points a member earns for purchasing a product.
- How many points are required to redeem a product.

These fields must be used together with the other features of the Administration - Product screen when you define products.

After defining the products, you create catalogs of these products, which are used by salespeople and member service representatives to sell the product, and by members who purchase the product through the Web.

This section only covers Loyalty features of product and pricing administration.

For more information about the other features of product and pricing administration, see *Product Administration Guide* and *Pricing Administration Guide*.

For more information about creating catalogs, see *Siebel eSales Administration Guide*.

This task is a step in "Process of Setting Up Loyalty Programs" on page 32.

To define loyalty features of products

1. Navigate to the Administration - Product screen.
2. Add a new record to the Products list, and complete the necessary fields. The fields in the Loyalty section of the More Info form are described in the following table.

Field	Comments
From Airport To Airport	Airline companies use these two fields to define every possible Airport Code pair as a separate product. This data can be imported from the IATA Ticketed Point Mileage Manual.
Actual Distance Distance UoM	Airline companies use these two fields to define the distance traveled for every possible Airport Code pair. This data can be imported from the IATA Ticketed Point Mileage Manual.
Expiration Length Expiration UoM	Use these two fields to define how long the points are valid before they expire. Fore example, if the points expire after six months, enter 6 in the Expiration Length field, and select month in the UoM field.
Suggested Accrual Points	Enter the base number of points the member gets for purchasing the product. The actual number of points the member gets is also affected by promotions.

Field	Comments
Suggested Accrual Point Type	Select the type of point the member accrues by purchasing this product.
Suggested Accrual Price	Enter a price for the points accrued by purchasing this product.
Suggested Redemption Points	Enter the number of points the member must redeem to receive this product.
Suggested Redemption Point Type	Enter the point type the member must redeem to receive this product.
Suggested Redemption Price	Enter a price for the points used to redeem this product.

3. Perform other necessary product and pricing administration, as described in *Product Administration Guide* and *Pricing Administration Guide*.
4. Create product catalogs, as described in Siebel *Siebel eSales Administration Guide*.

Creating Base Loyalty Promotions

When you define a program, you must create base promotions to perform the basic processing for the program, such as:

- Adding points to members' balances when they perform accrual transactions.
- Subtracting points from members' balances when they perform redemption transactions.
- Updating vouchers when members perform transactions that use vouchers.

These base promotions apply to every transaction of every member of the program. You should not make them visible to members as promotions. They perform processing in the background.

You must create the following promotions for each program:

- Admin - Loan
- Admin - Accruals
- Admin - Gift
- Admin - Redemptions
- Admin - Cancellation
- Admin - Voucher

This task is a step in "Process of Setting Up Loyalty Programs" on page 32.

For more information about promotions, see Chapter 5, "Setting Up Siebel Loyalty Promotions."

To create the Admin - Loan base promotion

1. Navigate to the Loyalty Promotions Administration screen.

2 Add a new record to the Loyalty Promotions list, and enter the values that are provided in the following table.

Field	Value
Name	Admin - Loan
Always Apply	Y
Apply To	Loan
Program	<Enter the name of the program.>
Partner	<Enter the partners for the program.>
Promotion Start	<Enter one day before today’s date.>
Promotion End	<Leave this field blank, because you do not want the base promotion to expire.>

3 Click the Promotion # field.

4 Click the Rules view tab.

5 Create the first rule for this promotion, which assigns points when the loan is made:

a Add a new record to the Rules list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Loan
Rule Applies To	Transactions

b Click the Rule name.

c Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Loan
Type of Comparison	Compare to Values
Object	Transaction
Attribute	Transaction Sub Type
Condition	Equals
Value	Loan

d Click the Actions view tab.

e Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Loan
Type	Assign Points
Use From Transaction	Y
Object	Transaction
Attribute	Transaction Points

6 Create the second rule for this promotion, which redeems points when the loan is repaid:

a In the threadbar, click Promotion:Admin - Loan.

b Add a new record to the Rules list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Loan Repayment
Rule Applies To	Transactions

c Click the Rule name.

d Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Loan Repayment
Type of Comparison	Compare to Values
Object	Transaction
Attribute	Transaction Sub Type
Condition	Equals
Value	Loan Repayment

e Click the Actions view tab.

f Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Loan Repayment
Type	Redeem Points
Use From Transaction	Y
Object	Transaction
Attribute	Transaction Points

To create the Admin - Accruals base promotion

1 Navigate to the Loyalty Promotions Administration screen.

2 Add a new record to the Loyalty Promotions list, and enter the values in the following table.

Field	Value
Name	Admin - Accruals
Always Apply	Y
Apply To	Accrual-Product
Program	<Enter the name of the program.>
Partner	<Enter the partners for the program.>
Product Inclusion	All Products
Point Limited Type	Unlimited
Promotion Start	<Enter one day before today’s date.>
Promotion End	<Leave this field blank, because you do not want the base promotion to expire.>

3 Click the Promotion # field.

4 Click the Rules view tab.

5 Create the rule for this promotion:

a Add a new record to the Rules list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Check Points
Rule Applies To	Transactions

b. Click the Rule name.

c. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Check Points
Type of Comparison	Compare to Values
Object	Transaction
Attribute	Transaction Points
Condition	Is Greater Than
Value	0

d. Click the Actions view tab.

e. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Give Points
Type	Assign Points
Use From Transaction	Y
Object	Transaction
Attribute	Transaction Points

To create the Admin - Gift base promotion

1. Navigate to the Loyalty Promotions Administration screen.
2. Copy the Admin - Accruals promotion created in the previous procedure.
3. In the new Loyalty Promotions record, the following values should be different from the values in the Admin - Accruals promotion.

Field	Value
Name	Admin - Gift
Apply To	Accrual-Gift

To create the Admin - Redemptions base promotion

1. Navigate to the Loyalty Promotions Administration screen.

2 Add a new record to the Loyalty Promotions list, and enter the values in the following table.

Field	Value
Name	Admin - Redemptions
Always Apply	Y
Apply To	Redemption-Product
Program	<Enter the name of the program.>
Partner	<Enter the partners for the program.>
Product Inclusion	All Product
Point Limited Type	Unlimited
Promotion Start	<Enter one day before today's date.>
Promotion End	<Leave this field blank, because you do not want the base promotion to expire.>

3 Click the Promotion # field.

4 Click the Rules view tab.

5 Create the rule for this promotion:

  a Add a new record to the Rules list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Check Points
Rule Applies To	Transactions

  b Click the Rule name.

  c Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Check Points
Type of Comparison	Compare to Values
Object	Transaction
Attribute	Transaction Points
Condition	Is Greater Than
Value	0

d Click the Actions view tab.

e Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Redeem the Points
Type	Redeem Points
Use From Transaction	Y
Object	Transaction
Attribute	Transaction Points

To create the Admin - Cancellation base promotion

1. Navigate to the Loyalty Promotions Administration screen.
2. Add a new record to the Loyalty Promotions list, and enter the values in the following table.

Field	Value
Name	Name: Admin - Cancellation
Always Apply	Always Apply: Y
Apply To	Apply To: Cancellation
Program	<Enter the name of the program.>
Partner	<Enter the partners for the program.>
Product Inclusion	Product Inclusion: All Product
Point Limited Type	Point Limited Type: Unlimited
Promotion Start	<Enter one day before today's date.>
Promotion End	<Leave this field blank, because you do not want the base promotion to expire.>

3. Click the Promotion # field.
4. Click the Rules view tab.
5. Create the rule for this promotion:

a Add a new record to the Rules list, and enter the values in the following table.

Field	Value
Sequence	1

Field	Value
Name	Invoke Cancel Action
Rule Applies To	Transactions

b. Click the Rule name.

c. Click the Actions view tab.

d. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Invoke Cancel
Type	Cancel Transaction

To create the Admin - Voucher base promotion

1. Navigate to the Loyalty Promotions Administration screen.
2. Add a new record to the Loyalty Promotions list, and enter the values in the following table.

Field	Value
Name	Admin - Voucher
Always Apply	Y
Apply To	Voucher
Program	<Enter the name of the program>
Partner	<Enter the partners for the program>
Product Inclusion	All Product
Promotion Start	<Enter one day before today’s date>
Promotion End	<Leave this field blank, because you do not want the base promotion to expire.>

3. Click the Promotion # field.
4. Click the Rules view tab.
5. Create the first rule for this promotion:

a Add a new record to the Rules list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Debit Voucher
Rule Applies To	Transactions

b Click the Rule name.

c Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Debit Voucher Transaction
Type of Comparison	Compare to Values
Object	Transaction
Attribute	Transaction Sub Type
Condition	Does Not Equal
Value	Cancellation

d Click the Actions view tab.

e Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Update Voucher Status
Type	Invoke Custom Transaction
Value	DebitVoucher

6 Create the second rule for this promotion:

a In the threadbar, click Promotion:Admin - Voucher

b Add a new record to the Rules list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Cancel Redeemed Voucher
Rule Applies To	Transactions

c. Click the Rule name.

d. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Cancel Voucher Transaction
Type of Comparison	Compare to Values
Object	Transaction
Attribute	Transaction Sub Type
Condition	Equals
Value	Cancellation

e. Click the Actions view tab.

f. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Cancel Redeemed Voucher
Type	Invoke Custom Transaction
Value	CancelRedeemedVoucher

To activate the base promotions

1. Navigate to the Loyalty Promotions Administration screen.
2. Select the promotions with the following names:
   - Admin - Loan
   - Admin - Accruals
   - Admin - Gift
   - Admin - Redemptions
   - Admin - Cancellation
   - Admin - Voucher
3. Click Activate.

Example of Creating Tier Promotions

A tier promotion changes a member’s tier. There can only be one tier promotion for each tier. A tier Promotion record is automatically created when the Tier record is created.

For more information about creating tiers, see “Defining Tier Classes and Tiers” on page 37.

You must create tier promotions when you set up a loyalty program with tiers. Tier promotions place members in the appropriate tier, based on attributes or on the number of points they have.

This example assumes that you have already set up a loyalty program with the following tiers:

- Base tier
- Silver tier
- Gold Tier
- Platinum Tier

When you created these tiers, the application automatically created the tier promotion record for them.

This example will show you how to create the rules for these promotions, which move members to the appropriate tier. It shows one possible use of tier promotions. Your use of these promotions may differ, depending on your business model.

About Qualifying for Tiers

Members can qualify for a tier based upon points or attributes. This airline example uses two qualification criteria:

- **Points.** The example uses one point type.
- **Attribute.** The example uses one attribute, which is the number of flights.

You can add more qualification criteria by using additional point types and attributes.

To qualify for a tier, the member must take a specified number of flights during the current qualifying period. The example uses a member attribute named *# of Tier Flights* to track this value, and it uses an action to reset this attribute to zero at the appropriate time. The appropriate time depends on which of two possible values you select in the Restart Qual Period field:

- **Tier Status Change.** Every time a member reaches a new tier, the member’s qualifying points and tier attributes are reset to 0. For example, if the loyalty program's requirements are 25,000 points for Tier 1 and 50,000 points for Tier 2, then after the member earns 25,000 points to reach Tier 1, the member has to earn additional 50,000 points to reach Tier 2 (for a total of 75,000 points). When the member's qualifying period expires, the member either remains in his current tier or is demoted, based upon the number of qualifying points earned by the qualifying period's expiration date, but in either case his points are also reset.

- **Qual Period Expiration.** A member's qualifying points and tier attributes are reset only when the member's qualifying period expires. Thus, if the loyalty program's requirements are 25,000 points for Tier 1 and 50,000 points for Tier 2, then after the member has earned 25,000 points to reach Tier 1, the member's points are not reset. The member only needs to earn an additional 25,000 points to have the total of 50,000 points needed to reach Tier 2. When the member's qualifying period expires, the member either remains in his current tier or is demoted, based upon the number of qualifying points earned by the qualifying period's expiration date, but in either case, this is the one time when the member's points and tier attribute are reset.

In the example given here, the value in the Restart Qual Period field is Tier Status change, so the example includes an action to reset tier attributes to zero when the tier changes. Points are automatically reset to zero, because you selected this option, but you must create the rule to reset the tier attributes to zero.

To create a tier promotion, perform the following tasks:

1. "Creating a Counter for Tier Flights" on page 56
2. "Creating the Base Tier Promotion Rules" on page 59
3. "Creating the Silver Tier Promotion Rules" on page 65
4. "Creating the Gold Tier Promotion Rules" on page 76
5. "Creating the Platinum Tier Promotion Rules" on page 81

Creating a Counter for Tier Flights

Because members can qualify for tiers based on the number of flights they take, you must create a counter that keeps track of these flights. You do this by:

1. "Creating an Attribute That Counts the Number of Tier Flights" on page 56
2. "Creating a Promotion to Update the Number of Tier Flights" on page 57
3. "Activating the Promotion" on page 59

Creating an Attribute That Counts the Number of Tier Flights

First, you create an attribute that will be used to count the number of tier flights.

To create an attribute that counts the number of tier flights

1. Navigate to the Program Level Attributes view of the Loyalty Program Administration screen.
2. In the link bar of the Program Level Attributes form, click Member Attributes.
3. Add a new Program Level Attributes record and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Name	# of Tier Flights
Data Type	Integer

Field	Value
Active	Yes
Default Value	0
Display to User	Yes

Creating a Promotion to Update the Number of Tier Flights

Next, you must promotion that includes a rule that increments the # of Tier Flights attribute whenever the user takes a flight.

To create a promotion that updates the # of Tier Flights attribute

1. Navigate to the Promotions screen.
2. Add a new Promotion record and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Name	Admin - Update # of Tier Flights Attribute
Active	Yes
Always Apply	Yes
Apply To	Accrual-Product
Product Inclusion	Include Products

NOTE: You selected Include Products in the Product Inclusion field, because this will only apply to airline flights. Now you must select that product in the Products view.

3. Click the Products view tab.
4. Add a new Product record and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Name	Airline Flight

NOTE: Next you create the rule that updates the attribute if the criteria are met.

5. Click the Rules view tab.

6 In the Rules list, add a new record and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Name	Update # of Tier Flights Attribute
Apply To	Transactions

7 Click the rule name.

8 In the Criteria list of the Promotion Rule Details view, add a new record and complete the necessary fields shown in the following table.

NOTE: You have already specified that the product must be an airline flight. Now you only have to specify which carriers the member must use.

Field	Value
Sequence	1
Name	If Indigo or CA Air flight
Type of Comparison	Compare to Values

9 In the Compare to Values Detail applet, click New and complete the necessary fields shown in the following table.

Field	Value
Object	Transaction
Attribute	Partner
Condition	Equals

10 In the Values applet below the Compare to Values Detail applet, add two new records and enter the names of the carriers, as shown in the following table.

Field	Value
Value	CA Airline
Value	Indigo Airways

11 In the link bar, click Actions.

12 Add a new Action record and complete the necessary fields in the Action list and Detail form, shown in the following table.

Field	Value
Sequence	1
Name	Update # of Tier Flights Attribute
Action	Add
Value	1

Activating the Promotion

Now that you have set up this promotion, you can activate it.

To activate the promotion

- In the Promotion form, click the Activate button.

  The promotion will be active during the period between the start date and the end date.

Creating the Base Tier Promotion Rules

This procedure assumes that you have already created the tiers, including one named Base Tier, in which members are automatically placed when they join the program. When you created this tier, the application automatically created a tier promotion for it. Now, you must create the following rules for this promotion:

- Upgrade to Platinum
- Upgrade to Gold
- Upgrade to Silver
- Qualify for Base

A member can be promoted to any tier) based on earning enough qualifying points or taking enough flights (as measured by the # of Tier Flights attribute). A separate rule is required to evaluate each of these.

