Siebel

Loyalty Administration Guide

January 2020

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Loyalty Administration Guide

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Preface

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

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1 What's New in This Release

What's New in Siebel Loyalty Administration Guide, Siebel CRM 20.1 Update

No new features have been added to this guide for this release. This guide has been updated to reflect only product name changes.

Whats New in Siebel Loyalty Administration Guide, Siebel CRM 19.1 Update

No new features have been added to this guide for this release. This guide has been updated to reflect only product name changes.

2 Overview of Siebel Loyalty

Overview of Siebel Loyalty

This chapter provides an overview of Oracle's Siebel Loyalty. It includes the following topics:

- *About Siebel Loyalty*
- *Roadmap to Working with Siebel Loyalty*

About Siebel Loyalty

Oracle's Siebel Loyalty is a multichannel application that enables companies to create dynamic, cross-industry loyalty programs that drive strategic customer initiatives. Companies can drive desirable member behavior and foster long-term customer loyalty by creating reward programs and promotions. For example, it can be used to create and manage:

- Airlines' frequent flyer programs
- Hotels' frequent guest programs
- Retailers' frequent shopper programs
- Cruise Lines' and Railways' frequent traveler programs
- Telecommunications firms' loyalty programs

Any of these programs can include promotions, which give members extra rewards for specific behavior. For example:

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

Siebel Loyalty Members

The members of programs can be:

- **Individuals.** Each individual has a unique Membership number. Most business-to-consumer programs, such as programs for airlines, hotels, and retailers, enroll individuals as members.
- **Households.** Each household has a unique Membership number. Multiple individuals can be part of the household, and an individual accrues or redeems points through the household's membership For example, a grocery store or retail store might enroll an entire household in a program, so the household gets the bonus no matter which member of the family makes purchases.
- **Accounts.** A company or an organization is the member. The account is generally used for business-to-business loyalty programs. For example, some companies, such as transportation firms, run loyalty programs that only have companies as members, so the company gets the reward whenever any of its employees makes a purchase. Some airlines' frequent flyer programs provide rewards to the individual who flies and to that individual's employer, which is an example of a mixed individual/account loyalty program.

Siebel Loyalty Users

Siebel Loyalty can be used by:

- **Host Organization's Employees.** Sales employees 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. Other employees include administrators that configure server components and engine parameters. In addition, the relationship marketing manager can set up programs, partners, products, and promotions.
- **Partners.** Partners can use the Siebel Loyalty Partner Portal to work with Siebel Loyalty through the Web. If it is appropriate to the business model, then partner companies can deal with members in the same way that the host organization 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. In addition, you can reward partners based on their sales of your products.
- **Customers and Members.** Customers can use Siebel eLoyalty to sign up as members in programs through the Web. Members can use eLoyalty to check their point balances, redeem their points for rewards and perform other activities through your Web site, such as updating profiles, generating statements, referring friends, and logging service requests.

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.

Roadmap to Working with Siebel Loyalty

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

Designing 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 might want to increase the frequency of a customer's interactions, the total dollars spent for each transaction, how often members use the Member portal rather than phoning the call center, or other behavior.

For example, a major airline might 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 frequent flyers, which would increase the frequency of their transactions.

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

Implementing a Loyalty Program

To implement a loyalty program, perform the following tasks:

- **Setting Up Siebel Loyalty.** You must install and configure the product. For more information, see *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 *Setting Up Siebel Loyalty Programs*
- **Setting Up Memberships and Other Loyalty Services.** You must define memberships for various member types and define other loyalty services. For more information, see *Working with Siebel Loyalty Program Members*
- **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 *Setting Up Siebel Loyalty Promotions*

Measuring a Loyalty Program's Results

After a program is in place, you measure its results to see whether 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, then 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? (ROI is defined as the increase in earnings divided by the cost of implementing the program.)

This measurement of the results can help you improve the design of the current program. Like the design phase, the measurement phase can use Oracle Business Intelligence.

3 Getting Started with Siebel Loyalty

Getting Started with Siebel Loyalty

This chapter covers how to set up Siebel Loyalty. It lists the set-up tasks that are specific to Siebel Loyalty, and it must be used in combination with the more general set-up tasks described in *Siebel Applications Administration Guide* . This chapter includes the following topics:

- *About Getting Started with Siebel Loyalty*
- *About Implementing Siebel Open UI*
- *Configuring Siebel Loyalty*
- *Setting Parameters for the Siebel Loyalty Engine*
- *Setting Up Server Components for Siebel Loyalty*
- *Performance Optimization for Siebel Loyalty*
- *Defining Loyalty Products, Price Lists, and Catalogs*
- *Activating Workflows for Siebel Loyalty*
- *Activating Task Flows for Siebel Loyalty*
- *Creating Membership Schemes for Siebel Loyalty*
- *Defining Lists of Values for Siebel Loyalty*
- *Adding Employees as Loyalty Users*
- *Creating the Loyalty Host Company as a Partner*
- *Process of Setting Up Partner Access to Siebel Loyalty*
- *Setting Up Customer Access to Siebel eLoyalty*
- *Viewing Processing Information for Siebel Loyalty Transactions*
- *About Siebel Loyalty and Social Media*

About Getting Started with Siebel Loyalty

Siebel Applications Administration Guide covers the set-up tasks that are common to Siebel Business 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, then see *Siebel Installation Guide* for the operating system you are using in the *Siebel Bookshelf* .

> **Note:** The *Siebel Bookshelf* is available on Oracle Technology Network (http://www.oracle.com/technetwork/indexes/documentation/index.html) and Oracle Software Delivery Cloud. It might also be installed locally on your intranet or on a network location.

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:

- *Setting Up Siebel Loyalty Programs*
- *Setting Up Siebel Loyalty Promotions*

About Implementing Siebel Open UI

You can choose to deploy Siebel Business Applications with the Siebel Open UI user interface framework. Siebel Open UI uses an open architecture that enables you to customize and extend the Siebel user interface for your enterprise.

In the current version of Siebel Loyalty, all Siebel Loyalty functionality is available with Siebel Open UI.

The procedures in this guide assume that you do not use the Tree navigation control option to access screens and views. However, you can choose to use the Tree navigation control if required. For more information about setting navigation options, see *Siebel Fundamentals Guide* .

Configuring 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*
- *Allowing Additional Fields to Control Loyalty Points Given*
- *About Changing the Fields Used in Loyalty Attributes*
- *Allowing Manual Processing of Queued Transactions*
- *Setting Up Points Loan Repayment Workflow*
- *Setting Up Member Merge*
- *Allowing Users to Change Values of Member Attributes*
- *Requiring Approval for Status Changes of Loyalty Transactions*
- *Rounding the Decimal Values of Points*
- *Setting Up Custom Transaction Types for Siebel Loyalty*

Creating Point Types for Loyalty Programs

A point type is a loyalty program's currency. Various point types can be defined to reward and recognize members based on their activities (such as completing a flight or referring a friend to the program). Some point types are defined to allow members to redeem points for a product or service while some are defined to track their behavior and reward them by assigning a new tier status.

Multiple point types can be used in a joint account or an individual account, with one type of points going to individuals and another going to accounts, with different accrual and redemption rules associated with each point type. Multiple point types could also be used to differentiate the value of a purchase from the host company and from a partner. For

example, an airline could say that in order to qualify for Silver Tier status, a member has to earn either 25,000 points flying on the host airline or 35,000 points flying on partner airlines. In this example, points earned flying the host airline would be one point type, and points earned flying on partners would be a second point type.

In addition, a separate point type can be used to track any action that can qualify a member for a tier. For example, if a hotel says that a member can earn Silver Tier status either by earning 10,000 points or staying 35 times, then it is better to use two point types. The first point type is the standard points that can qualify the member for a tier status. The second point type tracks the number of stays, with the member getting one point for each stay; these points cannot be used for redemptions, but they can qualify a member for a tier.

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.

Siebel Loyalty comes with eight point types created in the data model and UI. Once these eight point types are defined, they track the balances of eight different point types for a member. You can also configure the product to create additional point types. You must 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 *Siebel Applications Administration Guide* . For more information about point types, see *Defining Point Types and Subtypes for Loyalty Programs*.

Allowing Additional Fields to Control Loyalty Points Given

Without configuring Siebel Loyalty, you can use the following fields to define how many base points a member receives for an accrual transaction, or how many base points are required to redeem the same product. These fields are available in the Administration - Products screen, Points view:

- Partner
- Departure Airport
- Departure Zone
- Arrival Airport
- Arrival Zone
- Booking Class
- Roundtrip

To use different transaction fields to control base points

1. Create a list of the transaction attributes (fields) that you want to control the base points given, including the potential values for each of the new fields.
2. In Siebel Tools:
   a. Update the two business components with these new fields:
      - Transactions (LOY Transaction)
      - Administration - Product, Points (LOY Product Points)
   b. Make these new fields visible in the user interface in the following places:
      - Member, Transactions
      - Transactions
      - Statement, Transactions
      - Administration - Product, Points

- **Note:** Use Products, Points only if you also want to add it to the read-only Products view.

- Base Points pop-up pick list
- **Note:** This pop-up pick list appears when you click on the Base Points field in the Transactions List. It is used to choose the specific characteristics and point value for the product you already associated with the transaction. You must modify this list by adding the new fields.

c. Modify the query form:

- Currently, Siebel Loyalty displays a query form, the user enters the desired characteristics of the product there, and then Siebel Loyalty displays the Base Points pop-up picklist with the applicable point values.
- **Note:** This step is applicable only if you want to manually pick up a unique product points record in the list applet.

- If you want it to go directly to the Base Points pick list, then clear the Auto Query value (which is currently Query).
- If you want to keep the Query, then update the pop-up query applet (Applet Web Template mode) to include the new fields.

3. In your Siebel Business Application, in the Administration - Data screen, List of Values view, create list of values as needed for each new field.
4. Test to make sure that, when you choose a record in the Base Points pop-up pick list, the values chosen from that list are transferred to the Transaction. For example, if you currently choose a point value with a Booking Class of Y, then the Booking Class is automatically entered as Y on the Transactions List Applet if it is working correctly:

a. Use pick maps to copy the value.
b. The pick map must have these values:

- **Field.** name of the field in the Transaction Business Component.
- **Picklist Field.** name of the Booking Class field in the Product Points Business Component.

c. Specify the values for every field that must be copied from the Product Points Business Component to the Transaction Business Component.

About Changing the Fields Used in Loyalty Attributes

Attributes are used in promotion rules. For more information, see *Creating Attributes for Loyalty Programs*.

Most types of attributes represent fields in records such as the Member record or the Transaction record. The List of Values view of the Administration - Data screen is used to specify the fields within each record that are available for use as attributes.

The following table shows the value of the Type field in the List of Values view that is used to specify the fields that can be used for each type of attribute.

Attribute Type	Value of Type field in LOV Administration
Member Field Attributes	LOY_ATTRIB_FIELDS_MEMBER

Attribute Type	Value of Type field in LOV Administration
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

Note: The values for the Type field outlined in the previous table, and other samples in the topics that follow, are seed data that is supplied with your Siebel Business Application.

You can change the fields that a type of attribute can represent by changing its list of values in the List of Values view. Each entry in the List of Values Administration view must represent an active field in the corresponding business component. For more information about changing lists of values, see *Siebel Applications Administration Guide* .

Allowing Manual Processing of Queued Transactions

Some transactions are created with the status of Acceptable, which means that they are processed when the user clicks the Process button.

Some transactions are created with the status of Queued, which means that they are processed in batch mode by the Siebel Loyalty Engine.

For example, when a member creates a redemption order on the Loyalty eMember Web site, the redemption transaction that it creates to debit the points has a status of Queued, so it cannot be processed manually by clicking the Process button.

The status that the transaction has when it is created depends on the user property OrderToTxn: Transaction Status, which you can modify in Siebel Tools. For more information about Siebel Tools, see *Using Siebel Tools* .

To allow manual processing of transactions

1. In Siebel Tools, find the appropriate business service.

   For example, for customer transactions on the eMember Web site, find LOY Customer Action Business Service.
2. For that business service, find the user property OrderToTxn: Transaction Status.

   Without configuring Siebel Loyalty, the value of the user property is LOY_TXN_CD_STATUS Queued.
3. In the value of the user property, change Queued to Acceptable.

   The transaction is created with a status of Acceptable, so it can be processed manually.

Allowing Transactions to Be Processed Both Manually and Automatically

Without configuring Siebel Loyalty, transactions are processed automatically by the batch engine if their status is Queued, and they are processed manually by clicking the Process button if their status is Acceptable.

The status depends on how the transaction is created. For example, transactions created by the member on the eLoyalty Web site are given a status of Queued, so they are processed automatically by the batch engine.

You can configure the product so users can click the Process button to process transactions whose status is either Queued or Acceptable. Then users do not have to wait for the batch engine to run for Queued transactions to be processed. Users have the option of either waiting for the batch engine or clicking Process to process the transaction immediately.

To configure the product, set the following parameter in the LOY Engine Transaction business component for LOY Queue Manager SearchSpec: Batch:

```
[Status] = LookupValue('LOY_TXN_STATUS_CD','Acceptable') OR [Status] =
 LookupValue('LOY_TXN_STATUS_CD','Queued') AND [Program Active Flag]<>'N'
```

Setting Up Points Loan Repayment Workflow

Your company can, at its discretion, loan points to its members. A loan is provided automatically if a member does not have enough points for a redemption. A loan provided based on the Loan setup at the program level. For details of how a loan is set up, see *Redemption Loans*. To collect repayment of these loans automatically, Siebel Loyalty provides a workflow process named LOY Loan Repayment. To invoke the workflow, you must build a search specification that the workflow takes as its input.

The search specification identifies members who have outstanding points loans and have positive points accruals. The workflow, once activated, runs nightly and performs the following process:

1. **Owes points?** Identifies members who have outstanding points owed.
2. **Accrued points?** Identifies members who have accrued points.
3. **Creates redemption.** For each member where both are true, creates a redemption transaction that debits points from the member and pays them back to your company up to the amount of points owed.

The workflow identifies loaned points that the member owes regardless of whether the member has spent these loaned points. The workflow does not wait till the member has the full amount of points needed to redeem the loan. It can collect loaned points incrementally.

> **Note:** The loan repayment workflow is active only after the member point balance is greater than the loan outstanding balance. The amount of repayment is calculated as (member point balance - sum of remaining loan points).

To set up the search specification for points loan repayment

1. Navigate to the Administration - Server screen.
2. In the link bar, click Jobs.

3. On the Jobs list, create a new record, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Component/Job	Select Workflow Process Batch Manager.

4. In the Job Parameters list at the end of the screen, create a new record, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Name	Select Workflow Process Name.
Value	Enter the name of the workflow the search specification applies to; in this case, LOY Loan Repayment.

5. In the Job Parameters list at the end of the screen, create another new record, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Name	Select Search Specification.
Value	Enter the following string: `[Transaction Sub Type] = LookupValue ('LOY_TXN_SUB_TYPE_CD', 'Loan') AND [Status] = LookupValue('LOY_TXN_STATUS_CD', 'Processed') AND [Current Loan Balance] > 0`

6. Go back to the start of the screen and click Start.

   Each time the component runs, for each applicable member it creates a transaction where the Type is REDEMPTION, Subtype is Loan Repayment, and the value of Points is as many point as the member has available, up to the amount needed to repay the loan.

Setting Up Member Merge

Users can merge the records of two or more members, combining the number of points, the last transaction, and other data for all the members into a single Member record.

You can change the ways that some data is combined by changing user properties in Siebel Tools. For more information, see *Merging Loyalty Program Members*.

Allowing Users to Change Values of Member Attributes

Without configuring Siebel Loyalty, the values of member attributes cannot be changed manually. They can only be changed by the Siebel Loyalty Engine.

You might need to allow manual changes to the values of member attributes. If you do, then it is recommended that you not allow all employees to change these values. Only the managers who need to change the values must be allowed to change them.

You can configure the product so that employees cannot change the member attribute in two ways:

- Create a new view, make it editable, and assign it to the appropriate managers by adding it to their responsibility.
- Make the existing view editable based on the responsibility. You can make a view read-only for certain responsibilities and editable for others.

For information about assigning views to users based on responsibility, see *Siebel Security Guide* .

Requiring Approval for Status Changes of Loyalty Transactions

You can use Siebel Tools to change the user properties that specify whether or not an approval is required for changes in transaction status. If approval is required, then the Approval dialog box appears.

The user properties End Transition x (where x is a number) on the LOY Transaction business component control whether an approval is required for a particular status change, and so control whether the popup window is displayed.

The standard Siebel runtime repository includes the user properties and values shown in the following table.

Property Name	Value
End Transition 1	Acceptable
End Transition 2	Cancelled
End Transition 3	In Progress
End Transition 5	Rejected - Manager
End Transition 6	End

If the value exists in this list, then the approval popup is not displayed.

You can modify these user properties in Siebel Tools. For more information about Siebel Tools, see *Using Siebel Tools* .

Setting Up Custom Transaction Types for Siebel Loyalty

Custom transactions give you the ability to create new types of transactions, as subtypes of the Custom type, that are not available as standard transaction types of Siebel Loyalty.

This feature enables you to create new transaction subtypes of the transaction type Custom for services that are not available as standard Siebel Loyalty transaction types or subtypes, such as duplicate card issue, baggage loss, walk-in fee, and other services for which you can charge members monetary fees, monetary fees and points, or points alone. You can define promotions exclusively for each of these custom transaction subtypes so that the Loyalty engine evaluates only these promotions.

When member service representatives create a custom transaction, they use the following fields:

- **Transaction Type.** The user selects Custom Transaction in the Transaction Type field.
- **Transaction Sub Type.** You can create custom values for the Transaction Sub Type field for the user to select when the type is Custom Transaction. You cannot create custom subtypes for other transaction types.

For more information about how member service representatives create transactions, see *Entering Loyalty Members' Transactions*.

Custom promotions cannot be part of a promotion design. The Assign Points, Update Attribute and Redeem Points actions are supported for Custom promotions.

To set up custom transactions, the Loyalty Administrator must do the following:

- Define the product used by the custom transaction in a similar way that you would define an accrual or redemption product. You can define a single product for all custom transactions or different products for different varieties of custom transactions. The transaction type field in the Points tab for the product must be Custom. A partner product offering is not required for custom transactions. For more information about defining products, see *Defining Loyalty Products, Price Lists, and Catalogs*.
- Create a transaction subtype to be selected by the member service representative. This is created in the Administration - Data screen, List of Values view by adding records with the Type LOY_TXN_SUB_TYPE_CD, as described in the following procedure.
- Create a promotion to perform the actions needed for this custom transaction. In the Apply To field in the Promotion list, select Custom. Create rules with the criteria that check the value in the Transaction Sub Type field of the transaction and that execute the actions for this custom transaction if it is the appropriate subtype; in the Apply to field of the rules, select Transaction. For more information about creating promotions, see *Setting Up Siebel Loyalty Promotions*

Defining Custom Transaction Subtypes

Use this procedure to define custom transaction subtypes.

> **Note:** The transaction type LOY_TXN_TYPE_CD and the promotion subtype LOY_PROMOTION_SUB_TYPE with the value Custom are included in the seed data.

To define custom transaction subtypes

1. Navigate to the Administration - Data screen, then the List of Values view.
2. Add new records of this type and complete the necessary fields. There must be one record for each of the display values that you want for subtypes. Some fields are described in the following table.

Field	Description
Type	Enter LOY_TXN_SUB_TYPE_CD.
Display Value	Enter a value to be displayed in the subtypes picklist when the transaction is created.
Parent LIC	Select CUSTOM.

3. Click Clear Cache.

   Note: New values do not go into effect unless you click Clear Cache.

Example of Creating a Custom Transaction

This topic gives one example of creating custom transactions. You might use this feature differently, depending on your business model.

The Loyalty administrator wants to create a custom transaction type for duplicate card issue, which gives members discounts based on their tier. Bronze members are not eligible for any discount, silver members are eligible for a 25% discount, gold members are eligible for 50% discount, and platinum members get the service at no cost.

To do this:

- The Loyalty administrator uses the Administration Product screen to add a product, and select Custom as the product type in the Points view for that product. The product might be named Custom Services if it is a generic product to be used by all custom transactions, or it might be named Duplicate Card if it is a product to be used specifically for this custom service.
- The Loyalty administrator creates a new custom transaction subtype by adding a record in the Administration - Data screen, List of Values view with the values shown in the following table.

Field	Value
Type	LOY_TXN_SUB_TYPE_CD
Display Value	Duplicate Card Issue
Parent LIC	CUSTOM

- The Loyalty administrator writes a promotion with Custom selected in the Apply To field. This promotion has rules that check the value in the transaction's subtype field to see that it is Duplicate Card Issue, calculate the fee with the appropriate discount for the tier that the member is in, and charge the member the appropriate fee for issuing a duplicate card.
- After this setup is complete, member service representatives can create transactions and selects Custom in the Type field and Duplicate Card Issue in the Sub type field, and the promotion charges the member the appropriate fee.

For example, a silver member telephones the call center and asks for a duplicate card. The member service representative creates a transaction, selects Custom in the Type field and selects Duplicate Card Issue in the Sub Type field. The promotion is executed and charges the member a fee that is discounted 25% from the full price of getting a duplicate card.

Rounding the Decimal Values of Points

By default, decimal values of points are rounded to the nearest integer. Points are rounded as followed:

- **Accrual Items.** The number of points accrued for a transaction are rounded to the nearest integer. If the decimal value is greater than or equal to .5, then it is rounded to the next highest integer. If it is less than .5, then it is rounded to the lower integer.
- **Product Points.** The point values entered for redemption or accrual when you define a product can only be integers.
- **Base points.** If base points are used to calculate the final number of points rewarded for a transaction, then the base points are calculated to 2 decimal places but the final number of points accrued for the transaction is rounded to the nearest integer.
- **Promotions.** If points are assigned using the Assign Points action of a promotion, then you can use decimal values in setting up the action for the promotion, but the final number of points accrued is rounded to the nearest integer.
- **Redemption.** Any decimal values for redemption items that are calculated by promotions are rounded off to the nearest integer.
- **Member Balance.** Because it depends on the integer values described in all the preceding bullets, the member balance is always as integer.
- **Partner Point Block.** The definition of Partner Account Debit (PAD) allows decimal values, so the partner's point block can have decimal values deducted. For example, if a member is awarded 545 points and PAD is .1, then 54.5 is deducted from the partner block. For more information about the PAD, see *Setting Up Unified Point Type for Partner Account Debit*.