Within the same set of Apply To values (such as Apply To = Tiers), only one rule can apply, and the rule with the lowest sequence number is evaluated first. If the member meets the criteria for this rule, then that rule's action is invoked and no more rules are evaluated. Thus, for each tier, the rules to upgrade to Platinum must come first, then the rules to upgrade to Gold, and so on.

Creating the Upgrade to Platinum Rules for the Base Tier

The first rule for the Base tier evaluates whether a member has earned enough points to reach the Platinum tier.

The second rule evaluates whether the member has taken enough flights to reach the Platinum tier. The member must take 60 or more flights.

It is unlikely that a member would go directly from Base to Platinum by earning points, but the rules must cover every possible situation.

Because this Restart Qual Period Rule for this program is Tier Status change, you must also create a rule to reset tier attributes to zero when the tier changes.

To create a rule upgrading from the Base tier to Platinum based on points and resetting the tier attribute to zero

1. In the Rules list, add a new record and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Sequence	1
Name	250K Points > Upgrade to Platinum
Apply To	Tiers

2. Click the rule name.
3. In the Criteria list of the Promotion Rule Details view, add a new record and complete the necessary fields shown in the following table.

Field	Value
Sequence	1
Name	250K points or more
Type of Comparison	Compare to Values

4. In the Compare to Values Detail applet, click New and complete the necessary fields shown in the following table.

Field	Value
Object	Member Tier
Attribute	Regular Points
Condition	Is Greater Than

5. In the Values applet below the Compare to Values Detail applet, add a new record and enter the value for comparison.

Field	Value
Value	249999

6. In the link bar, click Actions.

7 Add a new Action record and complete the necessary fields in the Action list and Detail form, shown in the following table.

Field	Value
Sequence	1
Name	Upgrade to Platinum
Type	Upgrade Tier
New Tier	Platinum

8 Add a new Action record and complete the necessary fields in the Action list and Detail form, shown in the following table.

Field	Value
Sequence	2
Name	Reset # of Tier Flights Attribute
Type	Update Attribute
Object	Member
Attribute	# of Tier Flights
Action	Set
Value	0

To create a rule upgrading from the Base tier to Platinum based on flights and resetting the tier attribute to zero

1 In the Rules list, add a new record and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Sequence	2
Name	60 Flights > Upgrade to Platinum
Apply To	Tiers

2 Click the rule name.

3 In the Criteria list of the Promotion Rule Details view, add a new record and complete the necessary fields shown in the following table.

Field	Value
Sequence	1
Name	60 or more flights
Type of Comparison	Compare to Values

4 In the Compare to Values Detail applet, click New and complete the necessary fields shown in the following table.

Field	Value
Object	Member
Attribute	# of Tier Flights
Condition	Is Greater Than

5 In the Values applet below the Compare to Values Detail applet, add a new record and enter the comparison value, as shown in the following table.

Field	Value
Value	59

6 In the link bar, click Actions.

7 Add a new Action record and complete the necessary fields in the Action list and Detail form, shown in the following table.

Field	Value
Sequence	1
Name	Upgrade to Platinum
Type	Upgrade Tier
New Tier	Platinum

8 Add a new Action record and complete the necessary fields in the Action list and Detail form, shown in the following table.

Field	Value
Sequence	2
Name	Reset # of Tier Flights Attribute

Field	Value
Type	Update Attribute
Object	Member
Attribute	# of Tier Flights
Action	Set
Value	0

Creating the Upgrade to Gold Rule and Upgrade to Silver Rule for the Base Tier

The rules to upgrade from the Base tier to the Gold and Silver tiers are identical to the rules for upgrading to the Platinum tier, except that lower numbers of points and flights are required to qualify for these lower tiers.

Creating the Qualify for Base Rule for the Base Tier

If a member's tier qualification period expires and the member has not qualified for any other higher tiers, the member needs to be requalifying for the Base tier. This resets the number of qualifying points and the # of Tier Flights attribute to zero and restarts the member's tier qualification period.

To create a rule upgrading from the Base tier to Platinum based on flights and resetting the tier attribute to zero

1 In the Rules list, add a new record and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Sequence	7
Name	Base Expired > Qualify Base
Apply To	Tiers

2 Click the rule name.

3 In the Criteria list of the Promotion Rule Details view, add a new record and complete the necessary fields shown in the following table.

Field	Value
Sequence	1
Name	Base Expired
Type of Comparison	Compare to Values

4 In the Compare to Values Detail applet, click New and complete the necessary fields shown in the following table.

Field	Value
Object	Member Tier
Attribute	Is Expired
Condition	Equals

5 In the Values applet below the Compare to Values Detail applet, add a new record and enter the comparison value, as shown in the following table.

Field	Value
Value	Y

6 In the link bar, click Actions.

7 Add a new Action record and complete the necessary fields in the Action list and Detail form, shown in the following table.

Field	Value
Sequence	1
Name	Qualify Base
Type	Qualify Tier
New Tier	<Not required>

8 Add a new Action record and complete the necessary fields in the Action list and Detail form, shown in the following table.

Field	Value
Sequence	2
Name	Reset # of Tier Flights Attribute
Type	Update Attribute
Object	Member
Attribute	# of Tier Flights
Action	Set
Value	0

Creating the Silver Tier Promotion Rules

Because there are requirements to be part of the Silver tier, while every member automatically qualifies for the Base tier, the Silver tier's promotion rules are more complex than the Base tier's.

The Silver tier requires the following types of rules:

- Upgrade to Platinum
- Upgrade to Gold
- Qualify for Silver
- Restart the Silver Tier
- Downgrade to Base tier

Creating the Upgrade to Platinum Rules for the Silver Tier

The first rule for the Silver tier evaluates whether a member has earned enough points to reach the Platinum tier, like the rule for upgrading to Platinum from Base tier. However, this rule must also include a second criteria to make sure that the member's current tier qualification period has not expired. This is because if the tier qualification period for a Silver tier member has already expired without the member having been promoted to a higher tier such as Platinum or Gold, then a different set of rules would be invoked that would either make the member part of the Silver tier again or downgrade the member, depending upon the number of points and flights that the member had earned.

The second rule evaluates whether the member has taken enough flights to reach the Platinum tier. The member must take 60 or more flights.

Because this Restart Qual Period Rule for this program is Tier Status change, you must also create a rule to reset tier attributes to zero when the tier changes.

To create a rule upgrading from the Silver tier to Platinum based on points and resetting the tier attribute to zero

1. In the Rules list, add a new record and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Sequence	1
Name	250K Points and Not Expired > Upgrade to Platinum
Apply To	Tiers

2. Click the rule name.

3 In the Criteria list of the Promotion Rule Details view, add a new record and complete the necessary fields shown in the following table.

Field	Value
Sequence	1
Name	250K or More
Type of Comparison	Compare to Values

4 In the Compare to Values Detail applet, click New and complete the necessary fields shown in the following table.

Field	Value
Object	Member Tier
Attribute	Regular Points
Condition	Is Greater Than

5 In the Values applet below the Compare to Values Detail applet, add a new record and enter the value for comparison.

Field	Value
Value	249999

6 In the Criteria list of the Promotion Rule Details view, add a new record and complete the necessary fields shown in the following table.

Field	Value
Sequence	2
Name	Is Not Expired
Type of Comparison	Compare to Values

7 In the Compare to Values Detail applet, click New and complete the necessary fields shown in the following table.

Field	Value
Object	Member Tier
Attribute	Is Expired
Condition	Equals

8 In the Values applet below the Compare to Values Detail applet, add a new record and enter the value for comparison.

Field	Value
Value	N

9 In the link bar, click Actions.

10 Add a new Action record and complete the necessary fields in the Action list and Detail form, shown in the following table.

Field	Value
Sequence	1
Name	Upgrade to Platinum
Type	Upgrade Tier
New Tier	Platinum

11 Add a new Action record and complete the necessary fields in the Action list and Detail form, shown in the following table.

Field	Value
Sequence	2
Name	Reset # of Tier Flights Attribute
Type	Update Attribute
Object	Member
Attribute	# of Tier Flights
Action	Set
Value	0

NOTE: To create a rule upgrading from the Silver tier to Platinum based on flights and resetting the tier attribute to zero, use the same method that you used to create the rule to upgrade to Platinum based on points, but create a criteria that checks the value in the # of Flights attribute instead of a criteria that checks the number of points.

Creating the Upgrade to Gold Rule for the Silver Tier

The rules to upgrade from the Silver tier to the Gold tier are identical to the rules for upgrading to the Platinum tier, except that lower numbers of points and flights are required to qualify for the Gold tier.

Note that when you create a criteria for the number of points required, you only have to use the comparison Is Greater Than. Because rules are applied in sequence and only one rule will be applied, the member did not have enough points to satisfy the rule for qualifying for Platinum if the engine reached this rule. Therefore the rule only has to check whether the member has enough points to qualify for Gold, not whether the member has less points than what is needed for Platinum.

Creating the Qualify for Silver Rule for the Silver Tier

The member may already be in the Silver tier and may only have enough points or flights to qualify for Silver. Then the member is still Silver, rather than being downgraded. A new Silver tier record will be created for the member.

This is tracked by changing the member's tier qualification period from Requal Period (meaning that the member is trying to requalify for the current tier) to Qual Period (meaning that the member has already requalified for the current tier and now is trying to qualify for the next highest tier). This is what the Qualify Tier action will do in this situation.

Note that the member's # of Tier Flights attribute is not reset to zero. This is because the member has now requalified for Silver and is still in the midst of trying to qualify for Gold, so the attribute must keep incrementing. If the member does not reach Gold and his tier qualification period expires, that is when the # of Tier Flights attribute will be reset to zero.

Again, separate rules are used to evaluate the member for number of qualifying points and number of tier flights.

The rule to requalify for Silver has three criteria:

- Whether the member has earned enough points.
- Whether the member is in a Requalify Period (rather than a Qualify Period). Being in a Requalify Period means the member is still trying to requalify for Silver.
- That the member's tier qualification period has not expired.

If these criteria are met, then the actions are to Qualify the member for the Silver tier, which automatically changes the member from being in a Requalify Period to being in a Qualify Period.

To create a rule requalifying for Silver from the Silver tier based on flights

1. In the Rules list, add a new record and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Sequence	5
Name	60K Points and Not Expired > Qualify Tier
Apply To	Tiers

2. Click the rule name.

3. In the Criteria list of the Promotion Rule Details view, add a new record and complete the necessary fields shown in the following table.

Field	Value
Sequence	1
Name	Greater than 60K
Type of Comparison	Compare to Values

4. In the Compare to Values Detail applet, click New and complete the necessary fields shown in the following table.

Field	Value
Object	Member Tier
Attribute	Regular Points
Condition	Is Greater Than

5. In the Values applet below the Compare to Values Detail applet, add a new record and enter the comparison value, as shown in the following table.

Field	Value
Value	59999

6. In the Criteria list of the Promotion Rule Details view, add a new record and complete the necessary fields shown in the following table.

Field	Value
Sequence	2
Name	In Requalify Period (Not in Qual Period)
Type of Comparison	Compare to Values

7. In the Compare to Values Detail applet, click New and complete the necessary fields shown in the following table.

Field	Value
Object	Member Tier
Attribute	In Qualifying Period
Condition	Equals

8 In the Values applet below the Compare to Values Detail applet, add a new record and enter the comparison value, as shown in the following table.

Field	Value
Value	N

9 In the Criteria list of the Promotion Rule Details view, add a new record and complete the necessary fields shown in the following table.

Field	Value
Sequence	3
Name	Is Not Expired
Type of Comparison	Compare to Values

10 In the Compare to Values Detail applet, click New and complete the necessary fields shown in the following table.

Field	Value
Object	Member Tier
Attribute	Is Expired
Condition	Equals

11 In the Values applet below the Compare to Values Detail applet, add a new record and enter the comparison value, as shown in the following table.

Field	Value
Value	N

12 In the link bar, click Actions.

13 Add a new Action record and complete the necessary fields in the Action list and Detail form, shown in the following table.

Field	Value
Sequence	1
Name	Qualify Tier
Type	Qualify Tier

NOTE: To create a rule requalifying for the Silver tier based on flights, use the same method that you used to create the rule to requalify for Silver based on points. However, you need to create a criteria that checks the value in the # of Flights attribute instead of a criteria that checks the number of points.

Creating the Restart Silver Rule

This rule applies if:

- The member is part of the Silver tier.
- The member has earned enough points to remain part of the Silver tier but not enough to reach the Gold tier.
- The member’s tier qualification period expires.

In this case, the member is made part of the Silver tier again, the tier qualification period restarts, and the qualifying points and tier attribute are reset to zero.

This rule has two criteria:

- The member is in the Qualifying Period (not Requalifying Period). Being in the Qualifying Period means that the member has already earned enough to requalify for the current tier, Silver.
- The member's tier qualification period has expired.

If both these criteria are satisfied, the rule performs two actions:

- Restart the member in the same tier (Requalify Tier action). Restarting the member adds a new tier record, recalculates the new tier's qualification period start and end dates, and sets the qualifying point balance to zero.
- Set the value of the # of Tier Flights attribute to zero.

To create a rule restarting the Silver tier

1 In the Rules list, add a new record and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Sequence	7

Field	Value
Name	Restart Tier
Apply To	Tiers

2 Click the rule name.

3 In the Criteria list of the Promotion Rule Details view, add a new record and complete the necessary fields shown in the following table.

Field	Value
Sequence	1
Name	In Qualifying Period
Type of Comparison	Compare to Values

4 In the Compare to Values Detail applet, click New and complete the necessary fields shown in the following table.

Field	Value
Object	Member Tier
Attribute	In Qualifying Period
Condition	Equals

5 In the Values applet below the Compare to Values Detail applet, add a new record and enter the comparison value, as shown in the following table.

Field	Value
Value	Y

6 In the Criteria list of the Promotion Rule Details view, add a new record and complete the necessary fields shown in the following table.

Field	Value
Sequence	2
Name	Tier Expired
Type of Comparison	Compare to Values

7 In the Compare to Values Detail applet, click New and complete the necessary fields shown in the following table.

Field	Value
Object	Member Tier
Attribute	Is Expired
Condition	Equals

8 In the Values applet below the Compare to Values Detail applet, add a new record and enter the comparison value, as shown in the following table.

Field	Value
Value	Y

9 In the link bar, click Actions.

10 Add a new Action record and complete the necessary fields in the Action list and Detail form, shown in the following table.

Field	Value
Sequence	1
Name	Requalify Silver Tier
Type	Requalify Tier

11 Add a new Action record and complete the necessary fields in the Action list and Detail form, shown in the following table.

Field	Value
Sequence	2
Name	Reset # of Tier Flights Attribute
Type	Update Attribute
Object	Member
Attribute	# of Tier Flights
Action	Set
Value	0

Creating the Downgrade to Base from Silver Rule

If a Silver member's tier qualification period ends and the member has not earned enough points to remain Silver, then the member is downgraded to the one tier that is lower, Base.

This rule has two criteria:

- The member is in the Requalifying Period (not Qualifying Period), which means the member has not earned enough points to remain Silver.
- The member's tier qualification period has ended.

If both these criteria are satisfied, the rule performs two actions:

- Downgrades the member to the Base tier.
- Sets the value of the # of Tier Flights attribute to zero.

To create a rule downgrading the member from the Silver to the Base tier

1. In the Rules list, add a new record and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Sequence	8
Name	Downgrade to Base
Apply To	Tiers

2. Click the rule name.
3. In the Criteria list of the Promotion Rule Details view, add a new record and complete the necessary fields shown in the following table.

Field	Value
Sequence	1
Name	In Requalify Period
Type of Comparison	Compare to Values

4. In the Compare to Values Detail applet, click New and complete the necessary fields shown in the following table.

Field	Value
Object	Member Tier
Attribute	In Qualifying Period
Condition	Equals

5 In the Values applet below the Compare to Values Detail applet, add a new record and enter the comparison value, as shown in the following table.