Configuring the Rounding of Decimal Values of Points

You can configure the number of decimal places used for rounding points. This configuration applies to:

- Accrual items, which reward the member in decimal points based on the configuration.
- Point block debits, which subtract decimal values from the point block and leave a decimal balance in the point block.
- Actions that use points, including Assign Points, Redeem Points, Purchase Points, Transfer Points, Reactivate Points, Transaction Cancellation.
- Member services that use points, including Purchase Points, Transfer Points, Points Reactivation, Gift Points, Manual Credit and Manual Debit.
- Redemptions, which consume points including decimal values. However, the total number of points needed to redeem a product must be defined in the Products screen as an integer value and cannot use decimal values.
- Accrual and redemption cancellation, which revert points using the same decimal precision with which they were rewarded or redeemed in the transaction being cancelled.

You can also override rounding for qualifying points. If you configure rounding so points are rounded to one to seven decimal places, then you can override this setting for qualifying points, so they are still rounded to the nearest integer.

To configure rounding, use the following user properties of the Business Service LOY Processing Engine:

- **Points Precision**. This user property controls the number of decimal places to which the points are rounded. The default value is 0, which means that the points are rounded to an integer value. Valid values are any integer greater than or equal to 0 and less than or equal to 7. For example, the Assign Points action does a calculation that provides a reward of 1.345714932 points. Then:
  - If the Points Precision user property has the default value of zero, then this reward is rounded to the nearest integer, in this case, 1 point.
  - If the Points Precision user property is set to one, then this reward is rounded to 1.3 points.
  - If the Points Precision user property is set to seven, then this reward is rounded to 1.3457149 points.
- **Points Precision Override for QF**. This user property allows you to round off qualifying points to integers, even if you have used the Points Precision user property to round off points to a decimal value. To override the Points Precision user property for qualifying points, set this user property to Y. If this user property is not defined or is set to N, then qualifying points will be rounded in the same way as other points, based on the Points Precision user property.

If any other feature except for qualifying points requires that you override the rounding and use integer points, then you can control the input at the user interface level. Allow the user to enter only integer values in the appropriate fields by changing the data type of these fields in the business component to integer.

Examples of How the Decimal Values for Points are Rounded

Rounding of decimal points for a transaction occurs for each individual accrual line item generated by a transaction. For example, if a member's transaction qualifies for points as a result of two separate promotions, two accrual line items are created. The points assigned for each accrual generated by each promotion are rounded, then the values are combined to determine the total points the member receives. The following are some examples of how rounding occurs where a transaction qualifies for two promotions and where the Points Precision value is set to two, so points are rounded to two decimal points:

- If a transaction qualifies for two promotions, each of which generate 20.158 transaction points, two accrual line item are created, each with an accrual value of 20.16. The total points assigned to the customer is 40.32 (20.16 plus 20.16 from each of the accrual items).
- If a transaction qualifies for two promotions, each of which generate 20.987 transaction points, two accrual line items are created, each with an accrual value of 20.99. The total points assigned to the customer is 41.98 (20.99 plus 20.99 from each of the accrual items).

Setting Parameters for the Siebel Loyalty Engine

You can customize the following Siebel Loyalty Engine parameters:

- LOYEngineNumberOfRuns
- LOYEngineQueueObjects
- LOYEngineSleepTime

All these parameters apply to the eLoyalty Processing Engine – Batch component. They affect batch processing, not real-time processing. For a description of these parameters, see *Configuring Parameters of the Batch Server Component*.

Parameters are commonly used in the following ways:

- *Specifying Objects Processed by the Siebel Loyalty Engine*
- *Specifying How Often the Siebel Loyalty Objects Run*

You can also set parameters to determine how often statements are produced for each tier of a program by using the Statement Frequency and Only If Activity fields of the Program screen, Tier Class, Tiers view. For more information, see *Defining Tier Classes and Tiers*.

Specifying Objects Processed by the Siebel Loyalty Engine

You can specify which objects the Siebel Loyalty Engine processes by using the parameter LOYEngineQueueObjects.

The following table lists the types of objects that the Siebel Loyalty Engine processes.

Type	Business Object and Primary Business Component	Description
Transaction	LOY Transaction Processor LOY Engine Transaction	Processes the transaction for any qualified promotions. Processed against the active promotions in the program.
Tier	LOY Tier Processor LOY Engine Member Tier	Processes the member tiers for change such as Upgrade, Downgrade. Processed only against one promotion of that tier.
Bucket	LOY Promotion Bucket Processor LOY Promotion Bucket	Processes the Promotion Bucket to check whether it has met all the criteria of a complex promotion. Processed only against the promotion in question.
Accrual	LOY Accrual Expiration Processor LOY Member Accrual Item	Processes the accruals that have expired and deducts the points from the member's balance. There are no promotions involved and only redemptions are created for all expired accruals and member balances are deducted accordingly.
Document	LOY Statement LOY Statement	Processes the statements with an In Progress status and generates a document and sets the status to Completed. The file name points to the generated document.

Specifying How Often the Siebel Loyalty Objects Run

You can set parameters to specify how often the Siebel Loyalty objects run. For example, objects can run weekly, daily, or hourly. This setting applies to Siebel Loyalty objects, not to individual programs.

For example, to specify how often the Siebel Loyalty objects run, set the following parameters for the batch component eLoyalty Processing Engine – Batch (alias LoyEngineBatch):

- LOYEngineQueueObjects set to Transaction:30,Bucket:10,Tier:30. This setting determines how often transactions, bucket and tier objects are run.
- LOYEngineNumberOfRuns set to -1.

You can also set parameters to specify how often the Siebel Loyalty points expiration engine runs. For example, it can run weekly, daily, or hourly. This setting applies to Siebel Loyalty, not to individual programs.

To specify how often the Siebel Loyalty points expiration engine runs, set the following parameters for the batch component eLoyalty Processing Engine – Batch (alias LoyEngineBatch):

- LOYEngineQueueObjects set to Transaction:30,Accrual:10,Tier:30.
- LOYEngineNumberOfRuns set to -1

Setting Up Server Components for Siebel Loyalty

There are three Siebel Enterprise server components defined for the Siebel Loyalty Engine:

- **eLoyalty Processing 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 and exits when done.
- **eLoyalty Processing 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.
- **eLoyalty Processing Engine - Interactive.** Processing is routed dynamically based on available processes and loads.

All Siebel Loyalty Engine server components in a Siebel Enterprise can access updated cache information during Siebel Loyalty transaction processing, even if the components are running on different Siebel Servers. The Siebel Loyalty cache object contains all the active programs and promotions that are required for processing transactions. Because updated cache data is available on all servers running Siebel Loyalty Engine components, you can implement multiple instances of the real-time server component, running on different Siebel Servers, in a Siebel Enterprise.

Depending on the version of Siebel CRM that you are using, you can optionally copy the Loyalty Batch Engine to create a second batch engine component. For information on how to copy the Loyalty Batch Engine, and the requirements for doing so, see 1609676.1 (Article ID) on My Oracle Support.

The following topics provide information about setting up each of the server components for the Siebel Loyalty Engine:

- *Setting Up the Real-Time Server Component*
- *Setting Up the Batch Server Component*
- *Setting Up the Interactive Server Component*

For additional information about the architecture of the Siebel Loyalty server components, see *Siebel Loyalty Engine Reference*

Setting Up the Real-Time Server Component

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

Note: If your company has multiple Siebel Business Applications installed, then these parameter settings only affect Siebel Loyalty, and not any of the other applications.

Setting Parameters of the Real-Time Component

To configure parameters for the Loyalty Engine real-time component, perform the steps in the following procedure.

To set parameters for the Loyalty Engine real-time component

1. Navigate to Administration - Server Configuration, Enterprises, then the Component Definitions view.
2. Query for the eLoyalty Processing Engine - Realtime component.
3. In the Component Parameters view, specify values for the parameters shown in the following table.

Parameter	Value
Maximum Tasks	This parameter determines the maximum number of tasks the component can run. Set its value based on the number of users who use real-time processing through the user interface.
Minimum MT Servers Maximum MT Servers	Set the value of both of these parameters to one. For more information about these parameters, see *Siebel System Administration Guide* .

Configuring the Processing Mode of the Real-Time Component

When the user clicks the Process button, the real-time 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 whether 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 must use asynchronous mode if there are thousands of users all using real time processing, which is not common.

In a typical deployment, real-time processing is not used heavily, so Siebel Loyalty runs in synchronous mode by default. The following procedure describes how to configure the processing mode.

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 Loyalty Engine batch component, you can configure its parameters and you can set up a workflow to start this component when the server starts. This topic describes these tasks. For information about the architecture of the Siebel Loyalty Engine batch server component, see *Siebel Loyalty Engine Reference*

Configuring Parameters of the Batch Server Component

You can configure the batch server component by changing the parameters that are used in processing, as described in the following procedure.

To configure parameters for the Loyalty Engine batch server component

1. Navigate to Administration - Server Configuration, Enterprises, then the Component Definitions view.
2. Query for the eLoyalty Processing Engine - Batch component.
3. In the Component Parameters view, specify values for the parameters used in batch processing, which are summarized in the following table. All of the parameters in this table apply only to the Siebel Enterprise eLoyalty Processing Engine - Batch component.

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 must have the value -1 or greater than 0. If -1, then the eLoyalty engine keeps running indefinitely until it is shut down. Otherwise, it queries the specified number of times after the current query has run out of records.
LOYEngineNumberOfTasks	LOY - Engine Number of Tasks	0	The number of processing threads that are automatically started when the Loyalty Engine server component is started. By default, it is 0, which means that there is no processing thread started, but there is one queue manager thread started. If -1, then no queue manager thread can be started either. If 4, then 4 processing threads plus one queue manager thread can be started for each MT server.

Name	Display Name	Default Value	Description
LOYEngineQueueObjects	LOY - Engine Queue Objects	Transactions:90 Buckets:10 Tier:10 Accrual: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 eLoyalty engine must wait after it has processed the records and there are no more records in the next query. After sleeping for that time, the eLoyalty engine can requery.

About 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 to initialize the server.

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 causes unnecessary paging and using too few threads causes slow processing. It is best to use two or three threads for each 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*.

Starting the Batch Server Component Manually

The following procedure describes how to start the batch server component manually.

To start the server component manually

1. Be sure that the component parameters MinMTServers and MaxMTServers are set to the number of processes desired on each server.

   For more information about these parameters, see *Siebel System Administration Guide* .
2. For each server:

a. Calculate (number of processes on server) x (1 plus number of Processing Threads/Process)
b. Submit this number of component requests for the eLoyalty Processing Engine - Batch component.
You can submit these component requests from the user interface or using the server manager program.

Starting the Batch Server Component Using a Workflow

The following procedure describes how to use a workflow to initialize the server component.

Note: Before using a workflow to initialize the server, you must set up the workflow so it runs whenever you start the server. For more information about setting up workflows, see *Siebel Business Process Framework: Workflow Guide* .

To use a workflow to initialize the server component

1. In Siebel Tools, set up the workflow LOY Engine - Start Engine workflow by specifying the following two process properties:
   - NumberOfProcesses
   - NumberOfProcessingThreadsPerProcess
2. Activate this workflow.
   When you start the server component eLoyalty Process Engine - Batch, this workflow submits the component requests to start the required number of processes.

Setting Up the Interactive Server Component

The interactive component is used for handling real-time simulation calls and also for processing low-volume accrual imports from an external system. You can modify the interactive component parameters described in the following procedure to optimize load balancing:

To set parameters for the Loyalty Engine interactive component

1. Navigate to Administration - Server Configuration, Enterprises, then the Component Definitions view.
2. Query for the eLoyalty Processing Engine - Interactive component.
3. In the Component Parameters view, specify values for the parameters shown in the following table.

Parameter	Value
Maximum Tasks	This parameter determines the maximum number of tasks the component can run. Set its value based on the number of users who use real-time processing through the user interface.
Minimum MT Servers Maximum MT Servers	Set the value of these two parameters to one. This value is required because only one process must be running for the interactive component in the enterprise. For more information about these parameters, see *Siebel System Administration Guide* .

The interactive processing component runs in the address space of the Siebel EAI Application Object Manager process when processing Web services, instead of in its own address space. As a result, you do not have to start the Loyalty Engine interactive component to enable Siebel Loyalty Web services processing.

Performance Optimization for Siebel Loyalty

The following topics discuss how to optimize performance of Siebel Loyalty:

- *Setting Up Server Keys for Siebel Loyalty*
- *About Assigning Server Keys to Members*
- *Optimizing Point Block Updates*

Setting Up Server Keys for Siebel Loyalty

Server keys are used for batch components, not for real-time components. For more information about batch and real-time components, see *Setting Up Server Components for Siebel Loyalty*.

Server keys are used for two reasons:

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

Siebel Loyalty automatically assigns the least-loaded key to new members.

Using Server Keys for Load Balancing

The number of different keys you 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 transactions. You have two servers available that can each 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 the following table.

Key	Server	Process Number
Key 1	siebelserver1	1
Key 2	siebelserver1	2

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

However, if you create only five keys, then the administrator cannot 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, then the administrator can reassign one or more keys from that process to other processes.

Setting Up the Server Keys

The following procedure describes how to set up server keys.

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	Description
Key	Enter a name for the server key.
Server Name	Enter the name of the server that processes members who have this key.
Process Number (#)	Enter the process number for this server that processes members who have this key.
Number (#) of Members Assigned	Displays the number of members assigned to this key.

Balancing Server Loads

The following procedure describes how to balance the load on servers.

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 overloaded server processes.

About Assigning Server Keys to Members

Without configuring Siebel Loyalty, the Siebel Loyalty application automatically assigns keys to new members based on which key is the least loaded. The least loaded key is determined based on the number of members currently assigned to the key. This field that is maintained in the Server Key Map table by Siebel Loyalty and is not editable.

You can control the logic used to generate keys by changing the user properties listed in the following table.

Business Component	User Property Name	Description
LOY Member	Auto Generate Key Flag	Y or N to indicate if the key must be automatically generated. If not defined, then defaults to Y.
LOY Server Key Map	Auto Generate Key SearchSpec Search	Search specification for keys to consider for assignment. Customer can specify a search specification such as `[Number of Members] < 100000` to only use keys that are not yet fully loaded.
LOY Server Key Map	Auto Generate Key SortSpec	Sort specification to determine the least loaded key. The first key in the sort sequence is assigned to the next member. Without configuring Siebel Loyalty, it sorts in ascending order based on the Number of Members field.

Optimizing Point Block Updates

For Assign Points actions, the points are associated with point blocks. A point block is a set of points assigned to the host company or a partner. Point blocks determine if a host company or partner can give reward points to members. Typically, there is one point block for the host and also one point block for each partner. In other words, the number of point block records is small.

This fact means that in a deployment that has multiple processes running on multiple servers, all threads that process transactions update one or a few records, slowing the performance and limiting the scalability of the Siebel Loyalty Engine.

Two system preferences are available to solve this issue and optimize performance. By default, these system preferences are not defined and do not take effect.

This optimization is available only for the batch mode components. It is not applicable to the real-time components.

> **Note:** Point blocks for the server process are automatically created by the batch processing engine when you optimize performance in order to minimize the number of updates to point blocks during Loyalty Batch Engine processing.

To optimize point block updates

1. Navigate to the Administration - Application screen, System Preferences view.

2. Enter a value for one or both of the two system preferences described in the following table.

System Preference	Description
LOYPointBlockBatchSize	If specified, then this value must be a number greater than 0. It indicates that the Siebel Loyalty Engine must batch the point block updates and apply it to the point block only after this many transactions have been processed.
LOYPointBlockBatchPercent	If specified, then this value must be a number greater than 0 and less than 100. As the available balance in the point block record becomes low, batching the updates can result in more points being assigned to members than are actually available. In order to prevent this problem, this value effectively turns off the batching for the point block records whose remaining balance is less than the specified percentage value. For other point block records, it uses the batching mechanism.

Example of Optimizing Point Block Updates

Suppose 10,000 transactions are being processed, each generating 10 points, and there is a point block of 100,000 points.

If these system preferences are not specified, then the point block record updates 10,000 times, slowing performance.

As an example, suppose the Siebel Loyalty preferences are set to:

- LOYPointBlockBatchSize set to 50
- LOYPointBlockBatchPercent set to 2

For the first 9,800 transactions (100 minus 2 equals 98%), the Siebel Loyalty Engine batches the updates and only applies updates after every 50 transactions, resulting in 196 updates (9,800/50) instead of 9,800. This setting reduces the processing load for 98% of the transactions.

From the next transaction onwards the point block would have less than 2% remaining balance and so the batching would be disabled resulting in 200 updates.

The total number of updates done would be 396 (196 plus 200), as compared to 10,000 without these parameters. There might be contention during processing of the final 200 transactions, but it could happen for only 2% of the transactions.

After this point block has been used, the next point block has a 100% balance to start with and is used with the optimization until it reaches a less than 2% balance.

Server Process Termination and Recovery with Optimization

As the Siebel Loyalty Engine processes the batch of 50 transactions, it stores the information about the pending updates in the database in special system records (and not in memory). One system record is created for each point block by each server process as it uses the original point block record.

After every 50 transactions, the used amount from the Siebel Loyalty record is added to the parent record used amount and is reset to zero for the system record. This process is called point block synchronization. Synchronization is also done in the following conditions:

- If the Siebel Loyalty Engine crashes or the server is brought down abruptly, then no information is lost. The next time the Siebel Loyalty Engine starts, the synchronization is done again.

- If the Siebel Loyalty Engine is terminating normally, then the engine does the synchronization before exiting. So, all system point block records have used an amount of 0. (Note that these records are not visible in the user interface).
- If the Siebel Loyalty Engine is running in a continuous mode (LOYEngineNumberOfRuns equals -1) and there are no more transactions to process and the Siebel Loyalty Engine is going to sleep.

Types of Point Blocks

There are the following types of point block:

- **Program.** Point blocks of the Program type are created when you create point blocks for programs. For more information, see *Creating Point Blocks for Loyalty Programs*.
- **Promotion.** Point blocks of the Promotion type are created when you create point blocks for promotions. For more information, see *Providing Point Blocks for Loyalty Promotions*.

The type of the promotion is visible in the Type field which is based on the BLCK_TYPE_CD column of the LOY Point Block business component.

Defining Loyalty Products, Price Lists, and Catalogs

Any item that can give a member points or that a member can use points to purchase must be defined as a product. This topic only covers Loyalty features of product administration, which must be used together with the other features of the Administration - Product screen when you define products. For information about setting up products, see *Siebel Product Administration Guide* .

You must define pricing for products. For information about setting up pricing for products, see *Siebel Pricing Administration Guide* .

After defining the products and their prices, 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. For more information about creating catalogs, see *Siebel Order Management Guide* .

In some cases, you must define some items as products that are not normally thought of as products:

- If you create action-based bonuses that give members points for enrolling in a program, then you must create a product to be associated with this accrual transaction. For more information, see *Example of Creating an Action-Based Bonus*.
- If a member can purchase points with currency, then you must create products to enable this functionality. For example, if members can purchase points in blocks of 1,000, 3,000 and 5,000, then three products would be created. Each product, when purchased with currency, would credit the member with the respective number of points.
- Airline companies define every possible Airport Code pair as a separate product. Each of these pairs must have a base price defined in a price list. Each pair can also have discounts, defined in Siebel Pricer. For information about defining airport codes, see *Defining Loyalty Airport and City Codes*.

Defining Loyalty Features of Products

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

These fields control:

- How many points a member earns for purchasing a product. For more information, see *Defining Loyalty Points Earned for Purchasing Products*
- How many points are required to redeem a product. For more information, see *Setting Up Products for Redemption by Siebel Loyalty*

Defining Loyalty Points Earned for Purchasing Products

Use the following procedure to define Loyalty points earned for purchasing products.

To define loyalty points earned for purchasing products

1. Navigate to the Administration - Product screen.
2. Add a new record to the Products list, and complete the necessary fields. Some fields are described in the following table.
3. In the expanded main form for the product, complete the necessary fields, described in the following table.

Field	Description
From Airport To Airport	Airline companies use these two fields to define every possible Airport Code pair as a separate product.
Actual Distance Distance UoM	Airline companies use these two fields to define the distance traveled for every possible Airport Code pair.
Suggested Accrual Points	Enter a suggestion for 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. **Note:** This field and the fields that follow allow you to suggest values if you cannot actually create the values. For example, a partner could use these fields to suggest values in cases where only an employee of the host company could actually enter the values. Actual values must be entered in Administration - Product > Points view or in the price list.
Suggested Accrual Point Type	Select a suggestion for the type of point the member accrues by purchasing this product.
Suggested Accrual Price	Enter a suggested price for the points accrued by purchasing this product.
Suggested Redemption Points	Enter the suggested number of points the member must redeem to receive this product.

Field	Description
Suggested Redemption Point Type	Enter the suggested point type the member must redeem to receive this product.
Suggested Redemption Price	Enter a suggested price for the points used to redeem this product.

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

   Note: When you create price lists, enter the host company and all of the partner companies in the price list's Organization field.

5. Create product catalogs, as described in *Siebel Order Management Guide* .

Setting Up Products for Redemption by Siebel Loyalty

To allow members to obtain products, you must set up the product to allow the redemption of loyalty points, or a combination of loyalty points and currency (Points plus Pay). In the product record, you must specify how much the product is worth in points, or a combination of points and currency.

To set up products so members can pay for products with a combination of points and currency, in the product record, you specify:

- How many points the product is worth
- How much money each point is worth

In a sales transaction for that product, when you specify a number of points that is less than the total points needed to redeem the product, Siebel Loyalty uses the following formula to calculate how much money is needed to complete the purchase:

```
[Member's Price] = [List Price] - ([Cost Per Point] * [Points to Use])
```

CAUTION: You cannot use pricing models or pricing factors to price products that members get by redeeming loyalty points.

To set up products for payment with multiple modes (either points, or a combination of points plus pay) see the information on the Payment Mode field in the following topics:

- For airline products, see *Defining the Static Redemption Price for Flight Products*.
- For nonairline products, see *Defining the Static Redemption Price for Nonflight Products*.

For both airline and nonairline products, you can set prices in: Points, Points by Distance, or Points by Zone. You can use different currencies when you set up the pay component of when you set up the points and pay combination.