Field	Value
Value	N

6 In the Criteria list of the Promotion Rule Details view, add a new record and complete the necessary fields shown in the following table.

Field	Value
Sequence	2
Name	Is Expired
Type of Comparison	Compare to Values

7 In the Compare to Values Detail applet, click New and complete the necessary fields shown in the following table.

Field	Value
Object	Member Tier
Attribute	Is Expired
Condition	Equals

8 In the Values applet below the Compare to Values Detail applet, add a new record and enter the comparison value, as shown in the following table.

Field	Value
Value	Y

9 In the link bar, click Actions.

10 Add a new Action record and complete the necessary fields in the Action list and Detail form, shown in the following table.

Field	Value
Sequence	1
Name	Downgrade to Base
Type	Downgrade Tier
New Tier	Base

11 Add a new Action record and complete the necessary fields in the Action list and Detail form, shown in the following table.

Field	Value
Sequence	2
Name	Reset # of Tier Flights Attribute
Type	Update Attribute
Object	Member
Attribute	# of Tier Flights
Action	Set
Value	0

Creating the Gold Tier Promotion Rules

Most of the Gold tier's promotion rules would function the same way as the rules for the Silver tier. The criteria and actions would all be the same, except different point and # of Tier Flights totals would be used.

The major difference between the Gold and Silver tiers is that whenever a member is downgraded from the Silver tier, there is only one tier to which he can go - Base. So, in the Downgrade rule, the tier to which the member was demoted was specified as Base. For the Gold tier, the member could be demoted to either the Silver or the Base tier, depending on the number of point earned.

Thus, the downgrade rules are more complex and will be explained in this example. The rules that are essentially the same as for the Silver tier will not be detailed in this example.

For each tier lower than the current tier (except for the Base tier), you must enter a set of two rules (one looking at qualifying points and the other looking at the member tier attribute # of Tier Flights). Thus, for Gold, you must enter a set of two rules for the Silver tier.

You must enter only one rule to downgrade to the Base tier.

Creating the Downgrade to Silver from Gold Rules

If the member has enough points or flights to qualify for Silver, the following rules apply.

To create a rule downgrading the member from Gold to Silver based on points

1 In the Rules list, add a new record and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Sequence	6
Name	60K & in Requal & Expired > Down to Silver
Apply To	Tiers

2 Click the rule name.

3 In the Criteria list of the Promotion Rule Details view, add a new record and complete the necessary fields shown in the following table.

Field	Value
Sequence	1
Name	60K or More Points
Type of Comparison	Compare to Values

4 In the Compare to Values Detail applet, click New and complete the necessary fields shown in the following table.

Field	Value
Object	Member Tier
Attribute	Regular Points
Condition	Is Greater Than

5 In the Values applet below the Compare to Values Detail applet, add a new record and enter the comparison value, as shown in the following table.

Field	Value
Value	59999

6 In the Criteria list of the Promotion Rule Details view, add a new record and complete the necessary fields shown in the following table.

Field	Value
Sequence	2
Name	In Requalify Period (Not in Qualify Period)
Type of Comparison	Compare to Values

7 In the Compare to Values Detail applet, click New and complete the necessary fields shown in the following table.

Field	Value
Object	Member Tier
Attribute	In Qualifying Period
Condition	Equals

8 In the Values applet below the Compare to Values Detail applet, add a new record and enter the comparison value, as shown in the following table.

Field	Value
Value	N

9 In the Criteria list of the Promotion Rule Details view, add a new record and complete the necessary fields shown in the following table.

Field	Value
Sequence	3
Name	Is Expired
Type of Comparison	Compare to Values

10 In the Compare to Values Detail applet, click New and complete the necessary fields shown in the following table.

Field	Value
Object	Member Tier
Attribute	Is Expired
Condition	Equals

11 In the Values applet below the Compare to Values Detail applet, add a new record and enter the comparison value, as shown in the following table.

Field	Value
Value	Y

12 In the link bar, click Actions.

13 Add a new Action record and complete the necessary fields in the Action list and Detail form, shown in the following table.

Field	Value
Sequence	1
Name	Downgrade to Silver
Type	Downgrade Tier
New Tier	Silver

14 Add a new Action record and complete the necessary fields in the Action list and Detail form, shown in the following table.

Field	Value
Sequence	2
Name	Reset # of Tier Flights Attribute
Type	Update Attribute
Object	Member
Attribute	# of Tier Flights
Action	Set
Value	0

NOTE: To create a rule downgrading from the Gold tier to Silver based on flights and resetting the tier attribute to zero, use the same method that you used to create the rule to downgrade to Silver based on points, but create a criteria that checks the value in the # of Flights attribute instead of a criteria that checks the number of points.

Creating the Downgrade to Base from Gold Rule

If the member does not have enough points or flights to qualify for Silver, this rules downgrades the member to the Base tier.

This rule has two criteria:

- The member is in the Requalifying Period.
- The member's tier qualification period has expired.

There are no qualifying point or member tier attribute requirements. If the member had met any of the higher tier's qualifying point or tier attribute requirements, this rule would not have been reached. Because everyone can be a member of the Base tier, there are no qualifying point or member tier attribute requirements.

To create a rule downgrading the member from the Gold to the Base tier based on number of flights

1 In the Rules list, add a new record and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Sequence	7
Name	In Requal or Expired > Downgrade to Base
Apply To	Tiers

2. Click the rule name.
3. In the Criteria list of the Promotion Rule Details view, add a new record and complete the necessary fields shown in the following table.

Field	Value
Sequence	1
Name	In Requalifying Period (Not in Qual Period)
Type of Comparison	Compare to Values

4. In the Compare to Values Detail applet, click New and complete the necessary fields shown in the following table.

Field	Value
Object	Member Tier
Attribute	In Qualifying Period
Condition	Equals

5. In the Values applet below the Compare to Values Detail applet, add a new record and enter the comparison value, as shown in the following table.

Field	Value
Value	N

6. In the Criteria list of the Promotion Rule Details view, add a new record and complete the necessary fields shown in the following table.

Field	Value
Sequence	2
Name	Is Expired
Type of Comparison	Compare to Values

7. In the Compare to Values Detail applet, click New and complete the necessary fields shown in the following table.

Field	Value
Object	Member Tier
Attribute	Is Expired
Condition	Equals

8 In the Values applet below the Compare to Values Detail applet, add a new record and enter the comparison value, as shown in the following table.

Field	Value
Value	Y

9 In the link bar, click Actions.

10 Add a new Action record and complete the necessary fields in the Action list and Detail form, shown in the following table.

Field	Value
Sequence	1
Name	Downgrade to Base
Type	Downgrade Tier
New Tier	Base

11 Add a new Action record and complete the necessary fields in the Action list and Detail form, shown in the following table.

Field	Value
Sequence	2
Name	Reset # of Tier Flights Attribute
Type	Update Attribute
Object	Member
Attribute	# of Tier Flights
Action	Set
Value	0

Creating the Platinum Tier Promotion Rules

The highest tier, Platinum, functions the same way as the Gold tier, except that:

- Higher numbers of qualifying point and numbers of tier flight totals are needed to qualify for Platinum than for Gold.
- There are no upgrade rules, because Platinum is the highest tier.
- There are two extra downgrade rules, for a total of five (two for downgrading to Gold, two for downgrading to Silver, and one for downgrading to Base).

5 Setting Up Siebel Loyalty Promotions

This chapter discusses how to set up loyalty promotions. It includes the following sections:

Types of Loyalty Promotions

There are three basic types of loyalty promotions:

- **Base Promotions.** Base promotions must be defined when you create a loyalty program, in order to perform basic processing, such as accruing and redeeming points. These promotions are only identified by their names, and they should not be exposed to members. Because you must create base promotions whenever you create a loyalty program, they are covered in the chapter about setting up programs, in "Creating Base Loyalty Promotions" on page 45.
- **Reward Promotions.** A reward promotion gives members opportunities to earn points that they can exchange for products or services. For example, the promotion might allow them to earn extra frequent flyer miles. For an overview of how to create reward promotions, see "About Creating Loyalty Reward Promotions" on page 84.
- **Tier Promotions.** A tier promotion gives members an opportunity to change their tier. For example, the promotion might make it easier to qualify as a Gold member or a Platinum member. For an overview of how to create tier promotions, see "About Creating Loyalty Tier Promotions" on page 85.

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 BOS in August 2003, they will earn 1000 bonus points if they are a Platinum member or 500 bonus points if they are 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 BOS in August 2003 3 times, they will earn 3000 bonus points, if they fly 4 or 5 times, they will earn 4000 bonus points, or if they fly more than 5 times, they will earn 5000 bonus points.

- **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, they will get 5000 bonus points.
- **Action-Based Promotions.** These promotions reward members for some action other than a purchase. For example, if they update their member profile, they will get 500 bonus points, or if they register with your reward program, they will get 2000 bonus points. Either of these examples would only be given to a member once.

All of these types of promotions can all be created using the same framework of rules, criteria, and actions. For examples of how to create several types of promotions, see "Loyalty Promotion Examples" on page 102.

About Creating Loyalty Reward Promotions

To create a reward promotion, you use at least five types of records:

- **Promotion.** The Promotion record includes general information about the promotion, such as its name, the dates when it is active, and whether it requires member enrollment.
- **Rule.** A promotion is made up of one or more rules. The rule record includes general information about each rule, such as its name and the sequence in which it fires.
- **Criteria.** Each rule includes one or more criteria. A transaction must meet all of these criteria for the rule to fire.
- **Attribute.** An attribute is usually a field of a record. Criteria compare an attribute to a value or to another attribute. You must define the attribute before you can define the criteria.
- **Action.** Each rule includes one or more actions. These actions are executed when the rule fires.

For example, you can create a promotion that gives a 100 point bonus to any member who makes a purchase of more than $1,000 during the month of August.

- The Attribute record would specify the field of the Transaction record that contains the total amount of the purchase. You could name this attribute Amount of Purchase.
- The Promotion record would include a name, such as August Bonus Promotion, and would make the promotion active during August.
- There would be one Rule record under the Promotion record. It would have a name such as Purchase During August.
- There would be one Criteria record under the Rule record. It would test whether the attribute Amount of Purchase is greater than the value $1,000.
- There would be one Action record under the Rule record. It would give the member 100 points.

This is a simple example, but promotions can also include multiple rules, criteria, and actions.

In addition to the four records already described, promotions may optionally include the following records:

- **Products.** When you create the Promotion record, you can specify that the promotion only applies to purchases of specific products or applies to all except specific products. If you do this, you must use the Products view of the Promotion screen to specify which products are included in or excluded from the promotion.
- **Point Blocks.** When you create the Promotion Record, you can limit the number of points that can be distributed through the promotion, by specifying that the promotion can only use point blocks that you create specifically for it. Then you must use the Point Blocks view of the Promotion screen to create the point blocks that the promotion uses. If you do not do this, the promotion uses any appropriate point blocks of its program.
- **Tier.** You can specify that the promotion applies only to certain tiers by adding these tiers in the Tiers view. For example, if you only add the Platinum tier in this view, the promotion will only give rewards to Platinum members, and only Platinum members will be able to see this promotion in eLoyalty.

For step-by-step examples of how to create rules for different types of loyalty promotions, see "Loyalty Promotion Examples" on page 102.

About Creating Loyalty Tier Promotions

A tier promotion defines the rules that are applied to determine whether someone in that tier is changed to another level based on the member's attributes. For example, it can upgrade, downgrade, or requalify a member based on the member's behavior.

A tier promotion applies to every member in the tier. Only one tier promotion can be considered for a given tier, unlike loyalty promotions where multiple promotions are considered for each transaction.

The high-level process of creating a tier promotion is:

- **Promotion record created automatically.** When you create a tier record in the Loyalty Program Administration screen, a tier promotion is automatically created for that tier and given a name with the following form: *Tier Promotion: <name of tier>*.
- **Create the rule for the promotion.** In the Loyalty Promotions Administration screen, you create the rules for the promotion. Create the Rule, Criteria, Attribute, and Action records as needed to change the tier level of members in this tier based on their behavior. For an overview of how to use these records to create rules, see "About Creating Loyalty Reward Promotions" on page 84.
- **Specify products.** Optionally, you can use the Product Inclusion field of the Promotion record and the Products view of the Loyalty Promotion Administration screen to specify that the promotion only applies to purchases of specific products or applies to all except specific products.
- **Do not use the Point Blocks or Tier views.** The Point Blocks view of the Loyalty Promotions Administration screen specifies which point blocks reward points come from, and this does not apply to tier promotions, because they do not give points as rewards. The Tier view specifies which tiers the promotion applies to, and this information does not apply to tier promotions, because the tier was already specified when the promotion was created.

For a step-by-step example of how to create a tier promotion, see "Example of Creating Tier Promotions" on page 55.

Process of Creating Loyalty Promotions

This process can be used for creating either reward promotions or tier promotions.

For an overview of how to create reward promotions, see "About Creating Loyalty Reward Promotions" on page 84.

For an overview of how to create tier promotions, see "About Creating Loyalty Tier Promotions" on page 85.

Before you create a promotion, you must create a program that the promotion is part of. For more information, see Chapter 4, "Setting Up Siebel Loyalty Programs."

To create loyalty promotions, perform the following tasks:

1. "Creating Attributes for Loyalty Promotions" on page 86
2. "Creating a Loyalty Promotion Record" on page 89
3. "Specifying Products Included in a Loyalty Promotion" on page 91
4. "Providing Point Blocks for Loyalty Promotions" on page 91
5. "Creating Rules for Loyalty Promotions" on page 93
6. "Creating Criteria for Loyalty Promotion Rules" on page 93
7. "Creating Actions for Loyalty Promotion Rules" on page 97
8. "Specifying the Tiers Applicable to Loyalty Promotions" on page 100
9. "Activating Loyalty Promotions" on page 101

Creating Attributes for Loyalty 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 criteria saying that this attribute equals Platinum.

All the types of attributes are summarized in Table 8.

Table 8. Types of Attributes

Attribute Type	Description	Read-Only?	Promotion Type Used By
Member Attributes	Name - Value pairs maintained for each member. These instances are created only when the attribute has to be updated for a member first time.	No	All
Member Field Attributes	Fields of the Member record.	Editable if the field is editable.	All
Member Tier Attributes	Fields of the Tier record for the member's tier.	Editable if the field is editable.	Tier
Point Totals Attributes	Calculated value equal to the points of the specified type accrued over the specified number of months.	Yes	All
Transaction Attributes	Fields of the Transaction record	Yes	Rewards/Transaction Rules
Promotion Specific Attributes	Fields of the Promotion Bucket.	Editable if the field is editable.	Rewards/Attributes
Member Tier Class	The current value of a member's tier within a tier class. This is created internally for each tier class and not exposed to the user.	Yes	All

This task is a step in "Process of Creating Loyalty Promotions" on page 86.

Creating Promotion Specific 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.

To create promotion specific attributes

1. Navigate to the Loyalty Promotions Administration screen.
2. Click the name of the Promotion that the attribute will apply to.
3. Click the Promotion Specific Attributes view tab.

4 Add a new record to the Promotion Specific Attributes list, and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Attribute Type	Select a type. Attribute types are described in Table 8 on page 87.
Active	Select this check box to make the attribute available for use in criteria and actions.
Field	Select the field that the attribute represents. For information about specifying which fields are available, see "Changing the Fields Used in Loyalty Attributes" on page 15.
Default	Enter a default value that will be used when the attribute is created for a member for the first time.
Data Type	Select the data type of the attribute. If you selected a field, its data type is displayed automatically.
Pick List	Select this check box if the attribute is a field whose values are entered using a picklist. Then, when you are defining criteria and actions, the application will display the picklist with the values for this field.
Pick Applet	Select this check box if the attribute is a field whose values are entered using a dialog box. Then, when you are defining criteria and actions, the application will display the dialog box with the values for this field.
Pick Field	The pick field is that field whose value the user sees in the UI after selecting from the pick applet.