The following procedure shows how to set up a simple nonairline product for redemption with Loyalty points.

To set up a product for redemption with Loyalty points

1. Navigate to the Administration - Product screen.
2. In the link bar, select Product Catalog.

3. In the Catalogs list, identify the catalog that contains the product.
4. Click the hyperlink in the catalog's Name field.

   Siebel Loyalty displays the Categories list with categories that group the products in the catalog.
5. Select the category to which the desired product belongs.
6. At the end of the screen, make sure the Categories view tab is selected and click Products in the link bar.
7. Find the product in the list and click the hyperlink in its Product Name field.
8. At the end of the screen, make sure the More Info view tab is selected and click Points in the link bar.
9. In the list that appears, find the redemption transaction you want to set up, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Points	Enter the total number of points needed to cover the redemption in full.
Cost Per Point	(Optional) If you want to allow the product to be redeemed for a combination of points and currency, then enter the amount of money assigned as the cash value of one point. This field is used for points-to-pay conversion cases. For example, when a user tries to redeem more points than the user actually has, the insufficient points are converted to a currency based on the Cost Per Point and Currency specified. The points-to-pay conversion option is one-time option that you can choose while setting up a Loyalty program.

For more information on product redemption, see *Setting Up Siebel Loyalty Redemptions* For more information about setting up products, see the chapter on basic product administration in *Siebel Product Administration Guide* .

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.

Activating these workflows makes these features available in the partner application and the member application (eLoyalty), as well as in the employee application.

For information about activating workflows, see *Siebel Business Process Framework: Workflow Guide* .

Activating Task Flows for Siebel Loyalty

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

Before using Siebel Loyalty, you must first publish these task flows. Once the task flows are published, then you must activate the task flows. Activating these task flows makes these features available in the employee application. Task flows are not supported in the partner application and the member application (eLoyalty).

For information about publishing and activating task flows, see *Siebel Business Process Framework: Task UI Guide* .

Creating Membership Schemes for Siebel Loyalty

To enroll a new member in a loyalty program, the member service representative must select a member type and membership scheme. For more information about member types, see *Enrolling Members in Loyalty Programs*.

You create membership schemes while setting up Siebel Loyalty.

The membership schemes are modeled as products, with additional fields added to the Product record indicating the following:

- **Type of Loyalty membership.** In the Product Type field, choose Individual Membership, Account Membership, or Household Membership to specify that this is a Loyalty membership product and to specify the type of membership that it is.
- **Duration of membership.** Use the Duration and Period Type fields to indicate the duration of the membership. For example, if you enter 2 in the Duration field and select Years in the Period Type field, then the membership lasts for two years. Period Type options are Months, Years, Lifetime, or Corp-aligned:
    - If Lifetime is selected, then the membership does not require renewal, and you do not enter a Duration.
    - The Corp-aligned option is available only for Individual members, to align their individual membership with their corporation's membership.

To create a membership scheme

1. Navigate to the Administration Products screen, then the Products view.
2. Create a new product record, then enter a unique name for the product in the Name field.
3. Save the record.
4. Drill down on the Name field of the new product record.
5. Click More Info, then select the Loyalty Product Attributes view tab and complete the necessary fields. Some fields are described in the following table.

Field	Description
Period Type	Choose Months, Years, Lifetime, or, for Individual Memberships only, Corporate-aligned.
Duration	For a period type of months or years, enter the number of units of the chosen period type.

6. In the Product Type field, choose Individual Membership, Account Membership, or Household Membership.

Defining Lists of Values for Siebel Loyalty

When employees work with loyalty program members, they choose information from many drop-down lists of values. You can customize these lists of values to suit your business model. The following topics describe how to define the lists of values that are most commonly customized:

- *Defining Loyalty Membership Card Types*
- *Defining Loyalty Member Groups*
- *Defining Loyalty Member Classes*
- *Defining Loyalty Member Phases*
- *Defining Loyalty Member Statuses*
- *Defining Loyalty Member Hobbies and Preferences*
- *Defining Loyalty Lounges*
- *Defining Loyalty Airport and City Codes*
- *Defining the Distance Between Two Airports*
- *Defining Loyalty Reason Codes*
- *Defining Loyalty Social Media Channels*

For another task that involves defining a list of values, see *Setting Up Custom Transaction Types for Siebel Loyalty*.

Defining Loyalty Membership Card Types

Before you define the tiers for specific loyalty programs, you must define membership card types, so you can select the appropriate membership card type for each tier. Typical values are Platinum, Gold, and Silver membership cards, which would be selected for the Platinum, Gold, and Silver tiers.

To define membership card types

1. Navigate to the Administration - Data screen, List of Values view.
2. 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	Description
Type	Enter LOY_MEMBER_CARD_TYPE.
Display Value	Enter the name of the card type. This name is displayed in the list of values for this membership card type.
Language-Independent Code	Enter the Language Independent Code for the card type.
Language Name	Enter the language that the display value is displayed in.

Defining Loyalty Member Groups

The Member Group picklist is used for grouping members. Typical values can be Domestic Leisure Traveler, International Leisure Traveler, Frequent Business Traveler, and Infrequent Business Traveler.

To define groups

1. Navigate to the Administration - Data screen, List of Values view.
2. Query for the Type LOY_MEM_GRP.
3. Edit the records of this type so there is one record with each of the display values that you want for member groups.
4. Click Clear Cache.

> **Note:** New values do not go into effect unless you click Clear Cache.

Defining Loyalty Member Classes

The Member Class picklist is used for classifying members. Typical values can be Agency, Customer, Salesperson.

To define Loyalty classes

1. Navigate to the Administration - Data screen, List of Values view.
2. Query for the Type LOY_MEM_CLASS.
3. Edit the records of this type so there is one record with each of the display values that you want for member classes.
4. Click Clear Cache.

> **Note:** New values do not go into effect unless you click Clear Cache.

Defining Loyalty Member Phases

The Member Phase picklist is used for specifying phases of member types. Typical values are Gold - Phase 1, Gold - Phase 2, Platinum - Phase 1, and Platinum - Phase 2.

To define Loyalty phases

1. Navigate to the Administration - Data screen, List of Values view.
2. Query for the Type LOY_MEM_PHASE.
3. Edit the records of this type so there is one record with each of the display values that you want for member phases.
4. Click Clear Cache.

> **Note:** New values do not go into effect unless you click Clear Cache.

Defining Loyalty Member Statuses

The Member Status picklist is used for creating user defined member statuses that can be used to apply member restrictions. For example, you could create a new status, “Expired-in grace period", and use this status to restrict a member from redeeming points.

To define member statuses

1. Navigate to the Administration - Data screen, List of Values view.
2. Query for the Type LOY_MEMBER_STATUS.
3. Edit the records of this type so there is one record with each of the display values that you want for member statuses.
4. Click Clear Cache.

> **Note:** Add a link to Restricting based on status at the program level. New values do not go into effect unless you click Clear Cache.

Defining Loyalty Member Hobbies and Preferences

There are member picklists used to specify preferences for individual members, including hobbies, favorite travel destinations, and frequently travelled routes. These can be used to identify members who are good target candidates for specific promotions.

The Hobbies picklist is used to associate hobbies and interests with members. For example, you could record which members are interested in golf and tennis.

Defining Member Hobbies

The following procedure describes how to define member hobbies.

To define member hobbies

1. Navigate to the Administration - Data screen, List of Values view.
2. Query for the Type LOY_ATTRIB_FIELDS_MEMBER.
3. Edit the records of this type so there is one record with each of the display values that you want for member statuses.
4. Click Clear Cache.

> **Note:** New values do not go into effect unless you click Clear Cache.

Defining Member Travel Preferences

The travel preferences are used to record members’ favorite travel destinations and frequently travelled routes. The following procedure describes how to define member hobbies.

To define member travel preferences

1. Navigate to the Administration - Data screen, List of Values view.

2. Query for the Type LOY_TRVL_PREF.
3. Edit the records of this type so there is one record with each of the display values that you want for member statuses.
4. Click Clear Cache.

> **Note:** New values do not go into effect unless you click Clear Cache.

Defining Loyalty Lounges

The Lounge picklist is used for specifying the lounges that members can use. For example, Platinum members can be allowed to use special lounges.

To define loyalty lounges

1. Navigate to the Administration - Data screen, List of Values view.
2. Query for the Type LOY_LOUNGE_CD.
3. Edit the records of this type so there is one record with each of the display values that you want for lounges.
4. Click Clear Cache.

> **Note:** New values do not go into effect unless you click Clear Cache.

Defining Loyalty Airport and City Codes

Airline companies must define airport codes for all airports that flights arrive at and depart from. You can select these codes in the From Airport and To Airport drop-down lists when you define products.

Optionally, airline companies can define codes for cities, so they can create promotions based on flights between cities, not just based on flights between individual airports. To create promotions based on flights between cities, after creating the city codes, you must map them to airport codes at the program level; you can also map zones to the airport codes, as described in *Mapping Zones and Cities to Airports*.

Defining Airport Codes

The following procedure describes how to define airport codes.

To define airport codes

1. Navigate to the Administration - Data screen, List of Values view.
2. Query for the Type LOY_AIRPORT_CODE_CD.
3. Add one record with this Type value for each airport your flights arrive at or depart from.
4. Click Clear Cache.

> **Note:** New values do not go into effect unless you click Clear Cache.

Defining City Codes

The following procedure describes how to define city codes.

To define city codes

1. Navigate to the Administration - Data screen, List of Values view.
2. Query for the Type LOY_CITY_CD.
3. Add one record with this Type value for each city your flights arrive at or depart from.
4. Click Clear Cache.

> **Note:** New values do not go into effect unless you click Clear Cache.

Defining the Distance Between Two Airports

You can define the distance between any two airports (or city pairs) for air travel in the Loyalty Distance table. The distances listed in the table can be used by a base promotion to calculate the base points for air travel.

To define the distance between two airports

1. Navigate to the Loyalty Program Administration tab and click Distance.
2. Click New and complete the following fields:

Field	Comment
Origination Airport	The originating airport for air travel.
Destination Airport	The destination airport for air travel.
Distance	The distance between the two airports (usually in either miles or kilometers).

Defining Loyalty Reason Codes

You can define your own reason codes as described in the following procedure.

To define reason codes

1. Navigate to the Administration - Data screen, List of Values view.
2. Query for the Type LOY_MEM_REASON_CD.
3. Edit the records of this type so there is one record with each of the display values that you want for reason codes.
4. Click Clear Cache.

> **Note:** New values do not go into effect unless you click Clear Cache.

Defining Loyalty Social Media Channels

Siebel Loyalty can be integrated with social media channels, such as Facebook© or Twitter©, using Oracle Social Relationship Management cloud services. If you have implemented Oracle Social Relationship Management, then you must create a list of values entry for each specific social media channel that you want to integrate with Siebel Loyalty by performing the steps in the following procedure. For detailed information on Oracle Social Relationship Management cloud services, see *Siebel CRM Social Media Guide* .

To define social media channels

1. Navigate to the Administration - Data screen, List of Values view.
2. Query for the Type LOY_TXN_CHNNL_CD.
3. Edit the records of this type so there is one record for each of the display values that you want for social media channels.
4. Click Clear Cache.
   New values do not go into effect unless you click Clear Cache.

Adding Employees as Loyalty Users

You add employees as users and define their reporting hierarchy for Siebel Loyalty as you do for other Siebel Business Applications. For more information, see *Siebel Security Guide* .

In addition, the following fields in the Employee record are specific to Siebel Loyalty:

- **Tier Approver.** Select this check box to allow the employee to approve a manual tier change.
- **Transaction Approval Limit.** Enter the maximum number of points an employee can approve for a transaction.
- **Loan Approval Limit.** Enter the maximum loan that the employee can approve for each loan transaction.

Creating the Loyalty Host Company as a Partner

You must create a record representing the Loyalty host company in Partner Administration view. All companies using Loyalty must be registered as partners with the type Loyalty Partner, including the host company as well as the partner companies.

To create the host company as a partner

1. Navigate to Administration - Partner screen, Qualified Partners view.
2. In the Partners list, add a new record, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Name	Enter the name of the host organization (your company).

Field	Description
Partner Type	Select Loyalty Partner.

3. Click Register.
4. In the Register Partner dialog box, select the Organization check box and click Save.

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 *Using Siebel Loyalty with Partners*

To set up partner access to Siebel Loyalty:

- **Set up Siebel PRM.** Follow the instructions in the topic about setting up Siebel PRM in *Siebel Partner Relationship Management Administration Guide* . This topic contains high-level instructions for installing, configuring, and controlling visibility.
- **Add Partner Companies and Employees.** Follow the instructions in the topic about working with new partners in *Siebel Partner Relationship Management Administration Guide* . This topic contains instructions for adding the partner companies and partner employees who 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 are found 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*
- *Mapping Loyalty External Partner Tiers to Loyalty Program Tiers*
- *Selling Loyalty Points to New Partners*

Setting Up Loyalty Partner Point Conversion

To give members points, many partners can send you transaction data, which you can 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 might send you information about how many points in the partner's loyalty program members earned for transactions. For these partners, you must 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 can 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*.

Mapping Loyalty External Partner Tiers to Loyalty Program 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 can be named Platinum member, and the partner's highest tiers can be named special preferred member. You must specify that these tiers are equivalent.

> **Note:** Before you map the external partner tiers to loyalty program tiers, the Loyalty Program and its related tiers must have been defined.

This task is a step in *Process of Setting Up Partner Access to Siebel Loyalty*.

To map the external partner's tiers to loyalty program tiers

1. Navigate to the Partners screen.
2. In the link bar, click Partner List.
3. Select the record for the partner company whose tiers you want to enter and click its Partner name hyperlink.
4. Click the Tier Relationships view tab.
5. Add a new record to the Tier Relationships list for each of the partner's tiers, and enter information about the tier. Some fields are described in the following table.

Field	Description
Partner Tier	Enter the name of the partner tier.
Program	Select the name of your loyalty program whose tiers you are mapping 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 the host, so they can give those points to members who earn rewards by making purchases. You can 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 *About Selling Loyalty Points to Partners*.

This task is a step in *Process of Setting Up Partner Access to Siebel Loyalty*.

Setting Up Customer Access to Siebel eLoyalty

By using Siebel eLoyalty, customers 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 *Member Self-Service with Siebel eLoyalty*

Setting Up Member Access

To allow customers members to use the eLoyalty 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* and see *Troubleshooting the Display of the Catalog and Products to Loyalty Members*.

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 rather than just paying with currency, Loyalty allows the member to pay with points or points and currency. If the product itself is purchased just with points, then the member still has to pay with currency for taxes, shipping, and handling. 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 online. These external systems can be integrated with Siebel eLoyalty Member Portal, so members can use the page from the external system to redeem points within the Member Portal. Siebel Loyalty would store the number of points required for the redemption, but the external system would do the actual reserving of inventory. Once the reservation is made in that system, Siebel Loyalty is notified and processes a redemption transaction to debit the appropriate number of points from the member's account.

Viewing Processing Information for Siebel Loyalty Transactions

You can use processing information for Siebel Loyalty transactions to solve problems with the application.

You can see whether or not a transaction has succeeded or the reason it has been rejected by viewing the transaction log. The log is useful while you are setting up and testing the product. It is also useful when are responding to member

inquiries regarding how many points are accrued or redeemed for a given transaction or promotion. You can also create responsibilities that make the log visible to member service representatives, so they can see which promotions applied to a transaction, how many points each promotion gave, why a transaction was rejected, and so on.

You can view the transaction processing log in the Processing Info view, which enables you to view information about the promotions processed, listed one under another in a single text field.

To view the processing status of a transaction

1. Navigate to the Loyalty Transactions screen.
2. In the Transactions list, identify the transaction whose result you want to view and click the hyperlink in its Transaction Id field.
3. Click the Processing Info view tab. This view has the following fields:
    - **Processed Date.** The day on which the transaction was processed.
    - **Transaction Status and Processing Substatus.** These fields have the possible values described in the following table.
    - **Processing Error Info.** This field has an error message on its first line. The rest of the field is context information that tells you when the error occurred; this information is available only if the error occurred in the context of an action or criterion. This field can contain generic or Loyalty-specific error messages. The Loyalty-specific error messages are described in *Troubleshooting Siebel Loyalty Using Processing Information*.
    - > **Note:** The Transaction Status field is in the Transaction form applet at the start of the screen. The other fields are in the lower applet. You can display this information for both accrual items and redemption items.
    - **Promotions Processed.** This field has information about which promotions were considered for the transaction and what each promotion resulted in. The information is available only if the transaction was processed successfully. First the promotions that qualified are listed with information about the actions being applied. Then the promotions that did not qualify are listed; promotions that did not qualify for the same reasons are grouped together.

Transaction Status	Processing Substatus	Description
Processed	Success	The transaction was processed successfully and some promotions qualified for it.
Processed	No Promotions Qualified	The transaction was processed without any errors, but there were no promotions that qualified. This status is not necessarily an error condition, but it might point to some incorrect configuration like inactive promotions.
Rejected - Engine	Insufficient Member Balance	The redemption transaction attempted to redeem points from the member when the member did not have a sufficient point balance.
Rejected - Engine	Insufficient Point Blocks	The accrual transaction attempted to accrue points for a member when there were not sufficient points in the partner point blocks. This status means that the promotion has run out of points and either needs to be made inactive or the partner needs to buy more point blocks.

Transaction Status	Processing Substatus	Description
Rejected - Engine	Program Inactive	The Program to which the transaction belongs is inactive and hence not loaded in the cache.
Rejected - Engine	Attribute Definition Inactive	The attribute definition that the criterion or action is looking for is not available in the context of the transaction being processed.
Rejected - Engine	Error	There was a generic error during transaction processing that is not specific to the Siebel Loyalty Engine. This error can happen when there is some problem in the Siebel runtime repository such as a field on the business component is not properly configured and the Siebel Loyalty Engine attempts to use that field.

Troubleshooting Siebel Loyalty Using Processing Information

Use the information in the Processing Error Info field to troubleshoot problems. To resolve the problem, look for it in the list of Error Messages in the following table.

Error Message	Cause	Solution
Attribute $$$ not defined in current context.	This error occurs when a criterion or action references an attribute definition that is not available in the current context, for example, accessing a transaction attribute during promotion processing.	Check the definition of the action or criterion mentioned in the error message.
Attribute Definition $$$ is not active. Please check the configuration of your system.	This error occurs when a criterion or action references an attribute definition that has been made inactive.	Check to see whether the attribute definition is active or not.
Calculation of Accrual Expiration Date failed.	This error occurs when there is no dominant tier available for determining the expiration period length for the member.	Check whether the member has at least one active tier and if the tier class definitions for the program are active.
Point Type with Id $$$ is not available. Either it is incorrectly defined or it is no longer available.	This error occurs when the point type definition has been made inactive.	Check whether the point type definition for the mentioned row id is active.
The action failed to evaluate correctly. Please check the action definition.	This error occurs when there was an error in the evaluation of the action.	Check the definition of the Action mentioned in the error message. Make the Expression column visible in the Rule, Action List Applet and check whether it is a valid expression.
The Loyalty Program with Id $$$ was not found.	This error occurs if the program itself has been made inactive.	Check to see whether the Program is active or not.

Error Message	Cause	Solution
The Loyalty Promotion with Id $$$ was not found.	This error indicates that the Promotion with specified row id is not available in the cache for processing. This error typically occurs in the context of bucket or tier processing when the promotion is not available because it is inactive.	Check to see whether the promotion is active and refresh the cache by using the Activate button.
The Member does not have any Tiers that can qualify as a Dominant Tier.	All members must have a dominant tier. If not, then this error occurs when the Siebel Loyalty Engine is trying to evaluate the expiration date of an accrual.	Make sure the member has a dominant tier. See *Defining Tier Classes and Tiers*.
The object type $$$ is not supported by the Siebel Loyalty Engine.	This error indicates that the value of the component parameter LOY - Engine Queue Objects specifies an object type that is not supported.	Check the value of the component parameter to ensure it uses valid object types.
The parameter $$$ required by the Siebel Loyalty Engine is not defined. Please check your system configuration.	This error indicates that the value of one of the component parameters is not specified or is specified but has an unacceptable value.	Check to see whether the parameter mentioned in the error message has an acceptable value.
The process was unable to find an available server routing key to register. Please check the Siebel Loyalty Server key definition of your system.	This error indicates that the Siebel Enterprise has more processes running for the batch component as compared to the number of unique Server - Process number combinations.	Check the MinMTServers and MaxMTServers parameters settings.
The promotion definition you are trying to access is not available. It is either invalid or does not exist.	This error indicates that the Siebel Loyalty Engine is looking for a promotion that is not active.	This error is most likely to happen in two scenarios - tier processing during which the Siebel Loyalty Engine looks for the promotion for that tier and the promotion is inactive. The other scenario is when a promotion is activated just during the Siebel Loyalty Engine startup process. Users must avoid activating/ deactivating promotions when the Siebel Loyalty Engine is being started.
The value of the parameter %1 required by the Siebel Loyalty Engine is incorrect. Please consult your documentation for additional information.	This error indicates that the value of one of the component parameters is not specified correctly.	Check to see whether the parameter mentioned in the error message has an acceptable value.
There are not sufficient points available to redeem.	This error indicates that the member does not have sufficient points to redeem. This cause is an acceptable cause for failure of transaction processing.	Check the member's available balance and verify if the member can make the redemption.
There are not sufficient points in the Point Blocks to accrue points for the member.	This error indicates that the partner does not have sufficient points to accrue from for the member and has run out of points.	Check the point blocks for the partner on the promotion mentioned.

About Siebel Loyalty and Social Media

Siebel CRM can integrate with social media channels, such as Facebook and Twitter, using Oracle Social Relationship Management cloud services. Oracle Social Relationship Management products capture social profile data which Siebel Loyalty users can incorporate into programs and promotions designed to build brand affinity and promote customer retention. Specifically, Siebel Loyalty can employ Oracle Social Relationship Management functionality to do the following:

- Acquire members through social networks.

  Siebel contacts can be created for users on social media platforms using only an individual's social profile information. These Siebel contacts can then be enrolled onto promotions.

  Create loyalty membership schemes specifically for contacts created using social profile data because enrollment onto standard Loyalty membership schemes often requires mandatory data inputs that might not be available for these contacts. For information on creating social loyalty membership schemes, see *Configuring Membership Schemes for Social Media Members*.
- Define social reward promotions that reward members for actions performed on social channels and that encourage increased user activity.