Creating Member or Member Tier or Transaction Attributes

Member attributes represent fields in the member record.

Member tier attributes represent fields in the Tier record for the member's tier.

Transaction attributes represent fields in the Transaction record.

To create member or member tier or transaction attributes

1. Navigate to the Loyalty Programs Administration screen.
2. Click the Program Id of the Program that the attribute will apply to.
3. Click the Program Level Attributes view tab.
4. Add a new record to the Program Level Attributes list.
5. In the link bar, click Member Attributes, Tier, or Transaction.

6 Add a record to the Program Level Attributes list and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Field	Select the field that the attribute represents.
Read Only	Select this check box to make the field read only, even if it is an editable field in the record.

Creating Point Totals Attributes

Point totals attributes represent the number of points that a member has accrued over a period of time.

For example, you would use this attribute to create a promotion saying that any member who earns one thousand points in two months will get one hundred bonus points.

To create point totals attributes

1. Navigate to the Loyalty Programs Administration screen.
2. Click the Program Id of the Program that the attribute will apply to.
3. Click the Program Level Attributes view tab.
4. Add a new record to the Program Level Attributes list.
5. In the link bar, click Point Totals.
6. Add a record to the Program Level Attributes list and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Point Type	Select the point type.
Total Over # of Months	Enter the number of months that the points are totaled over.

Creating a Loyalty Promotion Record

The Promotion record includes general information about the promotion, such as its name, when it is in effect, and whether it requires enrollment.

This task is a step in "Process of Creating Loyalty Promotions" on page 86.

NOTE: This task does not apply to tier promotions, because the Promotion record is created automatically when you create the tier. For more information, see "About Creating Loyalty Tier Promotions" on page 85.

To create a loyalty promotion record

1. Navigate to the Loyalty Promotions Administration screen.
2. Add a new record to the Promotions list, and complete the necessary fields in the record and in the More Info form. Some fields are described in the following table.

Field	Comments
Apply To	For loyalty promotions, select which type of transaction the promotion applies to. The options are Accrual-Product, Loan, Redemption-Product, Cancellation, Accrual-Gift, Bonus, and Voucher. If you leave this field blank, the promotion can apply to all types of transactions. This field does not apply to tier promotions. For more information about configuring the values in this field, see "Creating Apply To Types for Loyalty Promotions" on page 16.
Active	This check box is selected if the promotion is active. You cannot select or deselect it manually. It changes when you click the Activate, Deactivate, or Modify button.
Always Apply	Select this check box to make this promotion always apply, regardless of the choice you made in the Promotion Calculation Rule for the loyalty program that this promotion is part of. For more information, see "About Promotion Calculation Rules for Loyalty Programs" on page 30.
Enrollment Required	Select this check box to require members to enroll for the promotion in order to get the reward. If it is not checked, all members of the program receive the reward for this promotion without enrolling in it.
Promotion Start and Promotion End	Enter the date when the promotion starts and ends. Products purchased between these dates qualify for the promotion reward.
Enrollment Start and Enrollment End	If this promotion requires enrollment, enter the dates when members can enroll.
Product Inclusion	Select which products the promotion applies to. The options are: All Products. Applies to all accrual products. ■ **Include Products.** Applies only to products listed in the Products view of the Loyalty Promotion Administration screen. ■ **Exclude Products.** Applies only to products not listed in the Products view of the Loyalty Promotion Administration screen.
Point Limit Type	Select Limited if the points awarded will be taken from a point block created specifically for this promotion. Select Unlimited if the points will be taken directly from the company's or partner's point blocks, without limit. For more information, see "Providing Point Blocks for Loyalty Promotions" on page 91.
Partner	If applicable, select the partner who is hosting this promotion.

Specifying Products Included in a Loyalty Promotion

You can create loyalty promotions that apply to all products or that apply only to the products you specify.

When you create the Loyalty Promotion record, you must choose one of these values in the Product Inclusion field:

- **All Products.** The promotion applies to all accrual products.
- **Include Products.** The promotion applies only to products listed in the Products view of the Promotion Administration screen.
- **Exclude Products.** The promotion applies only to products not listed in the Products view of the Promotion Administration screen.

If you select All Products, skip this procedure. If you select one of the other two options, use this procedure to list the products that are included or excluded.

This task is a step in "Process of Creating Loyalty Promotions" on page 86.

To specify products included in or excluded from a promotion

1. Navigate to the Loyalty Promotions Administration screen.
2. In the Apply To field of the Promotion record, select Include Products or Exclude Products.
3. Click the Products view tab.
4. In the Products list, add a record for each product that is included or excluded.

Providing Point Blocks for Loyalty Promotions

To provide points to members who use a promotion, you can:

- **Create point blocks specifically for a promotion.** If you want to limit the number of point blocks that a promotion can distribute, you select Limited in the Point Limit Type field of the Promotion record, so points will only be taken from point blocks created specifically for the promotion. Then you must create the point blocks for the promotion.
- **Draw points from existing point blocks of the host company or partner.** If you do not want to limit the number of point blocks that a promotion can distribute, you select Unlimited in the Point Limit Type field of the Promotion record, so points will taken from the point blocks of the host company or the partner who owns the promotion. Then you must check to make sure that there are enough points to support the promotion.

This task is a step in "Process of Creating Loyalty Promotions" on page 86. This task applies only to reward promotions. Tier promotions do not use points.

NOTE: This task does not apply to tier promotions, because they do not give points as rewards. For more information, see "About Creating Loyalty Tier Promotions" on page 85.

Creating Point Blocks for a Loyalty Promotion

If you selected Limited in the Point Limit Type field of the Promotion record, you must create point blocks for the promotion.

For more information about fields in the Point Block record, see "Minting Point Blocks for Loyalty Programs" on page 35.

NOTE: Before doing this, you must select Limited in the Point Limit Type field of the Promotion record. Otherwise, this view is read only.

To create a point block for a loyalty promotion

1. Navigate to the Loyalty Promotions Administration screen.
2. In the Promotions list, select the promotion that you want to create a point block for.
3. Click the Point Blocks view tab.
4. Add a new record to the Point Blocks list and complete the necessary fields.

Checking Point Blocks Available for a Loyalty Promotion

If you selected Unlimited in the Point Limit Type field of the Promotion record, points for the promotion are taken from the company or the partner who owns the promotion. You should check to make sure that enough points exist to support the promotion.

The promotion will use points from point blocks that have the appropriate value in the following fields:

- **Program.** Must be the same as the promotion's program.
- **Point Type.** Must be the same as the point type being assigned.
- **Status.** Must be Approved.
- **Start Date.** Must be less than or equal to today (or NULL).
- **End Date.** Must be greater than or equal to today (or NULL).
- **Partner.** Must be the same as the transaction's partner. If the transaction's partner is NULL, then must be the same as the promotion's partner.
- **Points Remaining.** Must be greater than the amount of points being assigned.

To check point blocks available for a promotion

1. Navigate to the Loyalty Program Administration screen.
2. In the Loyalty Programs list, select the program that the promotion is part of.
3. Click the Point Blocks view tab.
4. Check how many points are available in point blocks that have the appropriate values in the fields listed earlier.

5 If not enough points are available, create more points, as described in "Minting Point Blocks for Loyalty Programs" on page 35.

Creating Rules for Loyalty Promotions

This task is a step in "Process of Creating Loyalty Promotions" on page 86.

Rules for loyalty promotions have criteria and actions attached to them. The criteria determine whether the rule qualifies, and the actions specify what the rule does if it qualifies.

Siebel Loyalty uses these records as follows:

- **Rules.** Loyalty reads the rules in the order specified by the Sequence field. Until it finds a rule that qualifies, it executes that rule's actions, and it moves to the next promotion. This means that only one rule in a promotion can be executed.
- **Criteria.** Loyalty evaluates criteria as true or false. All criteria must be true for the rule to qualify. In other words, all criteria for one rule are in a logical AND relationship.
- **Actions.** If a rule qualifies, Loyalty executes all the actions for that rule.

To enter rules for a loyalty promotion

1 Navigate to the Loyalty Promotions Administration screen.

2 In the Loyalty Promotions list, click the Promotion # of the promotion that the rule is used by.

3 Click the Rules view tab.

4 Add one or more new records to the Rules list, and complete the necessary fields, described in the following table.

Field	Comments
Sequence #	Enter the sequence in which the application will evaluate the rules of the promotion.
Name	The name given to the rule.
Apply To	If this is a loyalty promotion, select either Transactions or Attributes to specify which of these the rule applies to. If this is a tier promotion, this field is read only and displays Tiers.

Creating Criteria for Loyalty Promotion Rules

The criteria of a rule are conditional statements that the application evaluates as true or false.

If you add multiple criteria, all criteria must be true for the rule to qualify.

There are the following types of criteria:

- **Compare to Values.** Compares an attribute to one or more values.

- **Compare to Object.** Compares the value of one attribute with another attribute.
- **Evaluate Roundtrip.** Checks whether a flight transaction is a part of a roundtrip.

When you select one of these in the Type field of the Criteria record, the appropriate Criteria Detail for that type appears.

NOTE: A rule does not have to have criteria. If it does not have any criteria, it will apply to all transactions that meet its other conditions, such as occurring between the start date and the end date. You can use a rule without criteria for a promotion such as: "All purchases made during January earn 1,000 bonus points." If you also select Include Products, you can use a rule without criteria for a promotion such as: "All flights from SFO to BOS during January earn 1,000 bonus points."

This task is a step in "Process of Creating Loyalty Promotions" on page 86.

Creating Criteria That Compare Attributes to Values

This type of criteria lets you compare an attribute to a value. For example, you can see if the value in a specific field is greater than 1000. If it is, the criteria evaluates to true, and the member receives the bonus that is defined in the Action list for this rule.

To create criteria that compare attributes to values

1. Navigate to the Loyalty Promotions Administration screen.
2. In the Loyalty Promotions list, click the Promotion # of the promotion that the rule is used by.
3. Click the Rules view tab.
4. Click the Name field of the Rule to display rule details.
5. Add one or more new records to the Criteria list, and complete the necessary fields of the Criteria and Criteria Detail record. Some fields are described in the following table.

Field	Comments
Sequence #	Displays the sequence in which criteria are evaluated. To optimize performance, you can change the sequence so the criteria that eliminate most records are evaluated first, leaving fewer records for the remaining criteria to read through. (The sequence does not affect whether the rule qualifies, because all criteria must be true for the rule to qualify.)
Type of Comparison	Select Compare to Values
Object	Select the Object whose attribute will be compared. The picklist displays only those objects that are appropriate to the value in the Rule Applies To field (Transactions, Attributes, Tiers). The complete list of objects includes Member, Promotion, Transaction, and Member Tier.

Field	Comments
Attribute	Select the attribute to be compared. You can only choose attributes based on the object chosen in the Object field.
Condition	Select the operator for the comparison. Depending on the data type of the attribute (Integer, Date, String, Number), the drop-down list will show comparison operators such as Equals, Does Not Equals, Is Greater Than, Is Empty, Starts With.

6. If you selected a condition that requires a value, add one or more records to the Values list, and enter the values that the attribute will be compared with.

   For example, you must add values if you choose Equals or Is Greater than as the condition. You may not add values if you choose Is Empty as the condition.

Creating Criteria That Compare Attributes to Attributes

This type of criteria lets you compare an attribute to another attribute. For example, you can see if the value in a specific field is greater than the value in another field. If it is, the criteria evaluates to true, and the member receives the bonus that is defined in the Action list for this rule.

To create criteria that compare an attribute to another attribute

1. Navigate to the Loyalty Promotions Administration screen.
2. In the Loyalty Promotions list, click the Promotion # of the promotion that the rule is used by.
3. Click the Rules view tab.
4. Click the Name field of the Rule to display rule details.
5. Add a new record to the Criteria list, and complete the necessary fields of the Criteria and Criteria Detail record. Some fields are described in the following table.

Field	Comments
Sequence #	Displays the sequence in which criteria are evaluated. To optimize performance, you can change the sequence so the criteria that eliminate most records are evaluated first, leaving fewer records for the remaining criteria to read through. (The sequence does not affect whether the rule qualifies, because all criteria must be true for the rule to qualify.)
Type of Comparison	Select Compare to Object
Object	Select the Object whose attribute will be compared.
Attribute	Select the attribute to be compared.
Other Object	Select the Object whose attribute the first attribute will be compared with.

Field	Comments
Other Attribute	Select the attribute that the first attribute will be compared with.
Operator and Value	You can compare the first attribute with a calculation based on the Other Attribute. For example, you can compare the first attribute with Other Attribute * 2. If you want to do this, select an operator (such as *) and a value (such as 2) for the calculation.

Creating Criteria that Evaluate Roundtrips

This type of criteria checks whether a flight transaction is a part of a roundtrip. If the roundtrip has been completed, the criteria evaluates to TRUE, and the member receives the bonus that is defined in the Action list for this rule.

To create this sort of promotion based on a roundtrip, you must also create a second rule that has no criteria and only invokes the Update Roundtrip Info action. This second rule updates the roundtrip information whenever there is a transaction that completes a segment of this roundtrip. This second rule must be written so it updates the object and attribute that you specify in the To Recorded Roundtrip Info Object and the To Recorded Roundtrip Info Attribute fields of the criteria for the first rule.

To create criteria that evaluate roundtrips

1. Navigate to the Loyalty Promotions Administration screen.
2. In the Loyalty Promotions list, click the Promotion # of the promotion that the rule is used by.
3. Click the Rules view tab.
4. Click the Name field of the Rule to display rule details.
5. Add a new record to the Criteria list, and complete the necessary fields of the Criteria and Criteria Detail record. Some fields are described in the following table.

Field	Comments
Sequence #	Displays the sequence in which criteria are evaluated. To optimize performance, you can change the sequence so the criteria that eliminate most records are evaluated first, leaving fewer records for the remaining criteria to read through. (The sequence does not affect whether the rule qualifies, because all criteria must be true for the rule to qualify.)
Type of Comparison	Select Evaluate Roundtrip.
Compare Transaction Roundtrip Info Object	Displays Transaction. This field is read-only, because the Evaluate Roundtrip comparison must be based on transactions.
Compare Transaction Roundtrip Info Attribute	Enter the transaction attribute that has the roundtrip information.

Field	Comments
To Recorded Roundtrip Info Object	Enter the object in which the engine should store the information about the segments of the roundtrip that have already been completed.
To Recorded Roundtrip Info Attribute	Enter the attribute on the object that stores information about completed segments information which has this information in an engine readable format.

6 Add a record to the Values list, and enter the airports that are the origin and destination of the roundtrip in the form XXX-YYY.

For example, for a roundtrip between the San Francisco and Los Angeles airports, enter *SFO-LAX*.

Creating Actions for Loyalty Promotion Rules

If a rule qualifies, the application executes all the actions for that rule.

The following actions are used in promotions:

- **Tier Change.** Changes the member’s tier.
- **Assign Points.** Gives points to the member.
- **Update Attribute.** Changes the value of an attribute.
- **Invoke Custom Action.** Invokes a method that you create to perform custom actions.
- **Update Roundtrip Info.** Updates information about the segments of a roundtrip that have been completed. This is only used when you create a criteria of the type Evaluate Roundtrip.

  NOTE: The types of actions that you are able to select depend on the context. For examples, Tier Change actions are not available when you create Reward Promotions.

In addition, the following actions are available for use in base promotions, but they are not used in promotions that are made visible to customers. For more information about base promotions, see “Creating Base Loyalty Promotions” on page 45.

- **Redeem Points.** Redeems the member’s points.
- **Cancel Transaction.** Cancels a transaction.

This task is a step in “Process of Creating Loyalty Promotions” on page 86.

To create a tier change action

1 Navigate to the Loyalty Promotions Administration screen.

2 In the Loyalty Promotions list, select the promotion that uses the rule.

3 Click the Rules view tab.

4 Click the Name field of the Rule to display view details, and in the link bar, click Actions.

5 Add a new record to the Actions list, and in the Type field, select Tier Change.

6 In the Detail form, select Upgrade Tier, Downgrade Tier, Qualify Tier, or Re-qualify Tier.

7 If you selected Upgrade Tier or Downgrade Tier, specify the tier to upgrade or downgrade to.

8 If you selected Qualify Tier or Re-qualify Tier, you do not have to specify any other values. These selections keep the user in the current tier, based on points required.

To create an assign points action

1 Navigate to the Loyalty Promotions Administration screen.

2 In the Loyalty Promotions list, select the promotion that the rule is used by.

3 Click the Rules view tab.

4 Click the Name field of the Rule to display view details, and in the link bar, click Actions.

5 Add a new record to the Actions list, and in the Type field, select Assign Points.

6 In the Detail form, complete the necessary fields, described in the following table.

Field	Comments
Use from Transaction	If you select this check box, the promotion uses the same point type and qualifying/nonqualifying value as the transaction. The Point Type and Qualifying fields become read-only. You can only select this check box for rules that apply to transactions.
Point Type	Select the point type to assign.
Qualifying	Select or deselect this check box to make the points qualifying or non-qualifying.
Object, Attribute, Operator, Value	Use these fields to build the expression that specifies how many points the member receives: ■ Use Object and Attribute to specify the attribute that the number of points is based on. For example, you can specify Transaction.Points to give a bonus equally to the number of base points. ■ Use Operator and Value with Object and Attribute to base the points on a calculation. For example, you can specify Transaction.Points * 0.2 to give a bonus equal to 20% of the base points. ■ Use Value alone to give a constant bonus. For example, you can enter 500 as the Value and leave the other three fields blank to give a bonus of 500 points.

Field	Comments
Expiration Length, Expiration UoM	Use these fields to specify when the points expire. For example, enter an Expiration Length of 2 and an Expiration UoM of Years for the points to expire in two years.
Expiration Snap To	Optionally, specify that the expiration will be the nearest month, year, and so on to the expiration date determined by Expiration Length and UoM.

To create an update attributes action

1. Navigate to the Loyalty Promotions Administration screen.
2. In the Loyalty Promotions list, select the promotion that uses the rule.
3. Click the Name field of the Rule to display view details, and in the link bar, click Actions.
4. Add a new record to the Actions list, and in the Type field, select Update Attributes.
5. In the Detail form, complete the necessary fields, described in the following table.

Field	Comments
Object and Attribute	Use these fields to specify the attribute to be updated.
Action	Select the action to be performed on the attribute.
Object, Attribute, Operator, Value	Use these fields to build the expression that calculates the value with which to act on the attribute. These fields are used the same way here as they are for assign points actions, described earlier.

Using Invoke Custom Action

To create an action of the type Invoke Custom Action, you must create a method that performs the custom action.

The method must be implemented on the LOY Customer Action Business Service.

The following arguments are passed in to the method. Some of these arguments may not be present, depending on the processing context:

Argument	Context where it is specified
Member Id	Always
Transaction Id	Only for Rules that apply to transactions
Bucket Id	Only for rules that apply to attributes and for rules that apply to transactions that a promotion bucket has been created for
Promotion Id	Always
Promotion Rule Id	Always
Tier Id	Only for tier promotions

Using Redeem Points

This type of action is similar to Apply Points, described earlier, except for the following differences:

- The Expression section is used to calculate the number of points redeemed, not the number assigned.
- You do not specify whether the points are qualifying or non-qualifying.
- You do not specify when the points expire.

This type is used only in base promotions, not in promotions that are made visible to customers. For more information about base promotions, see "Creating Base Loyalty Promotions" on page 45.

Using Cancel Transactions

This type of action is used only for promotions where Apply To=Cancellation.

This type is used only in base promotions, not in promotions that are made visible to customers. For more information about base promotions, see "Creating Base Loyalty Promotions" on page 45.

Specifying the Tiers Applicable to Loyalty Promotions

If promotions apply only to members in certain tiers, you should specify those tiers in the Tiers view of the Loyalty Promotions screen. When you do this, the promotions will only be exposed to members in those tiers when members use eLoyalty.

For example, if a promotion applies only to Platinum members, add the Platinum tier to the Tiers list. Then Platinum members will be able to see this promotion when they use eLoyalty for member self-service, but other members will not.

If you do not specify any tiers here, then the promotion will be visible to all members in eLoyalty.

This task is a step in "Process of Creating Loyalty Promotions" on page 86. This task applies only to tier promotions.

NOTE: This task does not apply to tier promotions, because the tier they apply to is specified automatically when the Promotion record is created. For more information, see "About Creating Loyalty Tier Promotions" on page 85.

To specify the tiers a promotion applies to

1. Navigate to the Loyalty Promotions Administration screen.
2. In the promotions list, select the Promotion that you will specify tiers for.
3. Click the Tiers view tab.
4. Add one of more records to the Tiers list, and select the tiers that the promotion applies to.

Activating Loyalty Promotions

After you have finished creating a Loyalty Promotion, you must click the Activate button to activate it. Clicking Activate makes the promotion apply to transactions and makes it visible to users.

To activate a promotion

1. Navigate to the Loyalty Promotions Administration screen.
2. In the promotions list, select the Promotion that you will specify tiers for.
3. Click Activate.

Deactivating Loyalty Promotions

You can deactivate a promotion so it is no longer available to users. When you do this, the promotion will not generate extra rewards for members, and it will not be visible to your employees using the Loyalty Promotions screen, to Partners using the Partner Portal, or to members using Siebel eLoyalty.

After deactivating a promotion, you can reactivate it by following the instructions in "Activating Loyalty Promotions" on page 101.

To deactivate a promotion

1. Navigate to the Loyalty Promotions Administration screen.
2. In the promotions list, select the Promotion to be deactivated.
3. Click deactivate.

Modifying Loyalty Promotions

If you have already activated a promotion and you want to modify the promotion while keeping it active, use the Modify button.

After you click Modify, the changes you make in the promotion will not apply to users until you click Activate. The original promotion, without modifications, will continue to apply.

The original promotion remains in the cache, but changes you make are not loaded into the cache while you modify the promotion. Changes are loaded in the cache when you click Activate, making these changes apply.

This feature allows you to make all the changes needed in the promotion before exposing those changes to users.

To modify a promotion

1. Navigate to the Loyalty Promotions Administration screen.
2. In the promotions list, select the Promotion to be modified.

3 Click Modify.

4 Enter any data that is necessary to change the promotion, as described in "Process of Creating Loyalty Promotions" on page 86.

5 Click Activate.

Loyalty Promotion Examples

Loyalty promotions use the same framework of attributes, rules, criteria, and actions to create many different types of promotions. This section gives you examples of how to create several different types of promotions, including:

- "Example of Creating a Simple Frequency Promotion" on page 102
- "Example of Creating a Complex Frequency Promotion" on page 108
- "Example of Creating an Action-Based Promotion" on page 115

There is also an example of how to create a tier promotion in "Example of Creating Tier Promotions" on page 55.

Example of Creating a Simple Frequency Promotion

A simple frequency promotion requires a member to complete some action a specific number of times to receive a bonus. In this example, the member must fly from SFO to LAX three times to receive 3,000 bonus points.

This example assumes that you have already created the loyalty program and the product needed for this promotion.

This example shows one possible use of simple frequency promotions. Your use of these promotions may differ, depending on your business model.

To create a simple frequency promotion, perform the following tasks:

1 "Creating the Promotion Record for the Simple Frequency Promotion" on page 102
2 "Specifying the Product for the Promotion" on page 103
3 "Creating the Attribute to Track Number of Flights" on page 103
4 "Creating an Attribute to Track Whether a Member Received This Bonus" on page 104
5 "Creating a Rule That Updates the Number of Flights Attribute" on page 104
6 "Creating a Rule That Gives the Member a Bonus" on page 105
7 "Creating an Action That Resets Attribute Value" on page 107
8 "Activating the Promotion" on page 108

Creating the Promotion Record for the Simple Frequency Promotion

The promotion record is a container for all the other information about the promotion.

To create the promotion record

1. Navigate to the Loyalty Promotions Administration screen.
2. Add a new Promotion record and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Name	Simple Frequency SFO-LAX Promotion
Always Apply	Yes
Apply To	Accrual-Product
Product Inclusion	Include Products

Specifying the Product for the Promotion

Because this promotion applies only to airline flights, you selected Include Products in the Product Inclusion when you created the promotion. Now you must specify the product it applies to.

To specify the product for this promotion

1. Click the Promotion # field.
2. Click the Products view tab.
3. Add a new Product record and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Name	Airline Flight

Creating the Attribute to Track Number of Flights

You must create an attribute that tracks the number of times the member has flown from SFO to LAX, so it can be used in the promotion's rule.

To create the attribute to track number of flights

1. Click the Promotion-Specific Attributes view tab.
2. Add a new Promotion-Specific Attribute record and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Name	SFO-LAX Simple Freq Promo Att
Active	Yes
Field	Number 1

Field	Value
Default	0
Data Type	Number

Creating an Attribute to Track Whether a Member Received This Bonus

If you want a member to be able to receive the bonus only once during the promotion period, create a promotion-specific attribute that tracks whether the member was given the bonus.

NOTE: If the member can receive the bonus multiple times during the promotion's applicability period, only the one promotion-specific attribute described previously is required. Instead of this second attribute, you must add an action that resets the previously attribute SFO-LAX Simple Freq Promo Att to zero each time the member receives the bonus. This action will be described later.

To create the attribute to track whether a member received this bonus

1 Add a new Promotion-Specific Attribute record and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Name	Member Given Simple Freq Bonus
Active	Yes
Field	Text 1
Default	No
Data Type	Text

Creating a Rule That Updates the Number of Flights Attribute

You must create a rule that increments the value of this attribute every time the member flies from SFO to LAX.

To create a rule that updates the number of flights attribute

1 Click the Rules view tab.

2 In the Rules list, add a new record and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Sequence	1
Name	Update SFO-LAX Simple Freq Promo Attribute
Apply To	Transactions

3 Click the rule name.

4 In the Criteria list of the Promotion Rule Details view, add two criteria:

a Add a new Criteria record and complete the necessary fields shown in the following table.

Field	Value
Sequence	1
Name	Departure Airport = SFO
Type of Comparison	Compare to Values
Expression	[Transaction.Field.Origination Airport] = SFO

b Add a second Criteria record and complete the necessary fields shown in the following table.

Field	Value
Sequence	2
Name	Arrival Airport = LAX
Type of Comparison	Compare to Values
Expression	[Transaction.Field.Destination Airport] = LAX

5 In the link bar of the Promotion Rule Details applet, click Actions.

6 Add a new Action record and complete the necessary fields in the Action list and Detail form, shown in the following table.

This action updates the promotion specific criteria each time the member takes this flight

Field	Value
Name	Update SFO-LAX Simple Freq Promo Attribute by 1
Type	Update Attribute
Update this attribute: Object	Promotion
Update this attribute: Attribute	SFO-LAX Simple Freq Promo Att
Update this attribute: Action	Add
Value	1

Creating a Rule That Gives the Member a Bonus

You must also create a rule that gives the member a bonus when the attribute reaches 3, the number of flights required to receive the bonus.

If the member can only receive the bonus once, then you also need a second criteria that checks whether the member has not yet received a bonus as result of this promotion

To create a rule that gives the member a bonus

1 Add a new Rule record and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Sequence	2
Name	Give 3,000 Bonus When Fly SFO-LAX 3 Times
Apply To	Attributes

2 Click the rule name.

3 In the Criteria list of the Promotion Rule Details view, add a new Criteria record and complete the necessary fields in the record and the Compare to Values Detail form and Value list, shown in the following table.

Field	Value
Sequence	1
Name	If SFO-LAX Promo Attribute = 3
Type of Comparison	Compare to Values
Object	Promotion
Attribute	SFO-LAX Simple Freq Promotion Attribute
Condition	Equals
Value	3

4 In the Criteria list of the Promotion Rule Details view, add a new Criteria record and complete the necessary fields in the record and the Compare to Values Detail form and Value list, shown in the following table.

Field	Value
Sequence	2
Name	Member has not yet received bonus
Type of Comparison	Compare to Values
Object	Promotion
Attribute	Member Given Simple Freq Bonus

Field	Value
Condition	Equals
Value	No

5 In the link bar of the Promotion Rule Details applet, click Actions.

6 Add a new Action record and complete the necessary fields in the Action list and Detail form, shown in the following table.

   This action gives the member the 3,000 point bonus.

Field	Value
Sequence	1
Name	Give 3000 Regular Point Bonus
Type	Assign Points
Point Type	Regular
Value	3000

NOTE: Add does not necessarily have to be specified in the Update this attribute: Action field, because Add is the default action unless some other action is specified.

Creating an Action That Resets Attribute Value

If you want the member to be able to receive this bonus multiple times, add an action to reduce the number of flights attribute to zero. Then, after additional flights, increase this attribute and it reaches three again, the member will receive the bonus again.

If you want the member to receive this bonus only once, add an action to change the promotion-specific attribute tracking whether the member has received the bonus to Yes.

NOTE: Create only one of these two actions, depending on whether you want to give members the bonus multiple times or just one time.

To reset the number of flights attribute to zero

1 Add a new Action record and complete the necessary fields in the Action list and Detail form, shown in the following table.

Field	Value
Sequence	2
Name	Set SFO-LAX PS Att to Zero
Type	Update Attribute
Object	Promotion

Field	Value
Attribute	SFO-LAX Simple Freq Promotion Attribute
Action	Set
Value	0

To set the attribute tracking whether the member has received the bonus to yes

1. Add a new Action record and complete the necessary fields in the Action list and Detail form, shown in the following table.

Field	Value
Sequence	2
Name	Set Bonus Given Prom-Spec Att to Yes
Type	Update Attribute
Object	Promotion
Attribute	Member Given Simple Freq Bonus
Action	Set
Value	Yes

Activating the Promotion

Now, you are ready to activate the promotion.

To activate the promotion

- In the Promotion form, click the Activate button.

  The promotion will be active during the period between the start date and the end date.

Example of Creating a Complex Frequency Promotion

A complex frequency promotion gives members a varying bonus that depends on the number of times they buy a product during a given period.

For example, during a specific period:

- Fly DEN - CHI 3 times, receive 1,000 bonus
- Fly DEN - CHI 4 or 5 times, receive 3,000 bonus
- Fly DEN - CHI 6 or more times, receive 5,000 bonus

This sort of promotion does not give members bonus points when they make each purchase. Instead, it waits until the end of the promotion period, then it gives members a bonus based on the total number of purchase they made during the promotion period.

This example assumes that you have already created the loyalty program and the product needed for this promotion.

This example shows one possible use of complex frequency promotions. Your use of these promotions may differ, depending on your business model.

To create a complex frequency promotion, perform the following tasks:

- "Creating the Promotion Record for the Complex Frequency Promotion" on page 109
- "Specifying the Product for the Promotion" on page 110
- "Creating the Attribute for the Promotion" on page 110
- "Creating a Rule That Updates the Attribute" on page 110
- "Creating Rules That Give the Members Bonuses" on page 112
- "Activating the Promotion" on page 115

Creating the Promotion Record for the Complex Frequency Promotion

The promotion record is a container for all the other information about the promotion.

When you create the promotion record, you do not have to select Always Apply, because this promotion will be processed at a pre-set date and the decision to give bonus points will not be triggered by a transaction.