  For additional information about creating social reward promotions, see *About Social Rewards Promotions*.

About Social Rewards Promotions

This topic describes the types of social reward promotions that you can create when Siebel Loyalty is integrated with Oracle Social Relationship Management cloud services.

Loyalty managers can create the following types of social reward promotions:

- Promotions that reward loyalty members for their actions on social networks, such as rating or reviewing a product or promotion, or Liking a product or promotion. Members can also be rewarded for entering their location details, or for location-based actions. Knowledge of a customer's location allows members to be presented with promotions that are specific to that location.

  Siebel Loyalty provides Social Action Type attributes and a Location Code attribute to support this functionality. For an example of creating a promotion to reward social actions, see *Example of Creating a Social Rewards Promotion*.
- Promotions that reward members a referral bonus when their friends enroll in promotions on social networks as a result of their recommendations. The PromotionEnrolmentForSMS method of the LoyaltyMemberService Web service is used to enroll the new member and reward the referring member.

  A promotion action, Reward Referrer, is also provided which supports this functionality. The Reward Referrer action can also be used to assign recurring rewards to the member who received the initial referral bonus for the referred member's on-going accrual transactions. For an example of creating a promotion to reward members with referral bonuses, see *Example of Creating a Reward-Referrals Promotion*.

You can use the existing Siebel Loyalty tier-class and point-type frameworks to create tiers and point types that recognize members' social influence and other activities on social networks. For example, you can define a point type such as Social Reward, which members can be assigned to reward them for activities on social networks, and you can create tier promotions, for example, Brand Ambassador, Brand Advocate, and so on to recognize members based on

their social profile attributes. Members can be assigned a tier status according to the number of Social Reward points accumulated.

For information on creating tiers and point types, see *Defining Tier Classes and Tiers* and *Creating Point Types for Loyalty Programs*. For detailed information on Oracle Social Relationship Management cloud services, see *Siebel CRM Social Media Guide* .

Related Topics

About Siebel Loyalty and Social Media

Configuring Membership Schemes for Social Media Members

Configuring Membership Schemes for Social Media Members

This topic describes how to create default loyalty membership schemes for Siebel contacts created using social media profile data. You must create social membership schemes for these social Siebel contacts to correspond to each of the existing membership types, that is, Individual, Account, and Household.

The following procedure decibels how to create loyalty membership schemes for social media users.

To configure membership schemes for social media members

1. Perform the steps to create a membership scheme as described in *Creating Membership Schemes for Siebel Loyalty*.
2. Create three new Loyalty Product records for social members, one to correspond to each of the existing membership types.

   The following table shows the value to specify for the Product Type and Part # field of each of the new social membership schemes you create.

Product Type Field	Part # Field
Individual Membership	SOCIALLOY_Individual Membership
Account Membership	SOCIALLOY_Account Membership
Household Membership	SOCIALLOY_Household Membership

3. Complete the remaining fields of each Product record as required.

Related Topics

About Siebel Loyalty and Social Media

About Social Rewards Promotions

4 Setting Up Siebel Loyalty Programs

Setting Up Siebel Loyalty Programs

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

- *About Siebel Loyalty Programs*
- *About Loyalty Program Points, Tiers, and Rewards*
- *About Admin Promotions and Tier Promotions*
- *About Promotion Calculation Rules for Loyalty Programs*
- *Process of Setting Up Loyalty Programs*
- *Modifying Loyalty Programs*
- *About Tier Promotions*
- *About Retroactive Tier Changes*
- *Example of Setting Up Retroactive Tier Changes*
- *Siebel Loyalty Batch Engine Parameters*
- *Troubleshooting Disappearing Loyalty Members*
- *Importing and Exporting Loyalty Programs and Promotions*

About Siebel Loyalty Programs

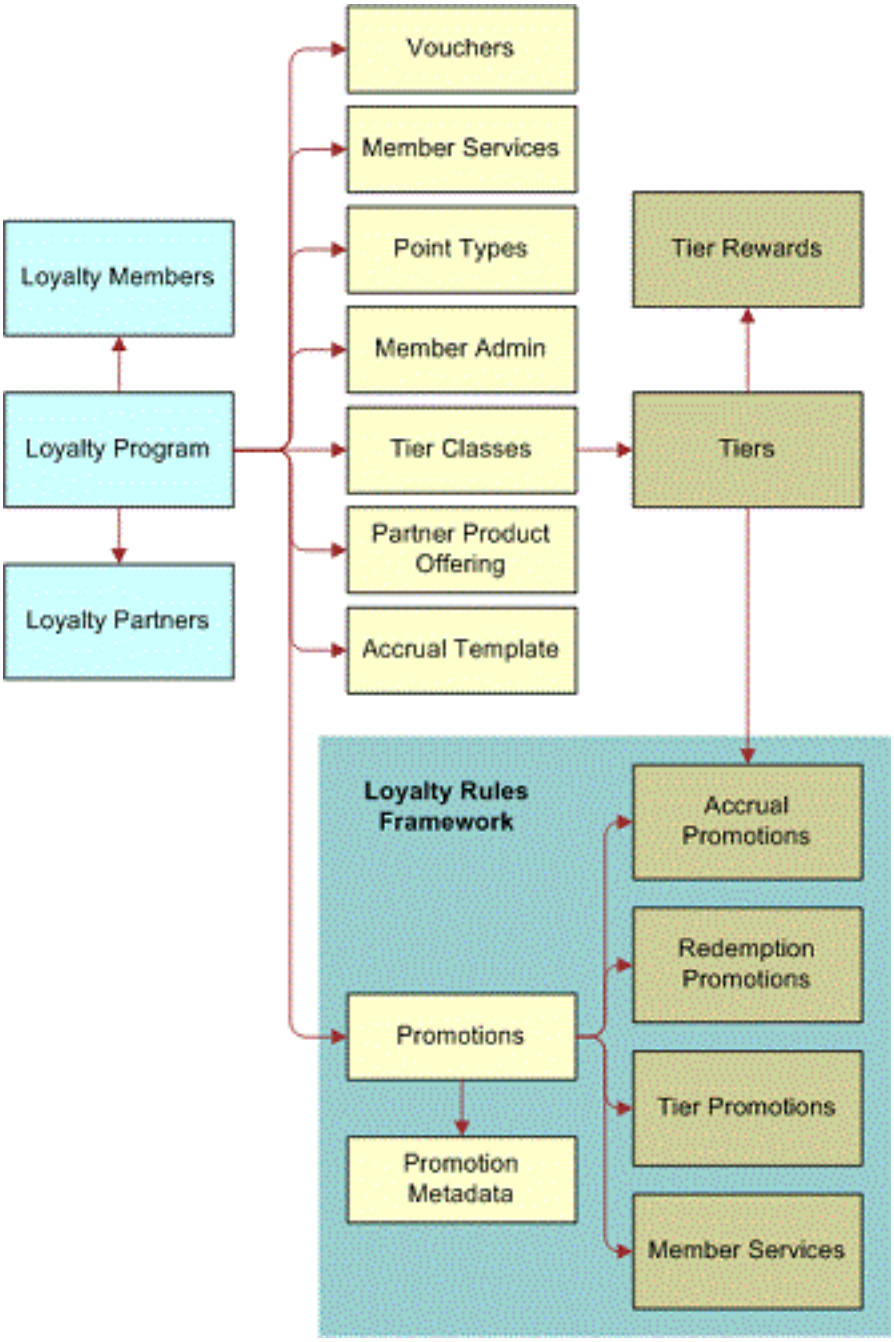
Loyalty programs give members points as rewards for their purchases or for other behavior. Examples of loyalty programs are:

- 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.

A program is the highest level entity in Siebel Loyalty. Members, tiers, promotions, point values, and so on are all specific to a single program. Some entities such as contacts, accounts, and products can be used across multiple programs. The key elements of a loyalty program, as shown in the following image, are as follows:

- A Loyalty Program can have Loyalty Members and Loyalty Partners.
- A Loyalty Program contains the following elements: Vouchers, Member Services, Point Types, Member Admin, Tier Classes, Partner Product Offering, Accrual Template, and Promotions (the loyalty rules framework).
    - The Tier Classes element contains Tiers and Tier Rewards.

      The Tiers element is linked to Accrual Promotions.
    - The Promotions element contains Promotion Metadata and the following elements: Accrual Promotions, Redemption Promotions, Tier Promotions, and Member Services.



Most companies have one loyalty program. A company can have multiple programs if it has two very different sets of memberships bases, accrual and redemption rules, tiers, and so on. For example, a company could have one program targeted at individuals, and another one targeted at corporate accounts.

How programs are set up depends on each company's specific requirements. For example, if you want individual members to be able to transfer points to corporate members (such as when an individual flies, and the corporate parent earns some or all of the points), then you would set up one loyalty program with two different types of memberships - individual and account - and probably with different accrual and redemption rules based upon the membership type.

This chapter describes how to set up loyalty programs.

Before you set up a loyalty program, you must analyze your customer base to see which customers the program must be designed to appeal to. For example, if an airline finds that half of its revenues come from 10 percent of its customers, then it would design the program to appeal to these frequent flyers. For more information, see *Roadmap to Working with Siebel Loyalty*.

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 *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 these ways:

- Redeeming points for rewards
- Qualifying for tier status
- Using points to pay for some member services

Redeeming Points for Rewards

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

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.

> **Note:** You can define products for accrual without specifying points. For example, you can create a generic product, such as Flight, to denote any flight activity. You can then use promotions to allocate points based on the member's transactions with the host company.

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.** Count toward earning tier status, but cannot be redeemed for rewards.
- **Nonqualifying points.** Can be redeemed for rewards and do not count toward earning tier status.

Members can only redeem their nonqualifying points.

Using Points to Pay for Some Member Services

You can set up some member services, such as giving gift points and reactivating points, so members can pay for them using cash, points, or a combination of cash or points. For more information, see *Setting Prices for Member Services*.

Expiration of Points

Points that are given to members might or might not have an expiration date depending on the expiration level defined. The point expiration basis is set at the program level and can be defined at these levels:

- **Tier.** If the expiration basis field is defined as Tier level, then the expiration date is calculated according to what is specified at the tier level. The expiration date is calculated based on the member's tier.
- **Point Type.** The expiration basis field can also be defined as Point Type Level. At the point level, point expiration can be based on either:
  - Member account activity
  - A fixed date
  - A fixed period of time

A point's expiration date is usually maintained at the point level, except expiration for dates based on member activity. However, if the expiration level value defined at the program level is set to Tier Level and Expire Points check box is not selected for a tier, then points do not expire for any member who is part of that tier, even if the points are past their expiration date. The points keep their original expiration date, but they do not expire until the member becomes part of a tier that expires points.

If an accrual transaction is canceled, then the points that were given are returned to the original point block. If a point expires, then it is not added back to the point block. An expired point can no longer be used, just as if the member had used it for a redemption award.

About Admin Promotions and Tier Promotions

When you set up a loyalty program, you must create tier promotions and admin promotions. These are not promotions that give members rewards. Both these types of promotions use the actions of promotions to perform necessary administrative tasks for the program.

Tier promotions move members to the appropriate tier level based on the member's points or behavior. For example, tier promotions can upgrade, downgrade, or requalify members. For more information, see *About Tier Promotions* .

Admin promotions perform other necessary administrative tasks. For more information, see *Creating Admin Promotions*.

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.

> **CAUTION:** Promotion Calculation Rules is a required field. If it is blank, then the promotion is not accessed or applied during transaction processing. To setup the field, select the field in the Column Displayed dialog box, and select one of the four possible options.

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

> **Note:** When loyalty administrators create promotions, they can select an Always Apply check box. If it is selected, then the member receives that promotion even if it would not be included according to the promotion calculation rule. These calculation rules do not apply to Update Attribute actions in promotions; they apply only when a promotion uses an Assign Points action to rewarding members with bonus points.

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, then the one with the largest number of points applies. If the promotions generate different types of points, some qualifying and some nonqualifying, then 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.
- **Maximize by Point Type.** Only one promotion applies for each point type awarded. Multiple promotions can apply, if they generate points of different types. The program decides which promotion is used to generate points for each point type using the qualifying and nonqualifying weight rules 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 nonqualifying points of each type. The calculation is similar to Maximize by Point Type, except that qualifying and nonqualifying points for each type are calculated and awarded separately.
- **All Promotions Apply.** The member receives the combined total of all points from all applicable 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, then 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 the following table.

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

The last three columns in the following table 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 nonqualifying 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/nonqualifying combination, the one with the maximum weighted value is applied. That is four combinations in this example.

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	Yes	Yes	Yes
1	Bonus	350 NQ	140.0	None	Yes	Yes	Yes
2	Base	225 NQ	112.5	392.5	None	None	Yes
2	Bonus	700 NQ	280.0	None	None	None	Yes
3	Base	125 NQ	62.5	102.5	None	None	None
3	Bonus	100 NQ	40.0	None	None	None	None
4	Base	225 Q	225.0	665.0	Yes	Yes	Yes
4	Bonus	550 Q	440.0	None	Yes	Yes	Yes

Process of Setting Up Loyalty Programs

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

1. *Creating Loyalty Programs*
2. *Defining Program Level Attributes for Loyalty*
3. *Defining Point Types and Subtypes for Loyalty Programs*
4. *Creating Point Blocks for Loyalty Programs*
5. *Setting Up Auto-Creation of Point Blocks*
6. *Defining Tier Classes and Tiers*
7. *Creating Tier Promotions*
8. *Creating Vouchers for Loyalty Members*
9. *Defining Vouchers as Tier Rewards*
10. *Configuring Loyalty Vouchers*
11. *Defining Loyalty Product Offerings*
12. *Integrating Siebel Loyalty with Business Intelligence Publisher*
13. *Defining Loan Setup*
14. *Defining Point Transfer Setup*
15. *Defining Point Purchase Setup*
16. *Defining Point Gift Setup*
17. *Setting Prices for Member Services*
18. *Restricting the Redemption Period to Prevent Fraud*
19. *Creating Base Loyalty Promotions*
20. *Creating Admin Promotions*

Note: A new loyalty program can require different lists of values from existing loyalty programs. For example, it can use different membership card types. If this is the case, then before you start this process, create the appropriate lists of values, as described in *Defining Lists of Values for Siebel Loyalty* .

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.

Note: You must perform some of the setup tasks in *Getting Started with Siebel Loyalty* before creating a program. For example, you must create the partner company that hosts the program, or you must define the host company as a partner, so you can select it in the Hosted By field in Step 2 in the following procedure.

To create a loyalty program

1. Navigate to the Loyalty Program Administration screen.
2. Add a new record to the Programs list, completing the necessary fields in the list and in the form. Some fields are described in the following table.

Field	Description
Hosted By	Brings up the Pick Channel Partner list. Select the company that is implementing this program. If the program is implemented by the brand owner company, then select the brand owner company. If programs are implemented by business units of the brand owner company, then you can create an account for each business unit and select the appropriate one. For information about setting up partner companies, see the chapter on working with new partners in *Siebel Partner Relationship Management Administration Guide* .
Partner Flag	Select this check box if the program is implemented by a partner. Clear it if the program is implemented by your own company.
Points Conversion	Select this check box to enable conversion of insufficient points for redemption, during any services payment process, to a currency payment. The conversion is based the cost defined for the product in the product points view. **Note:** This check box is a one-time selection for the program. If this check-box is selected, then members do not get the points-plus pay-option in any redemption.
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*.
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, then the program remains in effect indefinitely.
Transfer/Gift Start Date	Enter the day and month used to calculate restrictions on how many points a member can transfer or give for a one year period. The one year period starts on the day and month entered in this field.
Purchase Start Date	Enter the day and month to calculate restrictions on how many points a member can purchase for one year. The one year period starts on the day and month entered in this field.
Point Expiry Basis	Select the point expiration basis. Options are: o Tier Level. Expiration of points must be defined for each Tier. o .Point Type Level. The Tier level definition of points expiration is disabled and point expiration can only be defined at the point type level.

Defining Program Level Attributes for Loyalty

Attributes can be 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 for promotions, see *Creating Attributes for Loyalty Programs*.

This task is a step in *Process of Setting Up Loyalty Programs*.

Defining Point Types and Subtypes 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*.

Each point type can have both:

- **Qualifying Points.** Count toward a member's tier status.
- **Nonqualifying Points.** Do not count toward tier status.

It is recommended that you have separate point types in the program to represent both qualifying and nonqualifying points. However, only nonqualifying points can be used for redemptions.

If a loyalty program allows members to qualify for a tier through some action, such as the number of flight segments completed or the number of hotel stays, then that action must be represented by another point type. For example, if an airline allows members to qualify for the Silver tier either by earning a given number of points or completing a given number of flight segments, then its loyalty program must have two point types: one to track the number of points, the other to track the number of flight segments.

Other programs can use loyalty point types to link specific actions more tightly with specific rewards. If a loyalty program tracks some member action, then you must create a specific point type for that action. For example, if an airline gives rewards to both individual and corporate members, then you must create two point types, one to track miles for individual members, and one to track corresponding corporate points.

You can define point expiration at the point type level only if the point expiry basis set at the program level is defined at Point Type level. Options include:

- Expire points of members based on account activity.
- Expire points after a period of time.
- Expire points on a fixed day.

For more information about point expiration, see *About Loyalty Program Points, Tiers, and Rewards*.

In addition to point types, you can also define point subtypes, which are used purely for administrative purposes. For example, you might use different point subtypes to keep track of the different reasons that the points are given out. Points can be given out as an incentive with purchases or as a bonus, and you can create point subtypes named Incentive and Bonus to track these two different uses of points.

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

You define which point types and subtypes are given to members as a reward for purchases when you create the Admin - Accruals promotion, as described in *Creating the Admin - Accruals Promotion*.

When you define the Point Sub Types, select one as the default that is given out if no subtype is specified in the Admin - Accruals promotion.

Defining Point Types

The following procedure describes how to define point types.

To define point types

1. Navigate to the Loyalty Program Administration screen.
2. In the Programs list view, select the program that uses the point types you want to define, and click its Program Id hyperlink.
3. Click the Point Types view tab, then add a new record to the Point Types list for each point type. Complete the necessary fields described in the following table.

Field	Description
Name	Enter a name for the point type.
Active	Select this check box to make this point type available to the program.
Field to Use	Select the field in the Members screen used to display the number of points a member has of this point type. You can select options ranging from Point 1 through Point 8. There can be other options if you configure the product as described in *Creating Point Types for Loyalty Programs*.
Qualifying Weight	Enter a weight used to calculate which promotion applies if multiple promotions are available. For more information, see *About Promotion Calculation Rules for Loyalty Programs*.
Non-Qualifying Weight	Enter a weight used to calculate which promotion applies if multiple promotions are available. For more information, see *About Promotion Calculation Rules for Loyalty Programs*.

Field	Description
Accrual Effectivity	Select this check box if the accrued points are not available for redemption until a future date. For more information on the setup for effectivity date calculation, see *Setting Up Loyalty Terms for Precalculated Accruals*. **Note:** Accrual Effectivity and Qualifying Flag are mutually exclusive.
Qualifying Flag	Select this check box if this point type is a qualifying type, to be used for tier assessment rather than only for redemption. **Note:** If you select Qualifying Flag, then the remaining fields - Expiry Basis, Period, Period UOM, Activity, Expiry Month, Expiry Day and Expiration Snap To - become read-only, because they apply only to nonqualifying points.
Expiry Basis	Select an expiration basis. Options are: o Account Activity. If this option is selected, then points expire if there is no activity of the type and in the period specified for the point type. o Period. If this option is selected, then points expire on the day specified in the Expiration Snap To field, after the minimum period of time specified in the Period and Period UOM fields, counting from the Transaction Date. o Fixed Day and Fixed Month. Use these two fields to specify the day and month when points expire.
Period	Enter a period of time. This field and the Period UOM field determine the life of points.
Period UOM	Select the Period UOM. Options are: o Days o Months o Quarters o Years
Activity	Select an Activity. Options include: o Accrual o Redemption o (Both of) Accrual/Redemption The start date for calculating the expiration date of points, earned by the member for accrual transactions that update promotion attributes, can be either one of the following:

Field	Description
	○ The *processing* date of the last transaction for the member that updated the promotion attribute (default value) ○ The *creation* date of the last transaction for the member that updated the promotion attribute To change the default value so that the creation date of the last transaction is used to assess member activity, set the value of the user property Enable Bucket Expiry - Txn Date for the LOY Promotion Bucket Transaction business component to Y. **Note:** This field is activated only if Expiry Basis is Account Activity.
Expiry Month	Enter the month that the points expire. **Note:** If Fixed Day is selected as the Expiry Basis, then this field is enabled.
Expiry Day	Enter the day the points expire. **Note:** If Fixed Day is selected as the Expiry Basis, then this field is enabled.
Expiration Snap To	Select the Expiration Snap To. Options include: ○ Transaction Date ○ Member Anniversary Date ○ 1st Day of Month ○ 1st Day of Quarter ○ 1st Day of Year ○ **Note:** If Period is selected as the Expiry Basis, then this field is enabled. However, if Fixed Day is selected as the Expiry Basis, then this field is disabled.
Reactivation Enabled	Select this checkbox to make it possible to reactivate members' points after they have expired. **Note:** If the Qualifying checkbox is selected, then this field is disabled, because qualifying points cannot be reactivated.
Point Reactivation Duration Point Reactivation UOM	Use these two fields to define the amount of time after their expiration that points can be reactivated. Enter a number in the Point Reactivation Duration field, and select a unit of measure in the Point Reactivation UOM field.

Field	Description
	For example, if you enter 6 as the Point Reactivation Duration and months as the Point Reactivation UOM, then points can be reactivated for six months after they expired.
Minimum Reactivation	Enter the minimum number of points that can be reactivated.

Defining Point Subtypes

The following procedure describes how to define point subtypes.

To define point subtypes

1. Navigate to the Loyalty Program Administration screen.
2. In the Programs list, select the program that uses the point subtypes you want to define, and click its Program Id hyperlink.
3. Click the Point Sub Types view tab, then add a new record to the Point Sub Types list for each point subtype. Complete the necessary fields described in the following table.

Field	Description
Name	Enter a name for the point subtype.
Default	Select the checkbox for one subtype in the list, to indicate that it is the default subtype that is given if no subtype is specified.