The Final Action Date field determines when this promotion is processed. You should set it for several days after the end of the promotion, to give time for all applicable transactions to be processed. To view this field, you must click the More button on the Promotion form. The engine will process the promotion on the day after the date specified in this field.

To create the promotion record

1. Navigate to the Loyalty Promotions Administration screen.
2. Add a new Promotion record and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Name	Complex Frequency DEN - CHI Promotion
Always Apply	No
Apply To	Accrual Product
Promotion Start	1/21/2004
Promotion End	4/1/2004
Include Product	Yes

3 Click the Promotion #.

The Promotion form appears.

4 In the Promotion form, click the More button.

5 In the Final Action Date field, enter 4/6/2004.

Specifying the Product for the Promotion

Because this promotion applies only to airline flights, you selected Include Products in the Product Inclusion when you created the promotion. Now you must specify the product it applies to.

To specify the product for this promotion

1 Click the Products view tab.

2 Add a new Product record and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Name	Airline Flight

Creating the Attribute for the Promotion

You must create an attribute that will be used by this promotion's rule. This attribute will be used to count the number of times that the member takes the DEN - CHI flight.

To create the attribute for this promotion

1 Click the Promotion-Specific Attributes view tab.

2 Add a new Promotion-Specific Attribute record and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Name	DEN - CHI Complex Freq Promo Attribute
Active	Yes
Field	Number 1
Default	0
Data Type	Number

Creating a Rule That Updates the Attribute

You must create a rule that increments the value of the attribute every time the member takes a DEN - CHI flight.

To create a rule that updates the attribute

1. Click the Rules view tab.
2. In the Rules list, add a new record and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Sequence	1
Name	Update the DEN - CHI Complex Freq Promo Attribute
Apply To	Transactions

3. Click the rule name.
4. In the Criteria list of the Promotion Rule Details view, add two criteria to check that the transaction is a DEN - CHI flight:

   a. Add a new Criteria record and complete the necessary fields in the record and in the Compare to Values detail form, as shown in the following table.

Field	Value
Sequence	1
Name	Departure Airport = DEN
Type of Comparison	Compare to Values
Object	Transaction
Attribute	Departure Airport
Condition	Equals
Value	DEN

   b. Add a second Criteria record and complete the necessary fields in the record and in the Compare to Values detail form, as shown in the following table.

Field	Value
Sequence	2
Name	Arrival Airport = CHI
Type of Comparison	Compare to Values
Object	Transaction
Attribute	Arrival Airport
Condition	Equals
Value	CHI

5 In the link bar of the Promotion Rule Details applet, click Actions.

6 Add a new Action record and complete the necessary fields in the Action list and Detail form, shown in the following table.

This action updates the promotion specific criteria each time the member takes this flight.

Field	Value
Sequence	1
Name	Update Promo-Specific DEN-CHI Attribute
Type	Update Attribute
Update this attribute: Object	Promotion
Update this attribute: Attribute	DEN - CHI Complex Freq Promo Attribute
Update this attribute: Action	Add
Value	1

Creating Rules That Give the Members Bonuses

You must also create rules that give the members bonuses. You must create three of these rules:

- A rule to give 1,000 points to members who fly from DEN to CHI 3 times during the promotion period.
- A rule to give 3,000 points to members who fly from DEN to CHI 4 or 5 times during the promotion period.
- A rule to give 5,000 points to members who fly from DEN to CHI 6 or more times during the promotion period.

To create a rule that give the members a 1000 point bonus for 3 flights

1 Add a new Rule record and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Sequence	2
Name	If DEN-CHI Flights = 3, Give 1,000 Points.
Apply To	Attributes

2 Click the rule name.

3 In the Criteria list of the Promotion Rule Details view, add a new Criteria record and complete the necessary fields in the record and in the Compare to Values detail form, as shown in the following table.

Field	Value
Sequence	1
Name	# of DEN-CHI Flights = 3
Type of Comparison	Compare to Values
Object	Promotion
Attribute	DEN - CHI Complex Freq Promo Attribute
Condition	Equals
Value	3

4 In the link bar of the Promotion Rule Details applet, click Actions.

5 Add a new Action record and complete the necessary fields in the Action list and Detail form, shown in the following table.

Field	Value
Sequence	1
Name	Give 1,000 Regular NQ Points
Type	Assign Points
Point Type	Regular
Value	1000

To create a rule that gives the members a 3000 point bonus for 4 or 5 flights

1 Add a new Rule record and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Sequence	3
Name	If DEN-CHI Flights = 4 or 5, Give 3,000 Points.
Apply To	Attributes

2 Click the rule name.

3 In the Criteria list of the Promotion Rule Details view, add a new Criteria record and complete the necessary fields in the record and in the Compare to Values detail form, as shown in the following table.

Field	Value
Sequence	1
Name	# of DEN-CHI Flights = 4 or 5
Type of Comparison	Compare to Values
Object	Promotion
Attribute	DEN - CHI Complex Freq Promo Attribute
Condition	Equals
Value	4
Value	5

NOTE: Add two rows to the Value list. Enter 4 in one and 5 in the other.

4 In the link bar of the Promotion Rule Details applet, click Actions.

5 Add a new Action record and complete the necessary fields in the Action list and Detail form, shown in the following table.

Field	Value
Sequence	1
Name	Give 3,000 Regular NQ Points
Type	Assign Points
Point Type	Regular
Value	3000

To create a rule that gives the members a 5000 point bonus for 6 or more flights

1 Add a new Rule record and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Sequence	4
Name	If DEN-CHI Flights >= 6, Give 5,000 Points.
Apply To	Attributes

2 Click the rule name.

3 In the Criteria list of the Promotion Rule Details view, add a new Criteria record and complete the necessary fields in the record and in the Compare to Values detail form, as shown in the following table.

Field	Value
Sequence	1
Name	# of DEN-CHI Flights >= 6
Type of Comparison	Compare to Values
Object	Promotion
Attribute	DEN - CHI Complex Freq Promo Attribute
Condition	Is Greater Than
Value	5

4 In the link bar of the Promotion Rule Details applet, click Actions.

5 Add a new Action record and complete the necessary fields in the Action list and Detail form, shown in the following table.

Field	Value
Sequence	1
Name	Give 5,000 Regular NQ Points
Type	Assign Points
Point Type	Regular
Value	5000

Activating the Promotion

Now that all the rules have been set up, you are ready to activate the promotion.

After the promotion is activated, it will keep track of the number of times that members fly between the start date and the end date. Then, on the day after the date in the Final Action Date field, it will give points to members based on the total number of DEN-CHI flights they took during this period.

To activate the promotion

- In the Promotion form, click the Activate button.

  The promotion will be active during the period between the start date and the end date.

Example of Creating an Action-Based Promotion

An action-based promotion rewards members for some action other than a purchase. Examples are:

- When you update your member profile, you get 500 bonus points.
- When you register with our loyalty program, you get 1,000 bonus points.
- When you refer a new member, you get 1,000 bonus points.

This example in this section shows how to create an action-based promotion that gives 1000 bonus points when you register in an airline's loyalty program.

This example assumes that you have already created the loyalty program.

This example shows one possible use of action-based promotions. Your use of these promotions may differ, depending on your business model.

To create an action-based promotion, perform the following tasks:

- "Creating the Action-Based Bonus Product" on page 116
- "Creating the Promotion Record" on page 116
- "Specifying the Product for the Promotion" on page 117
- "Creating a Rule for the Action-Based Promotion" on page 117
- "Activating the Promotion" on page 119

Creating the Action-Based Bonus Product

The first step in creating an action-based bonus is to create a product that the system uses when members perform the action.

To create the action-based bonus product

1. Navigate to the Administration - Product screen.
2. In the Products list, add a new record and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Name	Enrollment Bonus
Part #	Enrollment Bonus
Description	Bonus for enrolling in the loyalty program.
Type	Airline
Orderable	Yes
Track As Asset	Yes

Creating the Promotion Record

You must create a promotion record for the action-based promotion, which is a container for all the other information about the promotion.

To create the promotion record

1. Navigate to the Loyalty Promotions Administration screen.
2. Add a new Promotion record and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Name	Enrollment Promotion
Always Apply	No
Apply To	Accrual-Product
Product Inclusion	Include Products

Specifying the Product for the Promotion

Now, you must associate this promotion with the action-based bonus product that you created earlier.

You selected Include Products when you created the promotion, and you must also go to the Products view to specify the product it applies to.

To specify the product for this promotion

1. Click the Promotion # field.
2. Click the Products view tab.
3. Add a new Product record and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Name	Enrollment Bonus
Part #	Enrollment Bonus

Creating a Rule for the Action-Based Promotion

Next, you must create a rule for this promotion that gives customers the bonus when they register for the loyalty program.

To create a rule that gives customers a bonus when they register

1. Click the Rules view tab.

2. In the Rules list, add a new record and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Name	When member enrolls give 1000 points
Apply To	Transactions

3. Click the rule name.
4. In the Criteria list of the Promotion Rule Details view, add a new record and complete the necessary fields shown in the following table.

Field	Value
Sequence	1
Name	Enrollment
Type of Comparison	Compare to Values

5. In the Compare to Values Detail applet, click New and complete the necessary fields shown in the following table.

Field	Value
Object	Transaction
Attribute	Product
Condition	Equals

6. In the Values applet below the Compare to Values Detail applet, add a new record and select the product that you created for this promotion, as shown in the following table.

Field	Value
Value	Enrollment Bonus

7. In the link bar, click Actions.
8. Add a new Action record and complete the necessary fields in the Action list and Detail form, shown in the following table.

Field	Value
Sequence	1
Name	Give 1K Points
Type	Assign Points

Field	Value
Point Type	Regular
Value	1000

Activating the Promotion

Now that you have set up this promotion, you can activate it.

To activate the promotion

- In the Promotion form, click the Activate button.

  The promotion will be active during the period between the start date and the end date.

6 Host Organization’s Use of Siebel Loyalty

This chapter covers the ways that employees at the host company use Siebel Loyalty after the application, programs, and promotions have been set up. It includes the following sections:

About the Host Organization’s Use of Siebel Loyalty

After the loyalty administrator has set up loyalty programs and promotions, member service representatives work directly with program members. For example:

- A customer may telephone a member service representative and ask to be enrolled as a member in a loyalty program.
- A member may telephone a member service representative and ask to redeem points for a reward.

Salespeople also work with program members. For example, salespeople will sell products that earn bonus points for members. Depending on your business model, salespeople may redeem members' points for rewards.

This chapter covers the ways that member service representatives, salespeople, and other employees of the host organization work with members of loyalty programs.

Other people can also perform some of the same tasks as your employees:

- **Partners.** Depending on your business model, member service representatives at partner companies may perform some of these tasks for your members. For more information, see Chapter 7, "Partner Use of Siebel Loyalty."
- **Members.** Members can use eLoyalty to perform some of these tasks for themselves. For more information, see Chapter 8, "Member Self-Service with Siebel eLoyalty."

Enrolling Members in Loyalty Programs

There are four types of members of loyalty programs:

- **Individual.** This type of member includes people who join programs on their own behalf. They must make purchases themselves to earn points.
- **Household.** This type of member includes people who join programs on behalf of their household. Any household member can make purchases to earn points.
- **Account.** This type of member includes companies that join programs. The company earns points for its purchases.
- **Partner.** This type of member includes companies that are partners that join programs. For example, a dealer may be a partner of an automobile manufacturer, because its customers earn the manufacturer's points when they buy cars. The same dealer may join a loyalty program as a member, so the manufacturer will reward it with points for meeting sales goals.

To enroll a new member in a loyalty program, the member service representative must perform two steps:

- Enter member information, such as name, address, and communication preferences.
- Assign the member a user name and password. The user name and password are always assigned to a person, not to a company. If the member is an account, partner, or household, the password is assigned to the person who is the primary contact.

NOTE: You must enter additional information if this is a multi-level loyalty program, see "Enrolling Members in Multi-Level Loyalty Programs" on page 124.

To enter member information

1. Navigate to the Loyalty Members screen.
2. Add a new record to the Members list, list and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Name	Enter the name of the member. This could be the name of an individual, an account, a household, or a partner.
Member Type	Choose one of the four types of members of loyalty programs: individual, household, account, or partner.
Contact	Enter one or many contacts associated with this membership.
Account	If the member type is account or partner, select the company name.
Household	If the member type is household, enter the household name.
Referred By	Select the name of the member who referred the new member, if applicable.

3. Enter address information for the new member:
   a. If the member type is Account or Partner, click the Account Addresses view tab and complete the necessary fields.
   b. If the member type is Individual, click the Contact Addresses view tab and complete the necessary fields.
   c. If the member type is Household, click the Household Addresses view tab and complete the necessary fields.
4. Click the Communications Preferences view tab and enter information about how to contact the member.
5. Click the Credit Cards view tab and enter information about the member's credit cards. Two scenarios are possible:
   - Individuals supply their own credit cards.
   - Companies supply a corporate credit card and the name of the employee who has the card.

   This credit information will be used as the default payment method for loyalty transactions requiring payment.
6. Optionally, click the Hobbies view tab and enter information about the member's hobbies.
7. Optionally, you can also enroll the new member in your partner's loyalty programs:
   a. Click the Partner Membership view tab.
   b. Add a new record to the Partner Membership list, and complete the necessary fields.

To assign a member a user name and password

1. Navigate to the User Administration screen.
2. From the Show drop-down list, choose Users.
3. Add a new record to the All Users list, and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Last Name and First Name	If the member is an individual, enter the name of that person. If the member is a household, account, or partner, enter the name of the primary contact for the member.
User ID	Enter the log-in name for the user.
Password	Enter the password for the user.
Challenge Question	Enter a question that users can enter to establish their identity if they forget their log-in name or password.
Challenge Answer	Enter an answer to the challenge question.
Responsibility	Select the appropriate responsibility for members. The responsibility differs based on implementation, depending on the host company's policies.

Enrolling Members in Multi-Level Loyalty Programs

A multi-level loyalty program is a program that rewards a member on the basis of other members' behavior. Examples of multi-level loyalty programs are:

- **Insurance companies and agents.** An insurance underwriter sets up a loyalty program for insurance agencies and their agents. Both the insurance agency and the agents receive a bonus when an agent sells the underwriter's products. Alternatively, just the insurance agency may receive a bonus when the agent sells the underwriter's products.
- **Distributors and sub-distributors.** A manufacturing company uses distributors to sell its products, and these distributors use sub-distributors to sell these products. For example, the manufacturer sends goods by the shipping container to the distributors, the distributors ship the goods by the pallet to the sub-distributors, and the sub-distributors ship individual products to retail stores. The manufacturer sets up a loyalty program to reward distributors for sales (to encourage them to sign up more sub-distributors) and also to reward the sub-distributors for their sales.

A multi-level loyalty program has a parent member and children members. In the examples:

- Insurance agencies are parent members and their agents are children members.
- Distributors are parent members and their sub-distributors are children members.

To enroll members in a multi-level loyalty program

1. Enroll parent members and children members separately, as described in "Enrolling Members in Loyalty Programs" on page 122.
2. Associate children members with their parent members.

To associate a child member with a parent member

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the record for the parent member.
3. Click the Child Members view tab.
4. In the Child Members list, add one or more new records.
5. In the Contact field, Account field, or Household field of each new record, select a child member for this parent member.

   The field you use to select the child member depends on the member type of the child member.

Entering Member Referrals

When you enroll a new member, you can enter the member who referred the new member.

The member referrals list can potentially be used to give out reward points to members who refer many new members.

NOTE: If members register through the Web and enter the members who refer them, these referrals are also displayed in the Referrals list.

To enter a member referral

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the member who referred a new member.
3. Click the Referral view tab.
4. In the Referral list, click New, and complete the necessary fields that describe the new member.

Registering Members for Loyalty Promotions

Some promotions are automatically available to all members.

Other promotions are only available to members who register. These are called opt-in promotions.