Creating Point Blocks for Loyalty Programs

A point block is a set of points, which can be assigned to the host company or a partner. Point blocks must be used so a host company or partner can give reward points to members. Whenever a member accrues points, those points come from a point block associated with that host company or partner. In the event that a host company or partner's point block has insufficient points to reward members, then a partner or host could allocate more points or allow point credits according to the terms of their agreement.

To make points available for use, point blocks must be sold to prepaid partners or to the host company. Point blocks can be created when you set up the program and periodically during the life of the program *Once a* point block is created, it must be submitted for approval.

This task is a step in *Process of Setting Up Loyalty Programs*.

Each point block is created for use by the host company or by a prepaid partner company. Partner companies buy points, as described in *About Selling Loyalty Points to Partners*.

A single point block can apply to multiple point types. The conversion rate defined for each point type determines the relationship between member points and partner points.

For example, a program can have the point types Miles, Status Credit and Regular. Rather than defining a partner point block for each point type, you define a single point block with a conversion rate for each point type, such as 1 for Miles, no conversion rate for Status Credits, and 0.1 for Regular points. See *Setting Up Unified Point Type for Partner Account Debit*.

Creating Point Blocks

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

To create point blocks

1. Navigate to the Loyalty Program Administration screen.
2. In the Programs list, select the program that uses the points and click its Program Id hyperlink.
3. Click the Point Blocks view tab, then add a new record to the Point Blocks list. Complete the necessary fields. Some fields are described in the following table.

Field	Description
Status	When you are finished filling out the record, select Submitted to submit the new point block for approval.
Partner	Select this checkbox to make it possible to select a partner as the company that uses the points. If you do not select this checkbox, then the point block is automatically created for the host company.
Partner/Host	Select the company that uses these points, which can be the host company or a partner company. When an accrual transaction is processed from a company, it uses points from a point block associated with that same company.
Original Number (#) of Points	Enter the total number of points in this point block.
Remaining Points	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	Enter the amount charged to a partner for each point in this point block. For more information about selling points to partners, see *About Selling Loyalty Points to Partners*.
Submit To	Select the approver for creation of this point block. This field is not required, and if it is not entered, then points are created without going though approval.

Approving Point Blocks

After the loyalty manager creates the point block, another manager might have to approve it.

To approve point blocks

1. Navigate to the Loyalty Program Administration screen.
2. In the Programs list, select the program whose point blocks you want to approve and click its Program Id hyperlink.
3. Click the Point Blocks view tab.
4. In the Point Blocks list, use a query to find all point blocks with the value Submitted in the Status field.
5. To approve a point block, select Approved in the 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 must check periodically to see which blocks have few points remaining, so they can create new point blocks as replacements. To avoid checking in this way and creating new point blocks manually, you can set up auto-creation of point blocks for prepaid partners, as described in *Setting Up Auto-Creation of Point Blocks*.

To check the points remaining in blocks

1. Navigate to the Loyalty Program Administration screen.
2. In the Programs list, select the program whose point blocks you want to approve and click its Program Id hyperlink.
3. Click the Point Blocks view tab.
4. In the Point Blocks list, use a query to find all point blocks with a small value in the Remaining Points field.

Setting Up Auto-Creation of Point Blocks

This topic describes how to set up auto-creation of point blocks for prepaid partners so that you do not have to create new point blocks manually whenever a partner is running out of points in a point block.

This task is a step in *Process of Setting Up Loyalty Programs*.

You can auto-create a new point block for a partner by clicking the Replenish Point Block button in the Loyalty Terms view. If the number of points remaining in a point block reaches a value you have previously specified in the Reorder Limit field in the Loyalty Terms view, then pressing the Replenish Point Block button creates a new point block.

> **Note:** Auto-creation of point blocks only applies to prepaid partners. For post-paid partners, setup of point blocks is not required.

You must set up several features for point blocks that are auto-created for a partner, including the pricing rule that is used to price the point block and the Reorder Limit, that is, the point at which a new block of points can be auto-created. To define pricing and terms for a partner, perform the following tasks:

- *Defining Partner Pricing Rules*.
  Define all the pricing rules for a program in the Partner Pricing Rules view for the program.
- *Entering Loyalty Terms for Auto-Creation of Point Blocks*.

Associate the appropriate rule with each partner in the Loyalty Terms view for that partner.

- *Approving and Billing for Auto-Created Point Blocks*.

Defining Partner Pricing Rules

Define pricing rules for different currencies used in each program. For example, if you have a program named *High Miles*, then you might define a number of pricing rules named *High Miles USDollar*, *High Miles Yen*, and so on.

For each pricing rule, there is a Pricing Range view where you enter a list of prices for purchases of different sizes. In this view, enter a list of nonoverlapping ranges of points, with the cost per point for each. The auto-point block created for the partner charges the partner based on the price of the range defined here.

To define a partner pricing rule

1. Navigate to the Loyalty Programs Administration screen.
2. Drill down on the Program Id of the appropriate program.
3. Click the Partner Pricing Rules view tab, then add a new record in the Partner Pricing Rules list. Complete the necessary fields. Some fields are described in the following table.

Field	Description
Name	Enter a unique name for the rule.
Currency Code	Select the currency code this rule applies to.

4. In the Pricing Range list, add new records. Complete the necessary fields described in the following table.

> **Note:** Ranges must not overlap, and a cost must be entered for each range.

Field	Description
Minimum	Enter the minimum number of points in this pricing range.
Maximum	Enter the maximum number of points in this pricing range.
Cost Per Point	Enter the price per point for purchases in this pricing range.

Entering Loyalty Terms for Auto-Creation of Point Blocks

Use the Loyalty Terms view to specify several features of auto-creation of points for each partner, including which pricing rule is used for this partner.

To enter loyalty terms for auto-creation of point blocks for a partner

1. Navigate to the Partners screen, then the Partner List view.

2. Drill down on the Partner Name of the appropriate partner company.
3. In the Loyalty Terms list, add a new record if required and complete the necessary fields. Some fields are described in the following table.

Field	Description
Pricing Rule	Select the pricing rule used to price this point block.
Reorder Limit	Enter the number of points remaining in the existing block for a a new block to be auto-created. For example, if you enter 10,000, then a new block is auto-created when the existing block for this partner has less than or equal to 10,000 points remaining.
Minimum Order Quantity	Enter the number of points in the auto-created point block.

Approving and Billing for Auto-Created Point Blocks

After the point block is auto-generated, it can be approved and the partner must be billed for it in the same way as manually created points. For more information, see *Creating Point Blocks for Loyalty Programs*.

If you selected the Skip Validations check box when defining terms for the point block, as described in *Entering Loyalty Terms for Auto-Creation of Point Blocks*, then the point block does not require approval in order for the points to become available. Be aware, however, that selecting the Skip Validations check box does not affect the status of the point block, which remains as Pending.

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 can be specified in order to divide members based on different criteria. For example, an airline frequent flyer program can define two tier classes, one to divide members based on the number of miles flown during a qualifying period or another tier could be based on program-to-date activity.
- **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 for each tier class. If the tier class is not one that applies to all members, then make the default tier a tier with the Show Flag unchecked.

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

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 set to 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*.

To become a member of 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.

A tier also defines if and when points expire if the point expiry basis is defined as Tier Level. Tier expiration rules are the default. If a promotion's action is to assign points, then the promotion expiration rules override tier expiration rules. For the promotion expiration rules to override the tier expiration rules, you must enter the Expiration Snap To, Expiration Length and UoM fields for the promotion; these fields are described in the following procedure.

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 and click its Program Id hyperlink.
3. Click the Tier Classes view tab, then add a new record to the Tier Classes list. Complete the necessary fields. Some fields are described in the following table.

Field	Description
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 might include standard set to 1, business class set to 2, first class set to 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 must be specified before activating the tier class.
Start Qual Period	Select when the qualifying period starts. This option determines the tier assessment model. The options are: o **Enrollment Date/Anniversary Date.** The qualifying period starts on the day the member enrolls and continues for the length of time specified in the Tiers list. o **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, then the qualifying period lasts from March 17 until April 1 of the next year. o **Fixed Date.** The qualifying period starts on a specified date and continues for the length of time specified in the Tiers list. o **Rolling.** The qualifying period starts on the day the member enrolls and continues for a specified period. **Note:** If you want a tier class to be based on the lifetime points a member has earned, then leave the fields Start Qualifying Period and Restart Qualifying Period blank for that tier class, which essentially creates one qualifying period for the member's entire time as a member.

Field	Description
Restart Qual Period	Select when the length of time for the new qualifying period starts after a tier status change. 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, then the member has 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.
Qual Period Length and Qual 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, then the length is 1 and UoM is Year. If the qualifying period is six months, then length is 6 and UoM is Month. These fields are also available at the tier level. However, even if these values are specified at the tier level, Siebel Loyalty uses values specified at the tier class level. **Note:** These fields are mandatory if Start Qual Period is set to Rolling.
Start Tier Date	This field is enabled only if Start Tier Period is Fixed Date. Enter the day and month that the tier starts.
End Tier Date	This field is enabled only if Start Tier Period is Fixed Date. Enter the day and month that the tier ends.
Min Tier Length and Min Tier Length Period	Enter the minimum period of time that a member is guaranteed membership in any tier within this tier class. For example, if the minimum period is six months, length is 6 and Period is Month. The Tier End date is calculated based on the value of these fields.
Approver	Select the user who approves tier downgrades.
Assessment Schedule Date	Enter the day and month to schedule a tier assessment for a tier class.

Field	Description
Recurring Period	Select how frequently the assessment schedule is repeated. Options are: o Monthly o Yearly
Requal Period Length and Requal Period UoM	Enter the length and unit of measurement for the requalifying period for this tier. For example, if the requalifying period is one year, then the length is 1 and UoM is Year. If the qualifying period is six months, then length is 6 and UoM is Month. **Note:** These fields are enabled only when the requalifying period is same for all the tiers in the tier class.

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

Field	Description
Sequence	Enter a number indicating how high the status of this tier is compared with other tiers. For example, a program might include standard set to 1, Silver set to2, Gold set to 3, Platinum set to 4.
Qual Period Length and Qual 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, then the length is 1 and UoM is Year. If the qualifying period is six months, then length is 6 and UoM is Month. It is recommended that you define Qual Period Length at the tier class level. Values specified for Qual Period Length at the tier class level take precedence over Qual Period Length values specified at the tier level.
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 period is the same as the initial qualifying period. **Note:** The Expiry Basis must be defined as Tier Level at the program level in order for the tier level point expiry set up to be applicable.
Expire Extension in Days	Enter the extension in days before points expire. Typical extensions are 30, 60, 365. **Note:** The Expiry Basis must be defined as Tier Level at the program level in order for the tier level point expiry set up to be applicable.

Field	Description
	For example, if you enter 365, then points do not expire if you earn or redeem any amount of points at least once every 365 days. If you have not earned or redeemed any points for over 365 days, then the Loyalty Engine expires all accrued points. If you do not want to use this feature, then enter a value of 0 for each tier. Do not leave the field blank (null). Entering 0 makes the members points expire according to the tier and promotion point expiration rules regardless of whether the member has had any activity.
Qual Point Expiration Length and Qual Points 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, then the length is 2 and UoM is Year. After points expire, the member can no longer exchange them for rewards. If points never expire, then clear the Expire Points check box.
Non-Qual Point Expiration Length and Non-Qual Point Expiration UoM	Enter the length and unit of measurement when nonqualifying points expire for members of this tier. If points never expire, then clear the Expire Points check box.
Expiration 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 *Generating, Viewing, and Printing Loyalty Members'Statements*. **Note:** You can generate loyalty statements manually from the Statement Administration view. To generate statements automatically based on frequency, you must build a workflow rule that takes the Statement Frequency field value into account, along with any other tier-specific parameters that are necessary. For information about building workflow rules, see *Siebel Business Process Framework: Workflow Guide* .
Only If Activity	If this check box is selected, then a statement can 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.

Field	Description
	Note: To display this field, right-click on the list and use the Columns Displayed feature.
Expire Points	Clear this check box if points never expire for members of this tier. This field overrides the specifications in the fields that indicate when points expire. **Note:** To display this field, right-click on the list and use the Columns Displayed feature.
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 permission to use special lounges. **Note:** To display this field, right-click on the list and use the Columns Displayed feature.
Card Type	Select the membership card type for this tier. **Note:** To display this field, right-click on the list and use the Columns Displayed feature.
Demotion Tier	Select the tier that members are demoted to if they fail to earn enough points to requalify for this tier during the requalifying period. If no value is selected here, then members are demoted to the tier that they qualify for based on the number of points they earned during the requalifying period. **Note:** To display this field, right-click on the list and use the Columns Displayed feature.
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, then they can never be demoted to lower than the Silver tier. **Note:** To display this field, right-click on the list and use the Columns Displayed feature.
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.

Field	Description
	Note: To display this field, right-click on the list and use the Columns Displayed feature.
Downgrade Approval Required	Select this check box to flag members for batch downgrade tier processing. If enabled, then the member's tier downgrade is subject to approval from the approver specified at the Tier Class level.

5. 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.
6. If your loyalty prog4ram has different sets of tiers for different customers, then repeat step 4, step 5, and step 6 until you have defined all of the sets of tiers in the program.

Creating Tier Promotions

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

Before you create tier promotions, you must have a general understanding of how to create promotions, described in *Setting Up Siebel Loyalty Promotions*

Tier promotions are created like reward promotions, as described in *Process of Creating Loyalty Promotions* but they differ in the following ways:

- **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 in the Loyalty Promotions Administration screen and is given a name with the following form: *Tier Promotion: <name of tier>*. There can only be one tier promotion for each tier. You cannot create a tier promotion record and must use this record that is automatically created.
- **Creating the rule for the promotion.** In the Loyalty Promotions Administration screen, you create the rules for the promotion, by creating the Rule, Criteria, Attribute, and Action records as needed to change the tier level of members in this tier. For an overview of how to use these records to create rules, see *About Creating Loyalty Promotions*.
    - **The rule criteria.** When you create the rule, create the criteria as follows:
        - If you select Is Automatic as the first criterion, then this rule triggers an automatic tier change. The tier changed whenever the member meets the rest of the criteria.
        - If you do not select Is Automatic as the first criterion, then this rule triggers a manual tier change. The tier changes only when the user clicks the Approve button in the Member Tier for Approval list. When all the criteria for the tier change are met, the change is queued in this list to wait for manual approval.
        - Apart from Is Automatic, the criteria check to see whether the user has the appropriate number of points to qualify for this tier or to be upgraded or downgraded.
        - If you want to create a rule criterion that compares dates, then you must use the following date format: mm/dd/yyyy.
    - **The rule action.** When you create the rule, create the Action record as follows:

  - Add a new record to the Actions list, and in the Type field, select Tier Change. This option in the Type field is only available for tier promotions.
  - In the record's Detail form, select Upgrade Tier, Downgrade Tier, Qualify Tier, or Re-qualify Tier.
  - If you selected Upgrade Tier or Downgrade Tier, then specify the tier to upgrade or downgrade to.
  - If you selected Qualify Tier or Re-qualify Tier, then you do not have to specify any other values. These selections keep the user in the current tier, based on points required.

- **Specify products.** Use the Product Inclusion field of the Promotion record to include all products, since the tier promotion applies to all 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 view 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 detailed examples of how to create the tier promotions using a variety of tier assessment models, see *About Tier Promotions* .

CAUTION: Do not delete the tier promotion record that is created automatically. If you delete a tier promotion, then you must also delete the tier and all references to it and re-create it from scratch. Even one invalid reference can stop the Loyalty Engine.

Creating Vouchers for Loyalty Members

You must create vouchers in the following situations:

- Create vouchers if you are setting up a loyalty program that gives members vouchers as rewards when they enter a new tier. For more information, see *Defining Vouchers as Tier Rewards*.
- Create vouchers if you create reward promotions that assign vouchers as the reward. For more information, see *Creating an Assign Voucher Action*.
- Create vouchers if member service representatives give vouchers to members, for example to compensate them for missed flights. For more information, see *Giving Vouchers to Members*.

If you create vouchers, then you must also set up the redemption of the vouchers. For more information, see *Setting Up Siebel Loyalty Redemptions* You create vouchers as products. For more information about creating products, see *Siebel Product Administration Guide* .

This task is a step in *Process of Setting Up Loyalty Programs*.

To create a voucher

1. Navigate to the Administration - Product screen.
2. Create a new Product record, and complete the necessary fields.

   In the Type field, select Electronic Voucher.
3. Navigate to the Loyalty Product Attributes view.
4. In the Voucher Attributes area, complete the fields described in the following table.

Field	Description
Sequence Type	Define the numbering scheme. The possible values are Standard and Custom. If you choose the Custom option, then you must create a method to configure the numbering logic you want to use. The method must be implemented on the LOY Customer Action Business Service using Siebel eScript code. To implement the logic, create a method named GenCustomVchrNum, specifying Voucher Type as the input parameter to the method and Voucher Number as the output parameter. The Voucher Number value that is output is then stamped on to the voucher record being generated. For information on creating Siebel eScript code, see *Siebel eScript Language Reference* .
Expiry Basis	Select the expiry basis. Options are: o **Period.** The voucher expires after some specific time period. For example, the voucher might expire after one year. o **Date.** The voucher expires on a specific date. For example, the voucher might expire on December 31, 2011.
Start Day and Start Month	Optionally, you can use these fields to specify the month and day when the voucher becomes valid. If you do not use this field, then the voucher becomes valid on the date of the transaction. If you use these fields, then they determine the dates when the voucher is valid: o **Period.** If the expiry basis is period, then the voucher becomes valid on the start day and start month you specify and it ends after the period you specify. For example, if the start month is February, the start day is 1, and the period is one month, then the voucher expires on March 1 (one month after February 1). If you do not specify the start date and end date, then the voucher starts on the transaction date and expires one month after the transaction date. o **Date.** If the expiry basis is date, then the voucher becomes valid on the on the start day and start month you specify and it ends on the expiry date you specify. If you do not enter a start day and month, then the voucher becomes valid on the date of the transaction and it ends on the expiry date you specify.
Period and Period Type	If you selected Period as the Expiry Basis, then use these fields to specify the period o **Period Type.** Select Days, Months, or Years. o **Period.** Enter the number of days or months or years after which the voucher expires. For example, if you select Period of 6 and a Period Type of Months, then the voucher expires after six months.
Expiry Day, Expiry Month, and Years After	If you selected Date as the Expiry Basis, then use these fields to specify the date o **Expiry Month.** Select the month when the voucher expires. o **Expiry Day.** Select the day of the month when the voucher expires. o **Years After.** Select the number of years after which the voucher expires.

Field	Description
	For example, if you select February as the Expiry Month, 28 as the Expiry Day, and 1 as Years After, then the voucher expires on February 28 of the next year.

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. A voucher can also be issued for a prespecified discount on certain transactions, a free gift (such as a music headset) or a gift certificate with a predefined dollar value.

First, the loyalty administrators must create the vouchers, as described in *Creating Vouchers for Loyalty Members*.

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.

You do not have to create a promotion to assign the voucher as a tier reward. Just associate the voucher with the tier, as described in the following procedure.

This task is a step in *Process of Setting Up Loyalty Programs*.

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*.

To associate vouchers with tiers

1. Navigate to the Loyalty Program Administration screen.
2. In the Loyalty Programs list, select the program that uses the tier rewards and click its Program Id hyperlink.
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.

Configuring Loyalty Vouchers

You can configure the product to change the behavior of vouchers.

Making Vouchers Expire in Days Rather than Months or Years

Without configuration, the Unit of Measure (UOM) for a voucher's expiration length is months or years.

You can configure the product so the UOM also includes days. This configuration enables users to set expiration based on days, for example, to create a voucher that expires in 5 days.

To add days to the UOM for a voucher's expiration date

1. Add a new LOV type called Days.
2. Update the configuration of the Expiration field in the LOY Voucher business component to calculate the expiration date based on the new LOV, using the following formula:

```
IIF([Expiration UOM] = LookupValue("LOY_LEAD_TIME_CD", "Days"), [Created] + 1, [Created] + [Expiration
 In Days])
```

Giving Members a Voucher for Registering

If you want to give members vouchers when they register, then add as a step to the Registration Action-Base Bonus workflow to create a voucher record for the member.

Giving Members a Voucher for a Tier Upgrade

Without configuration, vouchers are not automatically given to members when they upgrade to a new tier. You can configure the product to automatically give members vouchers when they upgrade to a new tier.

To give members a voucher for a tier upgrade

- In the business component LOY Member Tier, enter Y in the value field of the Update Tier Reward user property.

Defining Loyalty Product Offerings

The loyalty product offering is used to create time-limited Partner offerings by associating one or more products with partners for accrual and redemption. The loyalty program host enters into contracts with one or more partners. When a partner offers products for accrual or redemption to a loyalty program, it can be for a time-bound period. For example, a hotel partner might specify that users can get double points during certain months. The product is not available for the members of the loyalty program before or after such dates. If a partner sends an accrual record for an activity beyond such offering dates, then it must be rejected.

For example, a loyalty manager for an airline company, entrusted to maintain the Partnership Agreements and allied setups, adds one new product, Hotel Stay, which is offered by a new partner starting January 1, 2008. The agreement also states that the partner cannot send any transaction that is more than six months old for accrual. The following occurs:

- The partner sends an accrual transaction which was made December 15, 2007, before the offering date. Siebel Loyalty rejects the transaction by looking at the partnership agreement date, stating the appropriate reason.
- The partner starts a Car Rental division starting from March 1, 2008 and offers the same for accrual to the loyalty program Flyer members from June 1, 2008.
- The partner sends an accrual record for a car rental taken on May 15, 2008. Siebel Loyalty rejects the transaction, because Car Rental is not offered for accrual until June 1, 2008.
- The partner on September 10, 2008 sends accrual records in which there is a transaction for a hotel stay taken on January 7, 2008. Siebel Loyalty rejects the transaction, as the partner cannot send a transaction that is more than six months old.

You use the Loyalty Product Offering to define these terms with the partner. You associate the product with the program partner in the Loyalty Product Offering view in the Loyalty Program Administration screen. You can select the program for which the product is being offered by the partner, the effective dates within which the product is available to the members, the offer type and the pricing type (either Points, Points by Distance or Points by Zone). The pricing type field is used exclusively for redemption offerings.

This task is a step in *Process of Setting Up Loyalty Programs*.

Related Topic

Setting Up Loyalty Partner Product Offerings

Integrating Siebel Loyalty with Business Intelligence Publisher

Siebel Loyalty can be integrated with Oracle Business Intelligence Publisher (Oracle BI Publisher).

Oracle BI Publisher allows you to design reports using Microsoft Word, Microsoft Excel, Adobe Acrobat, and other familiar design tools. It includes the ability to create charts, cross-tabs, multiple table formats, conditional formatting, dynamic content, interactive reports. It generates reports in PDF, HTML, Microsoft Excel, Microsoft PowerPoint, and other formats. For information on setting up Oracle BI Publisher, see *Siebel Reports Guide* .

> **Note:** The report types that are available depend on the values in the Administration - Data, List of Values view with the LOY_STMT_TYPE_CD in the Type field. You can add other report types, but you must build the new functionality for any new values you enter.

To integrate Siebel Loyalty with Oracle Business Intelligence Publisher

1. Register the report templates:
    a. Navigate to Administration - BIP Reports screen, Report Template Registration view.
    b. Create a new record, enter the desired report name, and select the corresponding integration object.
    c. Navigate to the Translations view, select the language, and enter the report name.
    d. For the given report name and integration object, select the name of the Template file (which is stored in the local computer).
    e. Select the desired report format.

       Options are PDF, RTF, HTML, and Excel.
    f. Click the Generate Xliff button.

       The xliff file is generated.
    g. Click the Upload File button.
2. Associate the report templates with the appropriate statement types for this program:
    a. Navigate to the Loyalty Program Administration screen.
    b. In the Loyalty Programs list, click the Program Id hyperlink for the appropriate program.
    c. Click the Statement Templates view tab.
    d. Add a new record to the Statement Templates list, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Statement Type	Select the type of report that this template is used for, such as Accrual Dispute, Member Gift Points, or Partner Billing.
Template Name	Select the Oracle BI Publisher template used for this report.

Defining Loan Setup

When a member does not have sufficient points to obtain a redemption product, they might be eligible to take out a loan, to borrow the extra points. Loans are associated with tier levels. For detailed information on how to set up loans, see *Redemption Loans*.

This task is a step in *Process of Setting Up Loyalty Programs*.

Defining Point Transfer Setup

When a member wants to transfer points to another member of the same program, the member can call the customer service representative to transfer these points.

In addition to the steps defined here, you must create a product named Point Transfer, set a price for this product, and associate the product with the program. For more information, see *Setting Prices for Member Services*.

This task is a step in *Process of Setting Up Loyalty Programs*.

To define point transfer setup

1. Navigate to the Loyalty Program Administration screen.
2. In the Programs list, select the program that uses the point transfer you want to define, and click its Program Id hyperlink.
3. Click the Points Transfer Setup view tab.
4. Add a new record to the Point Transfer Setup list for point transfer type. Complete the necessary fields described in the following table.

Field	Description
Limit On	Select the Limit On. Options are: o Transferor o Transferee
Point Type	Select the Point Type.

Field	Description
Membership Type	Select the Membership Type. Options are: o Account o Household o Individual o Partner
Tier	Select the Tier.
Minimum Transaction Quantity	Enter the Minimum Transaction Quantity.
Maximum Transaction Quantity	Enter the Maximum Transaction Quantity.
Transfer Limit	Enter the Transfer Limit.

Defining Point Purchase Setup

When a member discover that there are not enough points to redeem, the member can call the customer service representative to purchase the required points.

In addition to the steps defined here, you must create a point purchase product, set a price for this product, and associate the product with the program. For more information, see *Setting Prices for Member Services*.

This task is a step in *Process of Setting Up Loyalty Programs*.

To define point purchase setup

1. Navigate to the Loyalty Program Administration screen.
2. In the Programs list, select the program that uses the point types you want to define, and click its Program Id hyperlink.
3. Click the Points Purchase Setup view tab.
4. Add a new record to the Point Purchase Setup list for each point purchase type, and complete the necessary fields, described in the following table.

Field	Description
Point Type	Select the Point Type.
Membership Type	Select the Membership Type. Options are:

Field	Description
	○ Account ○ Household ○ Individual ○ Partner
Tier	Select the Tier.
Minimum Transaction Quantity	Enter the Minimum Transaction Quantity.
Maximum Transaction Quantity	Enter the Maximum Transaction Quantity.
Purchase Period Limit	Enter the Purchase Period Limit.

Defining Point Gift Setup

You can allow active members of a program to give points as gifts to other active members of the same program.

You restrict the number of points that can be given or received to prevent members from abusing this feature. For example, if a platinum member can buy points at a 10% discount, then you might want to restrict platinum members so they can give only a limited amount of points, so they do not give too many discounted points to members in other tiers.

You must enter limits on both the giver and the recipient of a specific point type, membership type and tier for gift points to be enabled for that combination of point type, membership type, and tier.

Alternatively, you might want to restrict members in other tiers so they can receive only a limited number of points from platinum members.

In addition to the steps defined here, you must create a point gift product, set a price for this product, and associate the product with the program. For more information, see *Setting Prices for Member Services*.

To define point gift setup

1. Navigate to the Loyalty Program Administration screen.
2. In the Programs list, select the appropriate program, and click its Program Id hyperlink.
3. Click the Point Gift Setup view tab.
4. Add a new record to the Point Purchase Gift list for each combination of point type, membership type, tier, and gift from or gift to. Complete the necessary fields described in the following table.

Field	Description
Limits On	Select Gift From or Gift To to specify whether this record is limiting the number of points that can be given or the number of points that can be received for this point type by members with this membership type and tier.
Point Type	Select the point type that this limit applies to.
Membership Type	Select the membership type that this limit applies to.
Tier	Select the tier that this limit applies to.
Minimum Transaction	Enter the minimum number of points that can be given or received in one transaction for this point type by members of this membership type and tier.
Maximum Transaction	Enter the maximum number of points that can be given or received in one transaction for this point type by members of this membership type and tier.
Gift Period Limit	Enter the maximum number of points that can be given or received during the entire gift period for this point type by members of this membership type and tier. The gift period begins at the date specified in the Transfer/Gift Start Date field in the Program form, and it ends on the date of the transaction.

Setting Prices for Member Services

Siebel Loyalty includes the following member services that you can charge members for:

- Member Enrollment
- Redemption Cancellation
- Membership Renewal
- Gift Points
- Lounge Purchase
- Point Purchase
- Promotion Enrollment (for opt-in promotions)
- Transfer Points
- Voucher Reissue
- Points Reactivation

In order to charge members for one of these services, you must set up the pricing for the service in the program.

For each member service, you must:

- Define a product of type Loyalty Service.
- Set a price for the product. If you want the service to be free, then set a price of zero.
- Associate the product with the program as a service product in the Service Product Association view for the Program. Service product association is required for the following services:
  - Gift Points
  - Points purchase
  - Lounge purchase
  - Points adjustment
  - Points transfer
  - Promotion Enrollment
  - Voucher Reissue

All promotions associated with member services use this product to determine the base price for the service. The pricing of all member services can be further manipulated by the promotion.

Exceptions to this method of pricing are the Member Enrollment, Membership Renewal, and Points Reactivation service, which use a product of a different type:

- **Member Enrollment and Membership Renewal.** The product is defined with the type Individual Membership, Account Membership, or Household Membership, depending on which sort of membership you are pricing. This determines the base prices for these two membership services, which can be further manipulated by the associated promotion.
- **Points Reactivation.** The product has to be defined with the type Points Reactivation and does not have to be associated with the program as a Service product. This determines the base price for the Points Reactivation service, which can be further manipulated by the associated promotion.

You might want to charge different prices for the same member service within a program. For example, you could charge platinum members a lower price than other members for the same service. To charge different prices, you modify the price for the service by creating rules in Loyalty Promotions Administration view. These rules would have the member tier or some other attribute as one of their criteria, and the service price is changed accordingly

This task is a step in *Process of Setting Up Loyalty Programs*.

To set up pricing for member services, perform the following tasks:

- *Creating the Product for the Member Service*
- *Creating the Price for the Member Service Product*
- *Associating the Product with the Member Service*

Creating the Product for the Member Service

For complete information about creating products, see the chapter on basic product administration in *Siebel Product Administration Guide* .

To create the product for the member service

1. Navigate to the Administration - Product screen, then the Products view.
2. Create a new product that includes the following field values:

Field	Description
Name	Enter a name for the product. **Note:** For the promotion enrollment service, the name must be Promotion Enrollment and the type must be Loyalty Service.
Type	For most services, select Loyalty Service. For memberships, select Individual Membership, Household Membership, or Account Membership. For Points Reactivation, select Points Reactivation. For Voucher Reissue or Redemption, select Electronic Voucher.

3. Click the More Info view tab, and click the Loyalty Product Attributes subtab, and complete the necessary fields.
   a. If the service is Membership Enrollment or Points Reactivation, then complete the following fields in the Loyalty Product Attributes subtab for the product.

Field	Description
Period Type	Select the period type for the membership or points. Options are months, years, or lifetime.
Duration	Enter the number of months or years that the membership or reactivated point remain in effect.

   b. If the service is Voucher Reissue, then complete the following fields in the Loyalty Product Attributes subtab for the product.

Field	Description
Sequence Type	Options are Custom and Standard. A standard sequence is generated automatically. For a custom sequence, you must create an eScript to provide the custom voucher number.
Expiry Basis	Select one of the two bases for the voucher expiring: - **Period.** The voucher expires after a period of time.

Field	Description
	- **Date.** The voucher expires on a specific date.
Period	If the Expiry Basis is Period, then enter the number of days, months, or years before the period expires.
Period Type	If the Expiry Basis is Period, then select Days, Months, or Years to specify what the number in the Period field applies to.
Expiry Day	If the Expiry Basis is Date, then enter the day of the month when the voucher expires.
Expiry Month	If the Expiry Basis is Date, then enter the month when the voucher expires.
Years After	If the Expiry Basis is Date, then enter the number of years after the voucher is issued that the voucher expires.

Creating the Price for the Member Service Product

You can create prices for services using three different payment modes. Members can be charged in points, in money payment, or in a combination of points and money payment. You add pricing records for the payment modes that you want to accept for this member service.

Note: Some services only allow a payment mode of Pay, such as Points Purchase, Points Gift, Points Transfer, Enrollment, and Points Reactivation. For these services, you cannot select the payment mode of Points or Points plus Pay.

To create the price for the member service product

1. Navigate to the Administration - Product screen.
2. Drill down on the Name field hyperlink for this price list.
3. Click the More Info view tab.
4. Click the Points view tab under the More Info tab.
5. Add a record for each payment mode you want to accept for this service and complete the necessary fields. Some fields are described in the following table.

Field	Description
Payment Mode	Select the payment mode specified by this record. Options are Pay, Points, and Points plus Pay.
Pay	Enter the amount of money charged for the service. This applies if the payment mode is Pay or Points plus Pay.

Field	Description
Points	Enter the number of points charged for the service. This applies if the payment mode is Points or Points plus Pay.
Program	Select the program this pricing applies to.
Transaction Type	Select Service.

Associating the Product with the Member Service

After you have defined the product and its price, you associate it in the Loyalty Program Administration screen with the appropriate member service. Then members of the program are charged this price for this member service.

To define a service product association

1. Navigate to the Loyalty Program Administration screen.
2. In the Programs list, select the appropriate program and then click its Program Id hyperlink.
3. Click the Service Product Association tab and add a new record. Complete the necessary fields described in the following table.

Field	Description
Service Product	Select the product you created.
Service Type	Select the member service type that you are using this product to price.

Restricting the Redemption Period to Prevent Fraud

Siebel Loyalty allows you to prevent redemption of points until after the goods can no longer be returned, in order to prevent fraud.

For example, a customer might purchase a product that can be returned within 30 days and get loyalty points for the purchase. The customer might redeem all the loyalty points for a reward immediately. Then the customer might return the product and get a full refund, in order to get the redemption reward without actually buying for the product.

You avoid this sort of fraud by entering a value in the Accrual Effectivity in Days field of the Loyalty Terms view, to determine when the accrued points become effective. For example, if the product can be returned in 30 days, then enter 31 days in the field, so a member cannot redeem the points until after the member is no longer allowed to return the product.

This task is a step in *Process of Setting Up Loyalty Programs*.

To restrict the redemption period

1. Navigate to the Loyalty Program Administration screen.
2. Locate the program you want, and click its Program Id field.
3. Click the Partners view tab.
4. In the Partner's list, select the partner that you want or select the host company.
5. In the Loyalty Terms view for that partner or host company, complete the necessary fields. Some fields are described in the following table.

Field	Description
Program	Select the program that the restriction applies to.
Accrual Effectivity in Days	Enter the number of days after purchase when the points become effective.

Creating Base Loyalty Promotions

Base promotions are designed to simplify the process of setting up complex promotions. They are used to calculate base points, based on any of the transaction attributes, member attributes, promotion attributes and so on.

Each program can have only one base promotion. It is created, with no rules, as soon as the program is saved. Users cannot manually create this promotion, nor can they delete it, but they can add rules to calculate the base points for accrual, based on the transaction attributes.

The base promotion can calculate the value of base accrual from the following:

- Points associated at the product level, based on the airport codes, booking class, or zones.
- The distance table for the origin destination pairs.
- Lookup values from any lookup table in Siebel Loyalty.
- Calculated fields, such as age of member or days and nights of a hotel stay based on check-in and check-out dates.

The fields can be used for criteria as well as in actions, for example:

- Points based on the distance table for air products, using product type, product and partner as criteria.
- Hotel stay accrual, based on the nights stayed where the partner sends only check-in and check-out dates.
- For the same hotel, if you stay in Australia then the accruals are based on amount spent, but if you stay outside Australia then the accruals are based on nights stayed. However, the partner sends the same data for both transactions, and Siebel Loyalty has to calculate accruals based on the location code in the transaction.
- If a member takes a flight on a weekend then he gets 10% additional bonus.
- Senior Citizens (if the member has completed 65 years on the activity date) get double points on all Credit Card transactions.

Note: These fields are available for all types of promotions; not just for the base promotion.

The base points calculated, based on one of the these methods, can then be used as a basis for rewarding a bonus and incentives. This basis is achieved by making the base points available for all the promotions. The base points calculated are not allocated to the members directly.

The points are allocated to members using another action, Assign Points. This action can only be part of another promotion. A program can have only one active base promotion.

The Action type, Calculate Base Price, must be selected, then select either Custom or Distance Table in the Object field. In the Attribute field, select the attribute to be used to give the points from one of the following options:

- Transaction attributes
- Member attributes
- Promotion Attributes
- Partner Attributes
- Product Attributes

This task is a step in *Process of Setting Up Loyalty Programs*.

Distance Table

The distance table is found after the Loyalty Programs tab. You can use it to add airport code pairs and specify the distance between them. These distances can be used by the base promotion to give points to a member. For more information, see *Defining the Distance Between Two Airports*.

For example, a member, John, flies with King Air. John flies between New York and Paris. The distance between the two airports has been entered as 5000 miles in the distance table. The base promotion calculates the base points as 5000, based on the distance table. An accrual admin promotion gives the 5000 points to the member. In addition, John is a Gold tier member and has traveled in Class A. Based on these facts, the member recognition promotion gives 10% of the base points, and the cabin reward promotion gives another 500 points, to the member. John gets a total of 6000 points.

Custom Calculation

Custom calculation involves calling a custom business service to calculate the points and return a value. The custom business service can use data, by means of custom look-up tables outside of Siebel Loyalty, to calculate base points. This option is relevant when the base point calculation involves complex mathematical operations involving data stored outside of Siebel Loyalty.

Example of Custom Calculation

For example, VoiceMobile loyalty program rewards members with base points based on the following criteria:

- One point for each dollar billed on Local calls
- Two points for each dollar billed on Long distance calls
- Four points for each dollar billed on VAS to the members.

A member of VoiceMobile loyalty program, has:

- $100 bill amount on local calls
- $250 on Long distance calls
- $75 on VAS

This member is rewarded (100 plus 500 plus 300) 900 base points.

These base points can then be used as a basis for rewarding bonus and incentives. The base points are available for all the promotions.

For example, VoiceMobile loyalty program rewards 25% of base points as bonus to members in Gold tier. This member, who is a Gold member, earns 175 points as bonus (that is, 900 times 0.25 equals 175 points).

> **Note:** The Point Limit Type option is not available for users to choose, because you cannot limit base accrual points based on the point block.

Code Example for Custom Calculation

The value used in the custom calculation is sourced from the custom attribute defined in Program Level Attributes view. This custom attribute calls a custom function to derive this value. This function must be written as part of the LOY Customer Action Business Service.

The following example of the code for a custom function shows how to read Input parameters and return output arguments.

```
function GetValuesCustomAttribute(inputs, outputs)

{
 try{

 // All the field values would be in the format Object.Field.Field Name. All the
 // values would be passed to custom attributes.
 // Using transaction Id and querying transaction BC must be avoided because in
 // simulation mode the attributes passed in transaction are passed to simulation.
 // Always use the values from the Transaction.Field.Field Name.

 var strOrgAirPort = inputs.GetProperty ("Transaction.Field.Origination Airport");
 var strDestAirPort = inputs.GetProperty ("Transaction.Field.Destination Airport");
 var customCoeff = inputs.GetProperty ("Transaction.Field.Custom Coeff Factor");

 var points = 0;

 if(strOrgAirPort == "SFO" &&strDestAirPort ="BOS")
 points = 200 * customCoeff ;

 outputs.SetProperty("Field Value",points);
 }
 catch(e)
 {
 TheApplication().RaiseErrorText(e.toString());
 }
 finally
 {
 }
}
```

Creating Admin Promotions

When you create a new program, you must create admin promotions to assign the points that are calculated by the base promotion 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 admin promotions apply to every transaction of every member of the program. You must not make them visible to members as promotions. The admin promotions perform processing in the background.

You must create a transaction attribute, which is used by the admin promotion that processes the cancellations. Then you must create and activate the admin promotions.

This task is a step in *Process of Setting Up Loyalty Programs*.

Perform the following tasks:

- *Creating the Transfer Member Id Transaction Attribute*
- *Creating the Admin - Accruals Promotion*
- *Creating the Admin - Cancellation Promotion*
- *Creating the Admin - Gift Promotion*
- *Creating the Admin - Loan Promotion*
- *Creating the Admin - Point Transfer Promotion*
- *Creating the Admin - Redemptions Promotion*
- *Creating the Admin - Voucher Promotion*
- *Creating the Admin - Points Purchase Promotion*
- *Creating the Admin - Transfer Points Promotion*
- *Creating the Admin - Gift Points Promotion*
- *Creating the Admin - Availment Promotion*
- *Creating the Admin - Voucher Reissue Promotion*
- *Creating the Admin - Bonus Promotion*
- *Creating the Admin - Lounge Purchase Promotion*
- *Creating the Admin - Membership Renewal Promotion*
- *Creating the Admin - Member Enrollment Promotion*
- *Creating the Admin - Manual Credit Promotion*
- *Creating the Admin - Manual Debit Promotion*
- *Creating the Admin - Points Reactivation Promotion*
- *Creating the Admin - Points Reactivation Promotion*
- *Creating the Admin - Points Reactivation Promotion*
- *Activating the Admin Promotions*

Creating the Transfer Member Id Transaction Attribute

Use this procedure to create the attribute.

To create the Transfer Member Id transaction attribute

1. Navigate to Administration - Data screen, then the List of Values view.
2. Add an LOV value record with field values as shown in the following table.

Field	Value
Type	LOY_ATTRIB_FIELDS_TXN
Display Value	Transfer Member Id
Parent LIC	Transfer Member Id
Order	19
Translate	False

For information about adding an LOV value, see the chapter on working with lists of values in *Siebel Applications Administration Guide* .

3. Navigate to the Loyalty Program Administration screen.
4. Select the program for which you want to create the admin promotions and clear the program's Active check box.
5. Click the hyperlink in the Program Id field.
6. Click the Program Level Attributes view tab and click Transaction Attributes on the link bar.
7. Create a new transaction attribute record with field values as shown in the following table.

Field	Value
Name	Transfer Member Id
Field	Transfer Member Id
Active	Selected

8. In the loyalty program form in the upper part of the screen, select the program's Active check box and click Update Cache.

Creating the Admin - Accruals Promotion

Use this procedure to create the promotion.

To create the Admin - Accruals promotion

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

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

3. Click the Promotion Number (#) field's hyperlink.
4. Click the Rules view tab.
5. Create the rule for this promotion:
   a. Add a new record to the Rules list, entering the values shown in the following table.

Field	Value
Sequence	1
Name	Check Points
Apply To	Transactions

   b. Click the Name field's hyperlink.
   c. Add a new record to the Criteria list, entering the values shown in the following table.

Field	Value
Sequence	1
Name	Check Points
Type of Comparison	Compare to Values

d. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Transaction Points
Condition	Is Greater Than

e. Add a new record to the Values list and enter 0 in the Value field.
f. Click the Actions view tab.
g. Add a new record to the Actions list, entering the values shown in the following table.

Field	Value
Sequence	1.
Name	Give Points.
Type	Assign Points.
Use From Transaction	Y.
Point Type	Enter the point type given.
Qualifying	If the points are qualifying, then select the check box.
Point Sub Type	Enter The point subtype given.

Field	Value
Object	Transaction.
Attribute	Transaction Points.

Creating the Admin - Cancellation Promotion

Use this procedure to create the promotion.

To create the Admin - Cancellation promotion

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

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

3. Click the Promotion Number (#) field's hyperlink.
4. Click the Rules view tab.
5. Create a rule for this promotion:

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

Field	Value
Sequence	1
Name	Invoke Cancel Action
Apply To	Transactions

b. Click the Name field's hyperlink.
c. Click the Actions view tab.
d. Add a new record to the Actions list, entering the values in the following table.

Field	Description
Sequence	1
Name	Invoke Cancel
Type	Cancel Transaction

e. Add another new record to the Actions list, entering the values in the following table.

Field	Description
Sequence	2
Name	CancelTxnAttributes
Type	Invoke Custom Action
Method	CancelTxnAttributes

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

> **Note:** This step is required if your loyalty program receives retroactive transactions.

Field	Description
Sequence	3
Name	RTC Manual
Type	RTC Manual

Creating the Admin - Gift Promotion

Use this procedure to create the promotion.