When members learn about opt-in promotions, they can register themselves on the eLoyalty Web site, or they can have a member service representative register them.

The Promotions view of the Members screen lists all opt-in promotions that a member is registered for, regardless of who registered the member, so it can be used to view all the promotions that a member is registered for. This same view is used to register the member for a new promotion.

To register a member for a promotion

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the member to be registered.
3. Click the Promotions view tab.
4. Add a new record to the Promotions list.
5. The Loyalty Promotions dialog box appears.
6. In the Loyalty Promotions dialog box, select the appropriate promotion and click OK.

Entering Loyalty Members’ Transactions

Members can telephone member service representatives or salespeople to perform transactions. There are two types of transactions:

- **Accrual Transactions.** The member performs some activity that earns points. Some examples are flying between specified cities, staying in a hotel, spending money on a purchase, or selling products.
- **Redemption Transactions.** The member redeems points for a reward. Some examples of rewards are a product, a service, and an upgrade.

Some transactions may require manager approval. If so, the member service representative selects Submitted in the Status field. Then the manager can approve it using the Transaction Approval view of the Transactions screen.

Some transactions may also be rejected automatically. For example, a redemption transaction will be rejected if the member does not have enough points for this redemption. The member service representative can view the rejection in the Status field.

The member can also perform some of these transactions in other ways. For example, the member might earn points by purchasing a product from a retailer or redeeming points using eLoyalty. These transactions will also be listed in the Transactions view of the Loyalty Members screen, so member service representatives can use this view to look at a complete list of member transactions.

NOTE: As an alternative to the Members screen, transactions can also be entered in the Transactions screen.

To enter a transaction

1. Navigate to the Loyalty Members screen.
2. In the Members list, click the Member # field of the member.
3. Click the Transactions view tab.

4 Add a new record to the Transactions list, and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Created Date	Displays the date when the transaction occurred. This is used as the date when the customer earns the points.
Type	Select whether the transaction is an Accrual or Redemption.
Sub Type	Select the Subtype for the transaction. For accrual transactions, the subtypes are Action Based Bonus, Cancellation, Gift, Loan, and Product. For redemption transactions, the subtypes are Cancellation, Loan Payment, or Product.
Status	Select the status of the transaction from these options: ■ **In-Process.** Default status when a transaction is first created manually. ■ **Submitted.** The MSR selects this value if manager approval is required for this transaction. ■ **Cancelled.** The MSR can click the Cancel button to set the value of the status to Cancelled. This status is used to recall a transaction that it has been submitted for approval. After submitting a transaction, the MSR cannot change it without recalling it. ■ **Rejected - Manager.** The manger selects this value to approve the transaction. ■ **Approved.** The MSR or manager selects this value to approve the transaction. ■ **Acceptable.** The user can select Acceptable to process the transaction in real time by clicking the Process button. The engine will not process transactions with this status; the user must click the Process button. ■ **Queued.** The user can select Queued so the engine will process the transaction. A MSR may do this immediately after creating a transaction or after a transaction is approved. In addition, transactions that are imported in bulk are usually given this status. The field may also display the following values, generated by the application: ■ **Rejected - Engine: Insufficient Points.** The application sets the field to this value if the member does not have enough points for the redemption transaction. ■ **Rejected - Engine: Missing Member Data.** The application sets the field to this value if required data about the member is missing.

Field	Comments
Product Name	If the subtype is product, select the name of the product.
Base Points	Displays the number of base points one would receive or use for getting a product if there were no promotion. All calculations for the promotion are based on this value.
Point Name	Select the point type. For more information about point types, see "Creating Point Types for Loyalty Programs" on page 14.
Qualifying Points	Displays whether these points are qualifying points.
Submit To	Displays the user ID of the person who must approve the transaction. Defaults to the MSR's manager. The MSR can choose a different value to submit this transaction to someone else for approval.
Voucher #	If this is a redemption of a voucher, enter the voucher number.
Voucher Type	If this is a redemption of a voucher, enter the voucher type.
Voucher Qty	If this is a redemption of a voucher, enter the quantity of vouchers redeemed.

5 You can view more information about this transaction by scrolling down to look at the Accrual Items list, if this is an accrual transaction, or to look at the Redemption Items list, if this was a redemption transaction. Both these lists are read-only.

Cancelling Loyalty Members' Transactions

You can cancel members' accrual or redemption transactions. For example:

- If members mistakenly redeem points for a product they do not want, they can call the help desk to have the member service representative cancel the redemption. They must call before the redemption has been fulfilled.
- If members change their minds and decide to earn points in a partner's loyalty program instead of in your loyalty program, they can call the help desk to have the member service representative cancel the accrual that they earned previously.

An accrual transaction can be cancelled only if the cancellation does not change the member's tier or the member's promotion bucket. If it does change either of these, the application will display an error message and will not allow the cancellation.

If a member cancels a redemption, some of the points may have expired since the member redeemed them. If so, these points will no longer be available if the redemption is cancelled. These points are added back to the member's account, but they are past their expiration date and cannot be used. It is necessary for these points to be expired, because otherwise members could perform transactions and then cancel them, in order to avoid point expiration dates.

To cancel a transaction

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the member.
3. Click the Transactions view tab.
4. In the Transactions list, use a query to find the transaction that the member wants to cancel.
5. With that redemption selected, click Cancel Transaction.

Entering and Modifying Loyalty Members' Service Requests

Members can enter service requests in the Loyalty Web site or can contact member service representatives with their service requests.

Member service representatives should be designated to view and deal with these service requests. One or more employees should be designated to assign service requests entered through the Web site to the appropriate owner.

Member service representatives should change the value in the Status field as they work on and close the service request.

To enter, view, or modify a member service request

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the member.
3. Click the Service Requests view tab.
4. To view or modify a service request, locate it in the Service Requests list and make any necessary changes.
5. To add a service request, add a new record to the Service Requests list, list and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Summary	Enter a description of the service that the member requests.
Account	If the member is an account or partner, select the company name.
Last Name	If the member is an individual or household, select the member name.

Field	Comments
Status	Choose the status of the service request, for example, Pending, Submitted, Approved, or Closed. The member can view this status on the Web site.
Owner	By default, the employee, partner, or customer who enters the service request is the owner. If necessary, select the appropriate owner, who will deal with the service request. The service request will be visible to the owner in My Service Requests view.

Giving Vouchers to Loyalty Members

A voucher entitles a member to a specific product. For example, a voucher might entitle a member to an upgrade on an airline flight or on an automobile rental.

Member service representatives can give vouchers to members and must record the dates when vouchers are redeemed.

Before the member service representative can give the voucher, a loyalty administrator must create it. For more information, see “Creating Vouchers for Loyalty Members” on page 42.

Giving Vouchers to Members

Member service representatives may give vouchers to members for a number of reasons, depending on your business model. For example, if a flight was delayed, all members on that flight might get a voucher for an upgrade on a future flight.

To give a voucher to a member

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the member.
3. Click the Vouchers view tab.
4. Add a new record to the Vouchers list, and complete the necessary fields.

Recording That a Voucher Has Been Redeemed

When a member redeems a voucher, the member service representative must enter the date when it was used. The status of the voucher changes, so it cannot be used again.

To record that a voucher has been used

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the member.
3. Click the Vouchers view tab.

4 In the voucher that has been used, in the Used Date field, enter the date when the voucher was used.

Changing Loyalty Members’ Tier Status Manually

Tier status is automatically calculated based upon the number of qualifying points a member has earned.

In special situations, you may want to manually change a member's tier status. For example, a consultant who travels continuously is a Platinum member, but this consultant is assigned to a project that requires no travel for nine months. By default, the consultant would lose Platinum status. Because you know the consultant will be a valuable customer again after this project is completed, you manually assign the customer Platinum status.

Before changing a member’s tier status manually, a member service representative must investigate whether the member should be awarded a special status. This decision depends on your business model, but before doing it, the member service representative might evaluate the member by:

- “Viewing Loyalty Members’ Point Balances” on page 136
- “Entering and Viewing Loyalty Members’ Value Scores” on page 139
- “Viewing Loyalty Members’ Activities” on page 138

Entering and Submitting the Special Tier Status

When member service representatives decide that members should be awarded the special status, they enter the status and submit it to a manager for approval.

To enter and submit a special tier status

1 Navigate to the Loyalty Members screen.

2 In the Members list, select the member.

3 Click the Tiers view tab.

4 Add a new record to the Tiers list, and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Tier	Select the special tier status.
Start Date	Enter the date when the special tier status becomes active and overrides the default tier status.
End Date	Enter the date when the special status is no longer active.
Submit To	Select the manager who must approve this request.

5 Click Process.

Approving or Rejecting the Special Tier Status

The responsible manager reviews the request for special tier status and approves it or rejects it.

To approve or reject the special tier status

1. Navigate to the Loyalty Members screen.
2. In the link bar, click Member Tier for Approval List.

   The My Tier Approvals list appears, with all the tier changes that this manager must approve.
3. To approve the special status, select Approved in the Approval Status field.
4. To reject the special status, select Rejected in the Approval Status field.
5. If an additional level of approval is required, select the manager who must give this approval in the Submit To field.

Contacting the Member

The member service representative views the status field and contacts the member to tell the member that the request for special status has been approved or rejected.

Entering Loyalty Members’ Travel Profiles

You can track members’ travel profiles to provide them with service more effectively and to target promotions.

For example, the travel profile can track members’ airline meal preferences, their preferred hotels, and their preferred car-rental agencies.

Members can enter their travel profile through the eLoyalty Web site, or the Member Service Representative can enter the travel profile.

To enter a member’s travel profile

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the member.
3. Click the Travel Profile view tab.
4. In the Travel Profile form, complete the necessary fields.

Creating a Loyalty Membership Card Manually

Members use their membership cards to show that they are members of a specific loyalty program or of a specific tier in that program.

For example:

- In the retail industry, members often must swipe their membership card before making purchases in order to receive points.
- In the airline industry, members usually must show their membership cards to prove their tier status in order to be able to use special lounges.

Membership cards are generated automatically when members join a loyalty program or receive a new tier status.

Member service representatives can also generate membership cards manually. This is useful if members lose their cards.

To create a membership card manually

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the member.
3. Click the Membership Cards view tab.
4. In the Membership Cards list, locate the card that is being replaced and change its status to Lost or Stolen.
5. Add a new record to the Membership Cards list, and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Tier	Select the member's tier, which you can find in the Member form above the Memberships Card list.
Expiration Date	Enter the date when the membership card will expire.
Expiration Date on Card	Displays the date when the membership card will expire.

Lending Points to Loyalty Members

If a member has almost enough points to qualify for a desired redemption, some companies will lend the member enough points to qualify. Then the member will have a negative point balance, until the member accrues more points.

Setting Up Automatic Loan Approval

You can allow automatic approval of loans for a specified number of points, so a manager does not have to review the loan request.

For example, you could allow loans for certain amounts depending on tier status.

The procedure below shows how to enter the amount for automatic loan approval manually. However, you could also create a workflow to enter this amount automatically whenever a customer’s tier changes. For more information about workflows, see *Siebel Business Process Designer Administration Guide*.

To set up automatic loan approval

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the member.
3. Click the More Info view tab.
4. In the Administration section of the More Info form:
   - In the Max Point Loan field, enter the maximum number of points that may be loaned to this member automatically, without manager review.
   - In the Max Point Loan status field, select Accepted.

Lending Points to a Member

To decide whether to loan a member points, the member service representative can perform these tasks:

- “Viewing Loyalty Members’ Point Balances” on page 136
- “Entering and Viewing Loyalty Members’ Value Scores” on page 139

After deciding to lend a member points, the member service representative uses the Loans view to create the loan.

To lend points to a member

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the member.
3. Click the Loans view tab.
4. Add a new record to the Loans list, and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Type	Select Accrual.
Subtype	Select Loan.

Field	Comments
Product	Select the product that the points will be redeemed for.
Points	Enter the number of points that will be loaned.
Point Name	Select the point type. For more information about point types, see "Creating Point Types for Loyalty Programs" on page 14.
Submit To	Select the manager who must approve this request. By default, this field contains the name of the member service representative's manager. The member service representative may change this value, if, for example, the manager is on vacation.
Status	Select Submitted to submit the loan for approval.

Approving the Loan

If you have set up automatic loan approval and if this loan is less than or equal to the number of points that can be approved automatically, the status automatically changes to approved.

If it is not approved automatically, the manager must view the record and manually change the status to approved or rejected.

When the loan is approved, an email is automatically sent to inform the customer.

Member service managers should regularly search for accruals that need their approval.

To find accruals that need manager approval

1. Navigate to the Loyalty Transactions screen.
2. From the Show drop-down list, choose Transaction Approval.

   The list includes all transactions that need manager approval, including loans.
3. To approve a transaction, select Approved in the Status field.
4. To reject a transaction:
   a. Select Rejected - Manager in the Status field.
   b. Click the Notes view tab.
   c. Add a record to the Notes list and enter the reason for rejecting the loan.

Contacting the Member

After looking in the Loans list to whether that a loan has been approved, the member service representative informs the member that the loan has been approved or rejected.

Redeeming the Loan

The loaned points remain available to the member until the member redeems the loan.

When the member redeems the loan by making a purchase, the points are temporarily debited from the member’s account.

The redemption is fulfilled by an external system, which must be integrated with Siebel Loyalty.

After the fulfillment is complete, the points are permanently debited from the member’s account.

Viewing Loyalty Members’ Point Balances

A member service representative can view members’ point balances:

- To answer members’ question about how many points they have.
- To decide whether to change members’ tier status, as described in “Changing Loyalty Members’ Tier Status Manually” on page 131.

To view a member’s point balance

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the member.
3. Click the More Info view tab.

   The member’s point balance in the programs the member is enrolled in appears in the Points section, in the Available Points fields.

Viewing Loyalty Members’ Point Items

The member service representative can use the Point Items list to view all of the transactions where a member has accrued points, with the quantity and expiration date of the points earned in each transaction.

To view a member’s point items

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the member.
3. Click the Point Items view tab.

   The Point Items list includes all transactions that earned points for the member. The total number of points that the member has available is displayed in the Available Point field of the Members form.

Viewing Loyalty Members' Transaction Histories

Employees, members, and partners need to be able to see the points that were credited or debited to a member based upon members' transactions. For example, you may have to look at the transaction history to resolve members' questions about their point balance.

The Transactions view of the Members screen allows you to look at the history of all the transactions that affected a given member's point balance.

For more information about the Transactions view, see "Entering Loyalty Members' Transactions" on page 126.

Viewing or Printing Loyalty Members' Statements

Statements are the main method used to communicate with members. They include information about the member's current tier, point balance, recent transactions, and available and used vouchers. Marketing materials also are often sent with statements.

Members may receive statements by mail or by email, depending on their communication preference. You can integrate with a third-party fulfillment service and send the information for statements to the fulfillment house to be printed and mailed to members. For more information about specifying how frequently statements are sent, see "Defining Tier Classes and Tiers" on page 37.

Siebel Loyalty stores a record of all statements that have been sent to members. If a member calls with a question about the statement, the member service representative can look up the information in the statement.

Member service representatives can also view the statement report and can print this statement manually. The statement report takes all the data and totals tracked with a statement and puts it in a format that can be mailed, faxed, or emailed as an attachment to a member. It is the same as the statement that is mailed to the member.

To view statement information for a member

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the member.
3. Click the Statements view tab.
4. In the Statements list, click the number of a statement to view details about that statement:
   - The Statement form and More Info form include general information, such as the program the member is in, the start date and end date for the statement, the number of qualifying and non-qualifying points accrued during the period, the number of points redeemed during the period, and the number of points needed to move to the next tier.
   - The Tier Attributes view lists the attributes that are used to calculate when the member reaches different tiers.