To create the Admin - Gift promotion

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

Field	Value
Name	Admin - Gift
Apply To	Accrual-Gift

Leave all other field values the same as in the Admin - Accruals promotion record.
When you copy the Admin - Accruals promotion, Siebel Loyalty also copies its associated Rule. In the Rule copy, leave all values the same.

Creating the Admin - Loan Promotion

Use this procedure to create the promotion.

To create the Admin - Loan promotion

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

Field	Value
Name	Admin - Loan.
Always Apply	Y.

Field	Value
Apply To	Loan.
Admin	Select the Admin check box.
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 admin promotion to expire.

3. Click the Promotion Number (#) field's hyperlink.
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, entering the values in the following table.

Field	Value
Sequence	1
Name	Loan
Apply To	Transactions

   b. Click the Name field's hyperlink.
   c. Add a new record to the Criteria list, entering the values in the following table.

Field	Value
Sequence	1
Name	Loan
Type of Comparison	Compare to Values

d. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Transaction Sub Type
Condition	Equals

e. Add a new record to the Values list and enter Loan in the Value field.
f. Click the Actions view tab.
g. Add a new record to the Actions list, entering 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 thread bar, click Promotion:Admin - Loan.
b. Add a new record to the Rules list, entering the values in the following table.

Field	Value
Sequence	2
Name	Loan Repayment

Field	Value
Rule Applies To	Transactions

c. Click the new rule's Name hyperlink.
d. Add a new record to the Criteria list, entering the values in the following table.

Field	Value
Sequence	1
Name	Loan Repayment
Type of Comparison	Compare to Values

e. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Transaction Sub Type
Condition	Equals

f. Add a new record to the Values list and enter Loan Repayment in the Value field.
g. Click the Actions view tab.
h. Add a new record to the Actions list, entering the values in the following table.

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

Field	Value
Object	Transaction
Attribute	Transaction Points

i. Add another new record to the Actions list, entering the values in the following table.

Field	Value
Sequence	2
Name	SetLoanBalance
Type	Invoke Custom Action
Method	SetLoanBalance

Creating the Admin - Point Transfer Promotion

Use this procedure to create the promotion.

To create the Admin - Point Transfer promotion

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

Field	Value
Name	Admin - Point Transfer.
Always Apply	Y.
Apply To	Point Transfer.
Admin	Select the Admin check box.
Program	Enter the name of the program.
Partner	Enter the partners for the program.

Field	Value
Product Inclusion	All Products.
Promotion Start	Enter one day before today's date.
Promotion End	Leave this field blank, because you do not want the admin promotion to expire.

3. Click the Promotion Number (#) field's hyperlink.
4. Click the Rules view tab.
5. Create the first rule for this promotion:

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

Field	Value
Sequence	1
Name	Points Transfer
Apply To	Transactions

   b. Click the Name field's hyperlink.
   c. Add a new record to the Criteria list, entering the values in the following table.

Field	Value
Sequence	1
Name	Check Points
Type of Comparison	Compare to Values

   d. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction

Field	Value
Attribute	Transaction Points
Condition	Is Greater Than

e. Add a new record to the Values list and enter 0 (zero) in the Value field.
f. Add another new record to the Criteria list, entering the values in the following table.

Field	Value
Sequence	2
Name	Check Type
Type of Comparison	Compare to Values

g. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Transaction Type
Condition	Equals

h. Add a new record to the Values list and enter *Redemption* in the Value field.
i. Click the Actions view tab.
j. Add a new record to the Actions list, entering the values in the following table.

Field	Value
Sequence	1
Name	Redeem Points
Type	Redeem Points

Field	Value
Use from Transaction	Y
Object	Transaction Points
Attribute	Transaction Points

k. Add another new record to the Actions list, entering the values in the following table.

Field	Value
Sequence	2
Name	Create an Accrual Txn
Type	Invoke Custom Action
Method	PointTransfer

6. Create the second rule for this promotion:
   a. In the thread bar, click Promotion:Admin - Point Transfer.
   b. Add a new record to the Rules list, entering the values in the following table.

Field	Value
Sequence	2
Name	Assign Points
Rule Applies To	Transactions

   c. Click the new rule's Name hyperlink.
   d. Add a new record to the Criteria list, entering the values in the following table.

Field	Value
Sequence	1

Field	Value
Name	Check Points
Type of Comparison	Compare to Values

e. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Transaction Points
Condition	Is Greater Than

f. Add a new record to the Values list and enter 0 (zero) in the Value field.
g. Add another new record to the Criteria list, entering the values in the following table.

Field	Value
Sequence	2
Name	Check Type
Type of Comparison	Compare to Values

h. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Transaction Type
Condition	Equals

i. Add a new record to the Values list and enter Accrual in the Value field.

j. Click the Actions view tab.
k. Add a new record to the Actions list, entering the values in the following table.

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

Creating the Admin - Redemptions Promotion

Use this procedure to create the promotion.

To create the Admin - Redemptions promotion

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

Field	Value
Name	Admin - Redemption.
Always Apply	Y.
Apply To	Redemption-Product.
Admin	Select the Admin check box.
Program	Enter the name of the program.
Partner	Enter the partners for the program.

Field	Value
Product Inclusion	All Products.
Product Limit Type	Unlimited.
Promotion Start	Enter one day before today's date.
Promotion End	Leave this field blank, because you do not want the admin promotion to expire.

3. Click the Promotion Number (#) field's hyperlink.
4. Click the Rules view tab.
5. Create the rule for this promotion:
   a. Add a new record to the Rules list, entering the values in the following table.

Field	Value
Sequence	1
Name	Check Points
Apply To	Transactions

   b. Click the Name field's hyperlink.
   c. Add a new record to the Criteria list, entering the values in the following table.

Field	Value
Sequence	1
Name	Check Points
Type of Comparison	Compare to Values

   d. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction

Field	Value
Attribute	Transaction Points
Condition	Is Greater Than

e. Add a new record to the Values list and enter 0 in the Value field.
f. Click the Actions view tab.
g. Add a new record to the Actions list, entering 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

Creating the Admin - Voucher Promotion

Use this procedure to create the promotion.

To create the Admin - Voucher promotion

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

Field	Value
Name	Admin - Voucher.
Always Apply	Y.

Field	Value
Apply To	Voucher.
Program	Enter the name of the program.
Partner	Enter the partners for the program.
Product Inclusion	All Products.
Promotion Start	Enter one day before today's date.
Promotion End	Leave this field blank, because you do not want the admin promotion to expire.

3. Click the Promotion Number (#) field's hyperlink.
4. Click the Rules view tab.
5. Create the first rule for this promotion:

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

Field	Value
Sequence	1
Name	Debit Voucher
Apply To	Transactions

   b. Click the Name field's hyperlink.
   c. Add a new record to the Criteria list, entering the values in the following table.

Field	Value
Sequence	1
Name	Debit Voucher Transaction
Type of Comparison	Compare to Values

d. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Transaction Sub Type
Condition	Does Not Equal

e. Add a new record to the Values list and enter Cancellation in the Value field.
f. Click the Actions view tab.
g. Add a new record to the Actions list, entering the values in the following table.

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

6. Create the second rule for this promotion:

a. In the thread bar, click Promotion:Admin - Voucher.
b. Add a new record to the Rules list, entering the values in the following table.

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

c. Click the new rule's Name hyperlink.
d. Add a new record to the Criteria list, entering the values in the following table.

Field	Value
Sequence	1
Name	Cancel Voucher Transaction
Type of Comparison	Compare to Values

e. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Transaction Sub Type
Condition	Equals

f. Add a new record to the Values list and enter Cancellation in the Value field.
g. Click the Actions view tab.
h. Add a new record to the Actions list, entering the values in the following table.

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

Creating the Admin - Points Purchase Promotion

Use this procedure to create the promotion.

To create the Admin - Points Purchase promotion

1. Navigate to the Loyalty Promotions Administration screen.

2. Add a new record to the Promotions list, entering the values in the following table.

Field	Value
Name	Admin - Points Purchase.
Always Apply	Y.
Apply To	Point Purchase.
Admin	Select the Admin check box.
Program	Enter the name of the program.
Partner	Enter the partners for the program.
Product Inclusion	All Products.
Promotion Start	Enter one day before today's date.
Promotion End	Leave this field blank, because you do not want the admin promotion to expire.

3. Click the Promotion Number (#) field's hyperlink.
4. Click the Rules view tab.
5. Create the first rule for this promotion:
   a. Add a new record to the Rules list, entering the values in the following table.

Field	Value
Sequence	1
Name	Override Payment & Payment Mode are PAY
Apply To	Transactions

   b. Click the Name field's hyperlink.
   c. Add a new record to the Criteria list, entering the values in the following table.

Field	Value
Sequence	1
Name	Check Override Flag
Type of Comparison	Compare to Values

d. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Override Price Flag
Condition	Equals

e. Add a new record to the Values list and enter “Y" in the Value field.
f. Click the Actions view tab.
g. Add a new record to the Actions list, entering the values in the following table.

Field	Value
Sequence	1
Name	Update Pay
Type	Update Attribute
Object	Transaction
Attribute	Transaction Amount

h. Add another record to the Actions list, entering the values in the following table.

Field	Value
Sequence	2
Name	Purchase Points
Type	Invoke Custom Action
Method	PurchasePoints

6. Create the second rule for this promotion:
   a. In the thread bar, click Promotion:Admin - Points Purchase.
   b. Add a new record to the Rules list, entering the values in the following table.

Field	Value
Sequence	2
Name	Payment Mode is PAY
Rule Applies To	Transactions

   c. Click the new rule's Name hyperlink.
   d. Add a new record to the Criteria list, entering the values in the following table.

Field	Value
Sequence	1
Name	Check Payment Type
Type of Comparison	Compare to Values

   e. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction

Field	Value
Attribute	Payment Type Code
Condition	Equals

f. Add a new record to the Values list and enter Pay in the Value field.
g. Click the Actions view tab.
h. Add a new record to the Actions list, entering the values in the following table.

Field	Value
Sequence	1
Name	Update Pay
Type	Update Attribute
Object	Transaction
Attribute	Transaction Amount

i. Add a new record to the Actions list, entering the values in the following table.

Field	Value
Sequence	2
Name	Purchase Points
Type	Invoke Custom Transaction
Method	PurchasePoints

Creating the Admin - Transfer Points Promotion

Use this procedure to create the promotion.

To create the Admin - Transfer Points promotion

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

Field	Value
Name	Admin - Transfer Points.
Always Apply	Y.
Apply To	Transfer Points.
Admin	Select the Admin check box.
Program	Enter the name of the program.
Partner	Enter the partners for the program.
Product Inclusion	All Products.
Promotion Start	Enter the promotion start date.
Promotion End	Leave this field blank, because you do not want the admin promotion to expire.

3. Click the Promotion Number (#) field's hyperlink.
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	Override Payment & Payment Mode are PAY
Apply To	Transactions

    b. Click the Name field's hyperlink.

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

Field	Value
Sequence	1
Name	Check Overide Flag
Type of Comparison	Compare to Values

d. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Overide Price Flag
Condition	Equals

e. Add a new record to the Values list and enter “Y" in the Value field.
f. Click the Actions view tab.
g. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Update Pay
Type	Update Attribute
Object	Transaction
Attribute	Transaction Amount

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

Field	Value
Sequence	2
Name	Transfer Points
Type	Invoke Custom Action
Method	TransferPoints

6. Create the second rule for this promotion:
   a. In the thread bar, click Promotion:Admin - Transfer Points.
   b. Add a new record to the Rules list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Payment Mode is PAY
Rule Applies To	Transactions

   c. Click the new rule's Name hyperlink.
   d. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Check Payment Type
Type of Comparison	Compare to Values

   e. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction

Field	Value
Attribute	Payment Type Code
Condition	Equals

f. Add a new record to the Values list and enter Pay in the Value field.
g. Click the Actions view tab.
h. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Update Pay
Type	Update Attribute
Object	Transaction
Attribute	Transaction Amount

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

Field	Value
Sequence	2
Name	Transfer Points
Type	Invoke Custom Action
Method	TransferPoints

Creating the Admin - Gift Points Promotion

Use this procedure to create the promotion.

To create the Admin - Gift Points promotion

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

Field	Value
Name	Admin - Gift Points.
Always Apply	Y.
Apply To	Gift Points.
Admin	Select the Admin check box.
Program	Enter the name of the program.
Partner	Enter the partners for the program.
Product Inclusion	All Products.
Promotion Start	Enter the promotion start date.
Promotion End	Leave this field blank, because you do not want the admin promotion to expire.

3. Click the Promotion Number (#) field's hyperlink.
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	Pay without OV-Points 1-500
Apply To	Transactions

   b. Click the Name field's hyperlink.

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

Field	Value
Sequence	1
Name	OV N
Type of Comparison	Compare to Values

d. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Overide Price Flag
Condition	Equals

e. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Payment Mode is Pay
Type of Comparison	Compare to Values

f. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Payment Type Code
Condition	Equals

Field	Value

g. Add a new record to the Values list and enter Pay in the Value field.
h. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	3
Name	Compare points Range -Min
Type of Comparison	Compare to Values

i. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Transaction Points
Condition	Is Greater Than or Equal To

j. Add a new record to the Values list and enter 1 in the Value field.
k. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	4
Name	Compare points Range-Max
Type of Comparison	Compare to Values

l. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Transaction Points
Condition	Is Less Than or Equal To

m. Add a new record to the Values list and enter 500 in the Value field.
n. Click the Actions view tab.
o. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Amount
Type	Update Attribute
Update this attribute: Object	Transaction
Update this attribute: Attribute	Amount
Update this attribute: Action	Set
With this attribute: Object	Transaction
With this attribute: Attribute	Amount
And/or this value: Operator	Multiply
And/or this value: Value	.5

p. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Gift Points Action Type
Type	Invoke Custom Action
Method	GiftPoints

6. Create the second rule for this promotion:
   a. In the thread bar, click Promotion:Admin - Gift Points.
   b. Add a new record to the Rules list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Pay With OV
Rule Applies To	Transactions

   c. Click the new rule's Name hyperlink.
   d. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	OV N
Type of Comparison	Compare to Values

   e. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction

Field	Value
Attribute	Override Price Flag
Condition	Equals

f. Add a new record to the Values list and enter Y in the Value field.
g. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Payment Mode is Pay
Type of Comparison	Compare to Values

h. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Payment Type Code
Condition	Equals

i. Add a new record to the Values list and enter Pay in the Value field.
j. Click the Actions view tab.
k. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Amount
Type	Update Attribute

Field	Value
Update this attribute: Object	Transaction
Update this attribute: Attribute	Amount
Update this attribute: Action	Set
With this attribute: Object	Transaction
With this attribute: Attribute	Amount
And/or this value: Operator	Multiply
And/or this value: Value	1

l. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Gift Points Action Type
Type	Invoke Custom Action
Method	GiftPoints

7. Create the third rule for this promotion:

   a. In the thread bar, click Promotion:Admin - Gift Points.
   b. Add a new record to the Rules list, and enter the values in the following table.

Field	Value
Sequence	3
Name	Pay without OV-Base Member

Field	Value
Rule Applies To	Transactions

c. Click the new rule's Name hyperlink.
d. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	OV N
Type of Comparison	Compare to Values

e. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Override Price Flag
Condition	Equals

f. Add a new record to the Values list and enter N in the Value field.
g. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Payment Mode is Pay
Type of Comparison	Compare to Values

h. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Payment Type Code
Condition	Equals

i. Add a new record to the Values list and enter Pay in the Value field.
j. Add another new record to the Criteria list, and enter the values in the following table.

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

k. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Member
Attribute	HM Tier Class 1
Condition	Equals

l. Add a new record to the Values list and enter Base in the Value field.
m. Click the Actions view tab.
n. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Amount

Field	Value
Type	Update Attribute
Update this attribute: Object	Transaction
Update this attribute: Attribute	Amount
Update this attribute: Action	Set
With this attribute: Object	Transaction
With this attribute: Attribute	Amount
And/or this value: Operator	Multiply
And/or this value: Value	1

o. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Gift Points Action Type
Type	Invoke Custom Action
Method	GiftPoints

Creating the Admin - Availment Promotion

Use this procedure to create the promotion.

To create the Admin - Availment promotion

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

Field	Value
Name	Admin - Availment.
Always Apply	Y.
Apply To	Redemption-Availment.
Admin	Select the Admin check box.
Program	Enter the name of the program.
Partner	Enter the partners for the program.
Product Inclusion	All Products.
Promotion Start	Promotion start date.
Promotion End	Leave this field blank, because you do not want the admin promotion to expire.

3. Click the Promotion Number (#) field's hyperlink.
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	Avail Voucher
Apply To	Transactions

   b. Click the Name field's hyperlink.
   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	Avail Voucher
Type	Invoke Custom Action
Method	AvailVoucher

Creating the Admin - Voucher Reissue Promotion

Use this procedure to create the promotion.

To create the Admin - Voucher Reissue promotion

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

Field	Value
Name	Admin - Voucher Reissue.
Always Apply	Y.
Apply To	Voucher Reissue.
Admin	Select the Admin check box.
Program	Enter the name of the program.
Partner	Enter the partners for the program.
Product Inclusion	All Products.
Promotion Start	Enter the promotion start date.
Promotion End	Leave this field blank, because you do not want the admin promotion to expire.

3. Click the Promotion Number (#) field's hyperlink.
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	Override Price Case
Apply To	Transactions

   b. Click the Name field's hyperlink.
   c. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Check Override Flag
Type of Comparison	Compare to Values

   d. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Override Price Flag
Condition	Equals

   e. Add a new record to the Values list and enter "Y" in the Value field.
   f. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	2

Field	Value
Name	Check Transaction Points
Type of Comparison	Compare to Values

g. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Transaction Points
Condition	Is Greater Than

h. Add a new record to the Values list and enter 0 (zero) in the Value field.
i. Click the Actions view tab.
j. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Redeem Points
Type	Redeem Points
Object	Transaction
Attribute	Transaction Points

k. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	2

Field	Value
Name	Reissue Voucher
Type	Invoke Custom Action
Method	ReissueVoucher

6. Create the second rule for this promotion:
   a. In the thread bar, click Promotion:Admin - Voucher Reissue.
   b. Add a new record to the Rules list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Check Points and Reissue Voucher
Rule Applies To	Transactions

   c. Click the new rule's Name hyperlink.
   d. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Check Transaction Points
Type of Comparison	Compare to Values

   e. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Transaction Points

Field	Value
Condition	Is Greater Than

f. Add a new record to the Values list and enter 0 (zero) in the Value field.
g. Click the Actions view tab.
h. Add a new record to the Actions list, and enter the values in the following table.

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

i. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Reissue Voucher
Type	Invoke Custom Action
Method	ReissueVoucher

7. Create the third rule for this promotion:

a. In the thread bar, click Promotion:Admin - Voucher Reissue.
b. Add a new record to the Rules list, and enter the values in the following table.

Field	Value
Sequence	3
Name	Reissue Voucher
Rule Applies To	Transactions

c. Click the new rule's Name hyperlink.
d. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Reissue Voucher
Type	Invoke Custom Action
Method	ReissueVoucher

Creating the Admin - Bonus Promotion

Use this procedure to create the promotion.

To create the Admin - Bonus promotion

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

Field	Value
Name	Admin - Bonus.
Always Apply	Y.
Apply To	Accrual Bonus.
Admin	Select the Admin check box.

Field	Value
Program	Enter the name of the program.
Partner	Enter the partners for the program.
Product Inclusion	All Products.
Promotion Start	Enter the promotion start date.
Promotion End	Leave this field blank, because you do not want the admin promotion to expire.

3. Click the Promotion Number (#) field's hyperlink.
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	Assign Points
Apply To	Transactions

   b. Click the Name field's hyperlink.
   c. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Check Product
Type of Comparison	Compare to Values

   d. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Product Name
Condition	Equals

e. Add a new record to the Values list and enter Product ID in the Value field.
f. Click the Actions view tab.
g. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Assign Point
Type	Assign Points
Point Type	Use from Transaction
Object	Transaction
Attribute	Transaction Points

Creating the Admin - Lounge Purchase Promotion

Use this procedure to create the promotion.

To create the Admin - Lounge Purchase promotion

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

Field	Value
Name	Admin - Lounge Purchase.
Always Apply	Y.

Field	Value
Apply To	Lounge Purchase.
Admin	Select the Admin check box.
Program	Enter the name of the program.
Partner	Enter the partners for the program.
Product Inclusion	All Products.
Promotion Start	Enter the promotion start date.
Promotion End	Leave this field blank, because you do not want the admin promotion to expire.

3. Click the Promotion Number (#) field's hyperlink.
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	Override Payment and Payment Mode are PAY
Apply To	Transactions

   b. Click the Name field's hyperlink.
   c. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Check Overide Flag

Field	Value
Type of Comparison	Compare to Values

d. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Override Price Flag
Condition	Equals

e. Add a new record to the Values list and enter Y in the Value field.
f. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Check Payment Type
Type of Comparison	Compare to Values

g. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Payment Type Code
Condition	Equals

h. Add a new record to the Values list and enter Pay in the Value field.
i. Click the Actions view tab.
j. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Update Pay
Type	Update Attribute
Object	Transaction
Attribute	Transaction Amount

k. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Lounge Purchase
Type	Invoke Custom Action
Method	LoungePurchase

6. Create the second rule for this promotion:

   a. In the thread bar, click Promotion:Admin - Lounge Purchase.
   b. Add a new record to the Rules list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Override Payment and Payment Mode are Points
Rule Applies To	Transactions

   c. Click the new rule's Name hyperlink.

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

Field	Value
Sequence	1
Name	Check Overide Flag
Type of Comparison	Compare to Values

e. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Override Price Flag
Condition	Equals

f. Add a new record to the Values list and enter Y in the Value field.

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

Field	Value
Sequence	2
Name	Check Payment Type
Type of Comparison	Compare to Values

h. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Payment Type Code

Field	Value
Condition	Equals

i. Add a new record to the Values list and enter Points in the Value field.
j. Click the Actions view tab.
k. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Update Points
Type	Redeem Points
Object	Transaction
Attribute	Transaction Points

l. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Lounge Purchase
Type	Invoke Custom Action
Method	LoungePurchase

7. Create the third rule for this promotion:

a. In the thread bar, click Promotion:Admin - Lounge Purchase.
b. Add a new record to the Rules list, and enter the values in the following table.