- The Transactions view lists all the member’s transactions for the period of the statement.
- The Vouchers Outstanding view lists any vouchers that are available to the member.
- The Vouchers Used view lists any vouchers that the member used during the statement period.

To print a statement

1. Navigate to the Loyalty Statements screen.
2. In the Statements list, query on the Name field to find the statement for a specific member.
3. Click the Statement # of the statement you want to print.
4. Click the Reports button and select Statement.
5. Use the Reports window to print the statement.

Viewing Loyalty Members’ Activities

An Activity record is created whenever there are significant actions that affect a member’s loyalty account, such as:

- Registration
- Tier Change
- Accruals
- Redemptions
- Membership Cards
- Lounge Membership
- Vouchers
- Service Requests

Member service representatives can also create activities for members manually.

Thus, the member’s activities list gives you an overview of what that member has done.

To view a member’s activities

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the member.
3. Click the Activities view tab.

Entering and Viewing Loyalty Members' Value Scores

As the member value score, you can select a number from 1 to 5, to indicate the member's value as a customer.

To enter or view a member's value score

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the member.
3. Click the More Info view tab.

   The member's value score appears in the Member Value and Grouping section, in the Lifetime Value Score field.

4. To enter the member's value score, select a value in the Lifetime Value Score field.

Viewing Loyalty Members' Promotions

Some promotions are automatically available to all members. Other promotions are only available to members who register.

To answer member questions, member service representatives can view all the promotions that a member has registered in.

Members can also use eLoyalty to view the promotions they have enrolled in. For more information, see "Overview of Member Use of Siebel eLoyalty" on page 147.

To view the promotions that a member has registered in

1. Navigate to the Loyalty Members screen.
2. In the Members list, click the name of the member.
3. Click the Promotions view tab.
4. In the link bar, click Applicable Promotions.

Viewing Loyalty Members' Attributes

Attributes are used in the rules that calculate promotions. They can also be used to track many member behaviors, such as:

- The number of flights a member took.
- The number of times a member purchased a specific product.
- The number of nights a member stayed in a hotel.

In the Member Attributes view, the user can see all attributes that are being tracked for a given member and see the member’s progress against these attributes.

For more information about defining attributes, see “Creating Attributes for Loyalty Promotions” on page 86.

To view a member’s attributes

1. Navigate to the Loyalty Members screen.
2. In the Members list, click the Member # of the member whose attributes you want to view.
3. Click the Member Attributes view tab.

Viewing Loyalty Members’ Promotion Attributes

Promotion attributes are the rules that determine what rewards members get for participating in promotions. For more information about promotion attributes, see “Creating Attributes for Loyalty Promotions” on page 86.

In order to answer members’ questions, member service representatives can view the promotion attributes for all the opt-in promotions that a member is participating in. This list only displays information for opt-in promotions, not for promotions that apply to all members.

To view a member’s promotion attributes

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the member.
3. Click the Promotion Attributes view tab.

7 Partner Use of Siebel Loyalty

This chapter gives you background information about how partners use Siebel Loyalty:

- "About Partner Use of Siebel Loyalty" on page 141
- "Overview of Partner Use of Siebel Loyalty" on page 142
- "Scenario for Partner Use of Siebel Loyalty" on page 142

This chapter also explains the tasks that you perform at the brand owner company in order to manage partners, including the following tasks:

- "Creating Joint Loyalty Promotions with Partners" on page 143
- "Selling Loyalty Points to Partners" on page 144
- "Sending Transactions to Partners for Review" on page 145

For more information about giving partners access to Siebel Loyalty, see "Process of Setting Up Partner Access to Siebel Loyalty" on page 23.

About Partner Use of Siebel Loyalty

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

Partners can use the Loyalty Partner Portal to work with members of loyalty programs in much the same way that the brand owner's member service representatives work with members.

The loyalty administrator at the brand owner company sets up loyalty programs and promotions.

Depending on the business model, either member service representatives at the brand owner company or employees at partner companies can work with members of these loyalty programs:

- Supermarkets deal directly with their customers, so they can have their own member service representatives work with loyalty program members.
- Automobile manufacturers deal with their customers through dealers, which are partner companies, so they can allow these partners to work with loyalty program members.
- Airlines deal with their customers both directly and through travel agencies, which are partner companies. They can allow both their own member service representatives and travel agents to work with members.

Overview of Partner Use of Siebel Loyalty

The Siebel Loyalty Partner Portal has three different types of functionality:

- It includes the functionality of the standard Siebel Partner Portal, as described in *Siebel Partner Relationship Management Administration Guide*.
- It includes functionality that allows partners to work with members in many of the same ways that your own member service representatives work with members. There are some minor differences between the Siebel Loyalty Partner Portal and the screens of Siebel Loyalty that your own member service representative use, because the Partner Portal supports standard interactivity and Siebel Loyalty supports high interactivity, but these screens are used in similar ways.
- It includes functionality to support tasks that apply only to partners.

A few of the most common tasks performed by partners are:

- **Enrolling Members.** Partners can enroll members and capture members' profile, much as your own MSRs do. When the partner clicks the Enroll button, the application sends an email to the loyalty program administrator and creates an activity record for the partner of the type new loyalty member. For more information about enrolling members, see "Enrolling Members in Loyalty Programs" on page 122.
- **Managing Member Transactions.** Partners can manage member transactions in many of the same ways that your MSRs do. If transactions require partner approval, the Approve and Reject buttons become available in the Partner Portal; only authorized partner representatives should have access to these buttons. For more information about managing member transactions, see "Entering Loyalty Members' Transactions" on page 126.
- **Collaborating On Loyalty Promotions.** Partners use the Partner Portal to collaborate on Loyalty Promotions. For more information, see "Creating Joint Loyalty Promotions with Partners" on page 143.
- **Collaborating On Campaigns.** Partners use the Partner Portal to collaborate on planning and executing marketing campaigns. For more information, see *Siebel Partner Relationship Management Administration Guide* and *Siebel Marketing Administration Guide*.

Scenario for Partner Use of Siebel Loyalty

This scenario gives one example of how partners may use Siebel Loyalty. Your partners may use Loyalty differently, depending on your business model.

The Partner Enrolls a New Member

An automobile manufacturer is running a special promotion, which allows dealers to give away 25,000 points with the purchase of any car.

A dealer sells a car to a customer who does not yet have a Loyalty account. The dealer uses the Loyalty Members screen of the Partner Portal to enroll the customer in the loyalty program. The dealer is able enroll the customer in one step, without waiting to be emailed the confirmation and activation URL.

The Partner Gives Points to a Member Manually

After enrolling the member, the dealer navigates to the Loyalty Transactions screen.

The dealer creates a new transaction record to give the member the 25,000 points. After filling in the new record, the dealer clicks Process, and receives confirmation that the transaction is complete.

The Partner Logs a Service Request

The dealer has questions about this promotion.

The dealer navigates to the Self Service screen of the Partner Portal, creates a new service request, and enters the question.

When the dealer logs into the Partner Portal again, several hours later, the dealer navigates to the Self Service screen and sees that the OEM has entered the answer to the question.

Creating Joint Loyalty Promotions with Partners

You create joint promotions with partners in much the same way that you create ordinary promotions:

- **Create a Joint Marketing Campaign.** Before creating the promotion, use Siebel Marketing to create a joint campaign with the partner. For more information, see *Siebel Marketing Administration Guide*.
- **Set Up a Promotion Based on Transactions with the Partner.** Create the promotion in the usual way, as described in "Process of Creating Loyalty Promotions" on page 86, and enter the following data:
  - **Promotions Based on Transactions with Only the Partner.** When you create the rule for the promotion, choose one or more partners in the Partner field. Then the rule will apply to member's transactions with these partners.
  - **Promotions Based on Transactions with the Partner or Host Company.** When you create the rule for the promotion, choose both the host company and one or more partner companies in the Partner field. Then the rule will apply to the member's transactions with either the host company or these partners.
  - **Promotions Based on Transactions with the Partner and Host Company.** Create a complex promotion, as described in "Example of Creating a Complex Frequency Promotion" on page 108. You can define this promotion so the member must have transactions with both the partner and the host company to get the bonus.

- **Sell Points to the Partner.** You may have to sell additional points to the partner for the promotion. Do this in the same way you sell points to partners for the loyalty program, as described in "Selling Loyalty Points to Partners" on page 144.

Selling Loyalty Points to Partners

Partners must purchase points from you, so they can give those points to members who make purchases.

When a partner submits a transaction that earns points for a member, those points are deducted from the partner's point balance. If the partner does not have enough points to give to the member, the transaction will be rejected.

Typically, partners purchase points in the following way:

- The host company makes points available for the partner to purchase, using the Point Blocks view of the Partners screen.
- The partner company purchases points by mailing a check to the host company.
- The brand owner activates the points after receiving the check, using the Point Blocks view of the Partners screen. This makes the points available to the partner.

The partner manager can view the information that the partner entered by going to the Point Block Purchases view of the Partners screen. The partner manager changes the status to approved in order to make the points available.

The Point Block view also lists all previous blocks of points that the partner has purchased, so the host company can also use it to view the partner's point purchasing history.

NOTE: Before you make the points available to partners, you must create the points, as described in "Minting Point Blocks for Loyalty Programs" on page 35.

To make points available for partners to purchase

1. Navigate to the Partners Screen.
2. In the Partners list, select the partner company that you will allow to purchase this point block.
3. Click the Point Blocks view tab.
4. Add a new record to the Point Blocks list, and complete the necessary fields.

To activate points so they can be used by partners

1. Navigate to the Partners Screen.
2. In the Partners list, select the partner company whose payment for the points you have received.
3. Click the Point Blocks view tab.
4. If necessary, use a query to find Point Blocks with the status Submitted for Approval.

5 In the Status field, choose Approved.

These points can be given to members who have transactions with this partner.

Sending Transactions to Partners for Review

Some transactions need to be reviewed and approved by partners. The host company might send transactions to a partner for approval if:

- The original partner transaction was wrong, and the host company sends a corrected transaction for approval.
- The companies are running a type of joint promotion that requires the partner’s explicit approval of transactions.

When you create these transactions, you should select the partner employee who should review it in the Submit To field.

The partner can receive the transaction for review in two ways:

- **Through the Partner Portal.** The partner reviews each transaction in the Transactions Approval view of the Transactions screen of the Partner Portal and selects the status Acceptable or Rejected.
- **Through an external application.** The transactions can be send back and forth between Siebel Loyalty and the partner’s external application. This option requires integration using Siebel Universal Application Network.

To submit a transaction to a partner for review

1. Navigate to the Transactions screen.
2. In the Transactions list, select that transaction to be reviewed.
3. In the Transaction form, in the Partner Name field, select the partner company that must review the transaction.
4. In the Status Field, select Submitted.

   NOTE: Check the Status field later to see whether the partner has approved or rejected the transaction.

8 Member Self-Service with Siebel eLoyalty

This chapter gives you background information about how customers and members can use Siebel eLoyalty through the Web. It covers the following topics:

For information about giving members access to Siebel eLoyalty, see "Setting Up Customer Access to Siebel eLoyalty" on page 25.

About Siebel eLoyalty

Siebel eLoyalty can reduce the workload of your Member Service Representatives. Customers can use Siebel eLoyalty to enroll as members. Members can use Siebel eLoyalty to perform many activities for themselves, rather than calling member service representatives.

This chapter gives you background information about how members use Siebel eLoyalty.

There are no tasks that are specific to working with members who use Siebel eLoyalty. The information that members enter is stored and used in the same way as the information that is entered by member service representatives.

For example, if a member uses eLoyalty to enroll in a program or promotion, the same information is entered in the Siebel database that would be entered if the member telephoned a member service representative to enroll. Thus, you can work with this information as you with any information about members.

Overview of Member Use of Siebel eLoyalty

When non-members go to the eLoyalty URL as anonymous users, they can:

- Register in order to enroll in loyalty programs, either on their own behalf, on behalf of their household, or on behalf of their company.
- View special offers on the eLoyalty home page.
- Browse the product catalog.

When members go to the eLoyalty URL, they can log in and then:

- **View the personalized home page.** This page has links to special offers and to many features of eLoyalty, as well as information about their own membership (their Member #, the programs they are enrolled in, their member level, the date they became a member, their member type, their point balance, and their special status, if any).
- **Enter and edit profile information.** View, enter, and edit information about the member.
- **Buy products.** Browse the product catalog to buy products and see how many points they will earn by buying these products.
- **Redeem points.** Browse the product catalog to buy products by redeeming points that they have already earned.
- **Enroll in programs.** Enroll in additional loyalty programs that they are not yet enrolled in.
- **Enroll in promotions.** Enroll in promotions that require enrollment. Some promotions can be open to all members without enrollment.
- **Refer members.** Recommend someone to become a member.
- **Enter partner memberships.** Add information about their memberships in your partners' loyalty programs.
- **View statements.** Statements include basic information about the member's membership level, how many points they have earned and redeemed during this period links, their account activity and their vouchers, and they also include links to detailed information about the member's:
  - Transactions
  - Vouchers
  - Loans
  - Tier History
  - Tracked Tier Activities
  - Service Requests
  - Orders
  - Saved Carts

Scenario for Member Use of Siebel eLoyalty

This scenario gives one example of how members may use Siebel eLoyalty. Your members may use eLoyalty differently, depending on your business model.

The Member Enrolls and Enters Profile Information

A customer of a supermarket learns that she can get points toward airfare and hotel expenses by being a member of the supermarket's new loyalty program.

The customer goes to the Web site URL that was mentioned in the supermarket's brochure.

The customer looks at the home page, which has more information about the program, and sees that there is a 50 point bonus just for signing up. The customer also clicks the Exclusive Promotions links and sees the details of the special promotions that are available only to members.

The customer decides to join the program and clicks Register Self. The customer fills out and submits profile information. The Web site displays a message saying the customer will receive a confirmation email.

When the email arrives, the customer clicks the link on the email to go to eLoyalty.

After entering the user name and password, the customer can see that the new Loyalty account already has a point balance of 50, which reflects the points received for signing up.

The Member Views Account Information

Occasionally, the member logs into the loyalty Web site to check the status of the account.

The member clicks the Statements link to view a program summary, with the member's points balance, current tier, qualifying points, and points needed to reach the next tier.

The member scrolls down to see the Account Activity list, with details about each of the member's transactions, including what day the transaction occurred, a description of it, how many qualifying points and bonus points the transaction earned, or how many points were redeemed.

The member scrolls down further to see the Vouchers list, with information about each of the member's vouchers.

The Member Signs Up for a Promotion

While looking at the eLoyalty home page, the member clicks the Enroll in Latest Promotions link.

One promotion gives double points for purchases made during the week before Thanksgiving. Since the member is planning to buy groceries that week, the member clicks the Opt In link to sign up for that promotion.

The Member Buys Products

On the home page, the member clicks Buy/Redeem products and receives a list of products that you can buy through the Web site. The member browses through the catalog and sees that you can get bonus points for buying a cloth shopping bag with the supermarket's logo. The member buys this product.

The Member Redeems Points for Rewards

After accumulating points, the member can use the Web site to redeem them for a reward.

On the eLoyalty home page, the member clicks Buy/Redeem products. The member browses a list of reward products that the member is qualified to receive based tier status and available point balance. (Rewards can also be displayed based on geography and other factors.)

The member chooses a $100 discount on hotel accommodations and a free airline ticket. After putting these products in the Shopping Cart, the member completes the order and receives a confirmation number and an explanation of how the order will be fulfilled. The member also receives an email with a summary of the transaction.

The Member Refers a New Member

While traveling, the member tells people about the reward program that is helping to pay for this vacation, and many of them are interested in joining.

The member logs into the Web site, navigates to the Refer a Friend view, and enters the names and email addresses of people who are interested in joining. When any of these people join, the member receives a 100 point bonus for referring a friend.

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