Field	Value
Sequence	3

Field	Value
Name	Override Payment and Payment Mode are POINTS plus PAY
Rule Applies To	Transactions

c. Click the new rule's Name hyperlink.
d. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Check Override Flag
Type of Comparison	Compare to Values

e. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Override Price Flag
Condition	Equals

f. Add a new record to the Values list and enter Y in the Value field.
g. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Check Payment Type
Type of Comparison	Compare to Values

h. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Payment Type Code
Condition	Equals

i. Add a new record to the Values list and enter Points_Pay in the Value field.
j. Click the Actions view tab.
k. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Update Pay
Type	Update Attribute
Object	Transaction
Attribute	Transaction Amount

l. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	3
Name	Lounge Purchase
Type	Invoke Custom Action
Method	LoungePurchase

8. Create the fourth rule for this promotion:

   a. In the thread bar, click Promotion:Admin - Lounge Purchase.
   b. Add a new record to the Rules list, and enter the values in the following table.

Field	Value
Sequence	4
Name	Payment Mode is PAY
Rule Applies To	Transactions

   c. Click the new rule's Name hyperlink.
   d. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Check Payment Type
Type of Comparison	Compare to Values

   e. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Payment Type Code
Condition	Equals

   f. Add a new record to the Values list and enter PAY in the Value field.
   g. Click the Actions view tab.
   h. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Update Pay
Type	Update Attribute
Object	Transaction
Attribute	Transaction Amount

i. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Lounge Purchase
Type	Invoke Custom Action
Method	LoungePurchase

9. Create the fifth rule for this promotion:

   a. In the thread bar, click Promotion:Admin - Lounge Purchase.
   b. Add a new record to the Rules list, and enter the values in the following table.

Field	Value
Sequence	5
Name	Payment Mode is POINTS
Rule Applies To	Transactions

   c. Click the new rule's Name hyperlink.

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

Field	Value
Sequence	1
Name	Check Payment Type
Type of Comparison	Compare to Values

e. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Payment Type Code
Condition	Equals

f. Add a new record to the Values list and enter Points in the Value field.
g. Click the Actions view tab.
h. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Update Points
Type	Redeem Points
Object	Transaction
Attribute	Transaction Points

i. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Lounge Purchase
Type	Invoke Custom Action
Method	LoungePurchase

10. Create the sixth rule for this promotion:

    a. In the thread bar, click Promotion:Admin - Lounge Purchase.
    b. Add a new record to the Rules list, and enter the values in the following table.

Field	Value
Sequence	6
Name	Payment Mode are POINTS plus PAY
Rule Applies To	Transactions

    c. Click the new rule's Name hyperlink.
    d. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Check Payment Type
Type of Comparison	Compare to Values

    e. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction

Field	Value
Attribute	Payment Type Code
Condition	Equals

f. Add a new record to the Values list and enter Points_Pay in the Value field.
g. Click the Actions view tab.
h. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Update Points
Type	Redeem Points
Object	Transaction
Attribute	Transaction Points

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

Field	Value
Sequence	2
Name	Update Pay
Type	Update Attribute
Object	Transaction
Attribute	Transaction Amount

j. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	3
Name	Lounge Purchase
Type	Invoke Custom Action
Method	LoungePurchase

Creating the Admin - Membership Renewal Promotion

Use this procedure to create the promotion.

To create the Admin - Membership Renewal promotion

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

Field	Value
Name	Admin - Membership Renewal.
Always Apply	Y.
Apply To	Membership Renewal.
Admin	Select the Admin check box.
Program	Enter the name of the program.
Partner	Enter the partners for the program.
Product Inclusion	All Products.
Promotion Start	Enter the promotion start date.
Promotion End	Leave this field blank, because you do not want the admin promotion to expire.

3. Click the Promotion Number (#) field's hyperlink.
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	Overide Payment and Payment Mode are PAY
Apply To	Transactions

   b. Click the Name field's hyperlink.
   c. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Check Override Flag
Type of Comparison	Compare to Values

   d. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Overide Price Flag
Condition	Equals

   e. Add a new record to the Values list and enter Y in the Value field.
   f. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1

Field	Value
Name	Check Payment Type
Type of Comparison	Compare to Values

g. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Payment Type Code
Condition	Equals

h. Add a new record to the Values list and enter Pay in the Value field.
i. Click the Actions view tab.
j. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Update Pay
Type	Update Attribute
Object	Transaction
Attribute	Transaction Amount

k. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	2

Field	Value
Name	Membership Renewal
Type	Invoke Custom Action
Method	RenewMember

6. Create the second rule for this promotion:
   a. In the thread bar, click Promotion:Admin - Membership Renewal.
   b. Add a new record to the Rules list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Override Payment and Payment Mode are POINTS
Rule Applies To	Transactions

   c. Click the new rule's Name hyperlink.
   d. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Check Override Flag
Type of Comparison	Compare to Values

   e. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Override Price Flag

Field	Value
Condition	Equals

f. Add a new record to the Values list and enter Y in the Value field.
g. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Check Payment Type
Type of Comparison	Compare to Values

h. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Payment Type Code
Condition	Equals

i. Add a new record to the Values list and enter Points in the Value field.
j. Click the Actions view tab.
k. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Update Points
Object	Transaction
Attribute	Transaction Points

l. Click the Actions view tab.
m. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Membership Renewal
Type	Invoke Custom Action
Method	RenewMember

7. Create the third rule for this promotion:

a. In the thread bar, click Promotion:Admin - Membership Renewal.
b. Add a new record to the Rules list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Override Payment and Payment Mode are POINTS plus PAY
Rule Applies To	Transactions

c. Click the new rule's Name hyperlink.
d. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Check Override Flag
Type of Comparison	Compare to Values

e. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Override Price Flag
Condition	Equals

f. Add a new record to the Values list and enter Y in the Value field.
g. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Check Payment Type
Type of Comparison	Compare to Values

h. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Payment Type Code
Condition	Equals

i. Add a new record to the Values list and enter Points_Pay in the Value field.
j. Click the Actions view tab.
k. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Update Points

Field	Value
Type	Redeem Points
Object	Transaction
Attribute	Transaction Points

l. Click the Actions view tab.

m. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Update Pay
Type	Update Attribute
Object	Transaction
Attribute	Transaction Amount

n. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	3
Name	Membership Renewal
Type	Invoke Custom Action
Method	RenewMember

8. Create the fourth rule for this promotion:

   a. In the thread bar, click Promotion:Admin - Membership Renewal.

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

Field	Value
Sequence	4
Name	Payment Mode is PAY
Rule Applies To	Transactions

c. Click the new rule's Name hyperlink

.

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

Field	Value
Sequence	1
Name	Check Payment Type
Type of Comparison	Compare to Values

e. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Payment Type Code
Condition	Equals

f. Add a new record to the Values list and enter Pay in the Value field.
g. Click the Actions view tab.
h. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1

Field	Value
Name	Update Pay
Type	Update Attribute
Object	Transaction
Attribute	Transaction Amount

i. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Membership Renewal
Type	Invoke Custom Action
Method	RenewMember

9. Create the fifth rule for this promotion:

a. In the thread bar, click Promotion:Admin - Membership Renewal.
b. Add a new record to the Rules list, and enter the values in the following table.

Field	Value
Sequence	5
Name	Payment Mode is POINTS
Rule Applies To	Transactions

c. Click the new rule's Name hyperlink.
d. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Check Payment Type
Type of Comparison	Compare to Values

e. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Payment Type Code
Condition	Equals

f. Add a new record to the Values list and enter Points in the Value field.
g. Click the Actions view tab.
h. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Update Points
Type	Redeem Points
Object	Transaction
Attribute	Transaction Points

i. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Membership Renewal
Type	Invoke Custom Action
Method	RenewMember

10. Create the sixth rule for this promotion:

    a. In the thread bar, click Promotion:Admin - Membership Renewal.
    b. Add a new record to the Rules list, and enter the values in the following table.

Field	Value
Sequence	6
Name	Payment Mode is POINTS plus PAY
Rule Applies To	Transactions

    c. Click the new rule's Name hyperlink.
    d. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Check Payment Type
Type of Comparison	Compare to Values

    e. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction

Field	Value
Attribute	Payment Type Code
Condition	Equals

f. Add a new record to the Values list and enter Points_Pay in the Value field.
g. Click the Actions view tab.
h. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Update Points
Type	Redeem Points
Object	Transaction
Attribute	Transaction Points

i. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Update Pay
Type	Update Attribute
Object	Transaction
Attribute	Transaction Amount

j. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	3
Name	Membership Renewal
Type	Invoke Custom Action
Method	RenewMember

Creating the Admin - Member Enrollment Promotion

This promotion allows members to enroll in programs. Use this procedure to create the promotion.

To create the Admin - Enrollment promotion

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

Field	Value
Name	Admin - Enrollment.
Always Apply	Y.
Apply To	Enrollment.
Admin	Select the Admin check box.
Program	Enter the name of the program.
Partner	Enter the partners for the program.
Product Inclusion	All Products.
Promotion Start	Enter the promotion start date.
Promotion End	Leave this field blank, because you do not want the admin promotion to expire.

3. Click the Promotion Number (#) field's hyperlink.
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	Payment Mode is PAY
Apply To	Transactions

   b. Click the Name field's hyperlink.
   c. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Check Payment Type
Type of Comparison	Compare to Values

   d. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Payment Type Code
Condition	Equals

   e. Add a new record to the Values list and enter Pay in the Value field.
   f. Click the Actions view tab.
   g. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Update Pay
Type	Update Attribute
Object	Transaction Amount

Creating the Admin - Manual Credit Promotion

Use this procedure to create the promotion.

To create the Admin - Manual Credit promotion

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

Field	Value
Name	Admin - Manual Credit.
Always Apply	Y.
Apply To	Manual Credit.
Admin	Select the Admin check box.
Program	Enter the name of the program.
Partner	Enter the partners for the program.
Product Inclusion	All Products.
Promotion Start	Enter the promotion start date.
Promotion End	Leave this field blank, because you do not want the admin promotion to expire.

3. Click the Promotion Number (#) field's hyperlink.
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	Enter the name of the rule.
Apply To	Transactions

    b. Click the Name field's hyperlink.
    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	Give Points
Type	Assign Points
Point Type	Use from Transaction
Object	Transaction
Attribute	Transaction Points

Creating the Admin - Manual Debit Promotion

Use this procedure to create the promotion.

To create the Admin - Manual Debit promotion

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

Field	Value
Name	Admin - Manual Debit.
Always Apply	Y.
Apply To	Manual Debit.
Admin	Select the Admin check box.
Program	Enter the name of the program.
Partner	Enter the partners for the program.
Product Inclusion	All Products.
Promotion Start	Enter the promotion start date.
Promotion End	Leave this field blank, because you do not want the admin promotion to expire.

3. Click the Promotion Number (#) field's hyperlink.
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	Enter the name of the rule.
Apply To	Transactions

   b. Click the Name field's hyperlink.
   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	Redeem Points
Type	Redeem Points
Point Type	Use from Transaction
Object	Transaction
Attribute	Transaction Points

Creating the Admin - Promotion Enrollment Promotion

Use this procedure to create the promotion.

To create the Admin - Promotion Enrollment promotion

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

Field	Value
Name	Promotion Enrollment.
Always Apply	N.
Apply To	Promotion Enrollment.
Admin	Select this checkbox.
Program	Enter the name of the program.
Partner	Enter the name of the partner.
Product Inclusion	All Products.

Field	Value
Point Limit Type	Unlimited.
Promotion Start	Enter one day before today's date.
Promotion End	Leave this field blank, because you do not want the admin promotion to expire.

3. Click the Promotion Number (#) field's hyperlink.
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	Override Payment & Payment Mode are Pay for (include Promotion name here)
Apply To	Transactions

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

Field	Value
Sequence	1
Name	Check Payment Mode
Type	Compare to Values

   d. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction

Field	Value
Attribute	Payment Type Code
Condition	Equals

e. Add a new record to the Values list and enter Pay in the Value field.
f. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Check Override Price Flag
Type	Compare to Values

g. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Override Price Flag
Condition	Equals

h. Add a new record to the Values list and enter Y in the Value field.
i. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	3
Name	Enroll Promotion
Type	Compare to Values

j. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Enrolled Promotion Id
Condition	Equals

k. Add a new record to the Values list and enter the enrolled promotion Id in the Value field.

> **Note:** You can display the enrolled promotion Id by pressing Ctrl-Alt-K while highlighting the promotion in Promotions view.

l. Click the Actions view tab.

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

Field	Value
Sequence	1
Name	Update Amount.
Type	Update Attribute.
Update this attribute: Object	Transaction.
Update this attribute: Attribute	Amount.
Update this attribute: Action	Set.
With this attribute: Object	Transaction.
With this attribute: Attribute	Amount.
And/Or this value	Leave this section blank.

n. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Enroll to Promotion
Type	Promotion Enrollment

Note: No additional detail is needed for this action.

o. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	3
Name	Update Incentive choice.
Type	Update Attribute.
Update this attribute: Object	Member.
Update this attribute: Attribute	Select the Member attribute for the incentive choice. There are as many member attributes for incentive choices as the number of promotions that require enrollment. You must select the Member attribute for the incentive choice that contains the promotion number for the current promotion.
Update this attribute: Action	Set.
With this attribute: Object	Transaction.
With this attribute: Attribute	Select the Transaction attribute for the Promotion Incentive Choice.
And/Or this value	Leave this section blank.

6. Click the Rules view tab.
7. Create the second rule for this promotion:
   a. Add a new record to the Rules list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Override payment & Payment mode are Points
Apply To	Transactions

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

Field	Value
Sequence	1
Name	Check Payment mode
Type	Compare to Values

d. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Payment Type Code
Condition	Equals

e. Add a new record to the Values list and enter Points in the Value field.
f. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Check Override Flag

Field	Value
Type	Compare to Values

g. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Override Price Flag
Condition	Equals

h. Add a new record to the Values list and enter Y in the Value field.
i. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	3
Name	Enroll Promotion
Type	Compare to Values

j. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Enrolled Promotion Id
Condition	Equals

k. Add a new record to the Values list and enter the enrolled promotion Id in the Value field.
l. Click the Actions view tab.
m. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Enroll to Promotion
Type	Promotion Enrollment

Note: No additional detail is needed for this action.

n. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Redeem Points.
Type	Redeem Points.
Point Type: Use From Transaction	Select this checkbox.
Point Type: Point Type	Leave this field blank.
From this attribute: Object	Transaction.
From this attribute: Attribute	Transaction Points.
And/Or this value	Leave this section blank.

o. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	3
Name	Update Incentive Choice.

Field	Value
Type	Update Attribute.
Update this Attribute: Object	Member.
Update this attribute: Attribute	Select the Member attribute for the incentive choice. There are as many member attributes for incentive choices as the number of promotions that require enrollment. You must select the Member attribute for the incentive choice that contains the promotion number for the current promotion.
Update this attribute: Action	Set.
With this attribute: Object	Transaction.
With this attribute: Attribute	Select the Transaction attribute for the Promotion Incentive Choice.
And/Or this value	Leave this section blank.

8. Click the Rules view tab.
9. Create the third rule for this promotion:
    a. Add a new record to the Rules list, and enter the values in the following table.

Field	Value
Sequence	3
Name	Override payment & Payment mode are Points plus Pay
Apply To	Transactions

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

Field	Value
Sequence	1

Field	Value
Name	Check Payment Mode
Type	Compare to Values

d. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Payment Type Code
Condition	Equals

e. Add a new record to the Values list and enter Points plus (+) Pay in the Value field.
f. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Check Override Flag
Type	Compare to Values

g. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Override Price Flag
Condition	Equals

h. Add a new record to the Values list and enter Y in the Value field.

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

Field	Value
Sequence	3
Name	Enroll Promotion
Type	Compare to Values

j. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Enrolled Promotion Id
Condition	Equals

k. Add a new record to the Values list and enter the enrolled promotion Id in the Value field.
l. Click the Actions view tab.
m. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Update Amount.
Type	Update Attribute.
Update this attribute: Object	Transaction.
Update this attribute: Attribute	Amount.
Update this attribute: Action	Set.
With this attribute: Object	Transaction.

Field	Value
With this attribute: Attribute	Amount.
And/Or this value	Leave this section blank.

n. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Enroll to Promotion
Type	Promotion Enrollment

Note: No additional detail is needed for this action.

o. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	3
Name	Redeem Points.
Type	Redeem Points.
Point Type: Use From Transaction	Select this checkbox.
Point Type: Point Type	Leave this field blank.
From this attribute: Object	Transaction.
From this attribute: Attribute	Transaction Points.
And/Or this value	Leave this section blank.

Field	Value

p. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	4.
Name	Update Incentive choice.
Type	Update Attribute.
Update this attribute: Object	Member.
Update this attribute: Attribute	Select the Member attribute for the incentive choice. There are as many member attributes for incentive choices as the number of promotions that require enrollment. You must select the Member attribute for the incentive choice that contains the promotion number for the current promotion.
Update this attribute: Action	Set.
With this attribute: Object	Transaction.
With this attribute: Attribute	Select the Transaction attribute for the Promotion Incentive Choice.
And/Or this value	Leave this section blank.

10. Click the Rules view tab.
11. Create the fourth rule for this promotion:

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

Field	Value
Sequence	4
Name	Payment Mode is Pay
Apply To	Transactions

Field	Value

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

Field	Value
Sequence	1
Name	Check Payment Mode
Type	Compare to Values

d. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Payment Type Code
Condition	Equals

e. Add a new record to the Values list and enter Pay in the Value field.
f. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	2
Name	No override
Type	Compare to Values

g. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Override Price Flag
Condition	Equals

h. Add a new record to the Values list and enter N in the Value field.
i. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	3
Name	Enroll Promotion
Type	Compare to Values

j. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Enrolled Promotion Id
Condition	Equals

k. Add a new record to the Values list and enter the enrolled promotion Id in the Value field.
l. Click the Actions view tab.
m. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1.
Name	Update Amount.

Field	Value
Type	Update Attribute.
Update this attribute: Object	Transaction.
Update this attribute: Attribute	Amount.
Update this attribute: Action	Set.
With this attribute: Object	Transaction.
With this attribute: Attribute	Amount.
And/Or this value	Leave this section blank.

n. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Enroll to Promotion
Type	Promotion Enrollment

Note: No additional detail is needed for this action.

o. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	3.
Name	Update Incentive Choice.
Type	Update Attribute.

Field	Value
Update this attribute: Object	Member.
Update this attribute: Attribute	Select the Member attribute for the incentive choice. There are as many member attributes for incentive choices as the number of promotions that require enrollment. You must select the Member attribute for the incentive choice that contains the promotion number for the current promotion.
Update this attribute: Action	Set.
With this attribute: Object	Transaction.
With this attribute: Attribute	Select the Transaction attribute for the Promotion Incentive Choice.
And/Or this value	Leave this section blank.

12. Click the Rules view tab.
13. Create the fifth rule for this promotion:
    a. Add a new record to the Rules list, and enter the values in the following table.

Field	Value
Sequence	5
Name	Payment mode is Points
Apply To	Transactions

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

Field	Value
Sequence	1
Name	Check Payment mode

Field	Value
Type	Compare to Values

d. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Payment Type Code
Condition	Equals

e. Add a new record to the Values list and enter Points in the Value field.
f. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	2
Name	No Override
Type	Compare to Values

g. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Override Price Flag
Condition	Equals

h. Add a new record to the Values list and enter N in the Value field.
i. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	3
Name	Enroll Promotion
Type	Compare to Values

j. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Enrolled Promotion Id
Condition	Equals

k. Add a new record to the Values list and enter the enrolled promotion Id in the Value field.
l. Click the Actions view tab.
m. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Enroll to Promotion
Type	Promotion Enrollment

Note: No additional detail is needed for this action.

n. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	2.

Field	Value
Name	Redeem Points.
Type	Redeem Points.
Point Type: Use From Transaction	Select this checkbox.
Point Type: Point Type	Leave this field blank.
From this attribute: Object	Transaction.
From this attribute: Attribute	Transaction Points.
And/Or this value: Value	Leave this section blank.

o. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	3.
Name	Update Incentive Choice.
Type	Update Attribute.
Update this attribute: Object	Member.
Update this attribute: Attribute	Select the Member attribute for the incentive choice. There are as many member attributes for incentive choices as the number of promotions that require enrollment. You must select the Member attribute for the incentive choice that contains the promotion number for the current promotion.
Update this attribute: Action	Set.
With this attribute: Object	Transaction.
With this attribute: Attribute	Select the Transaction attribute for the Promotion Incentive Choice.

Field	Value
And/Or this value	Leave this section blank.

14. Click the Rules view tab.
15. Create the sixth rule for this promotion:
    a. Add a new record to the Rules list, and enter the values in the following table.

Field	Value
Sequence	6
Name	Payment mode is Points plus Pay
Apply To	Transactions

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

Field	Value
Sequence	1
Name	Check Payment Mode
Type	Compare to Values

    d. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Payment Type Code
Condition	Equals

e. Add a new record to the Values list and enter Points plus (+) Pay in the Value field.
f. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	2
Name	No override
Type	Compare to Values

g. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Override Price Flag
Condition	Equals

h. Add a new record to the Values list and enter N in the Value field.
i. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	3
Name	Enroll Promotion
Type	Compare to Values

j. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Enrolled Promotion Id

Field	Value
Condition	Equals

k. Add a new record to the Values list and enter the enrolled promotion Id in the Value field.
l. Click the Actions view tab.
m. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1.
Name	Update Amount.
Type	Update Attribute.
Update this attribute: Object	Transaction.
Update this attribute: Attribute	Amount.
Update this attribute: Action	Set.
With this attribute: Object	Transaction.
With this attribute: Attribute	Amount.
And/Or this value	Leave this section blank.

n. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Enroll to Promotion
Type	Promotion Enrollment

Field	Value

Note: No additional detail is needed for this action.

o. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	3.
Name	Redeem Points.
Type	Redeem Points.
Point Type: Use From Transaction	Select this checkbox.
Point Type: Point Type	Leave this field blank.
From this attribute: Object	Transaction.
From this attribute: Attribute	Transaction Points.
And/Or this value	Leave this section blank.

p. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	3.
Name	Update Incentive Choice.
Type	Update Attribute.
Update this attribute: Object	Member.

Field	Value
Update this attribute: Attribute	Select the Member attribute for the incentive choice. There are as many member attributes for incentive choices as the number of promotions that require enrollment. You must select the Member attribute for the incentive choice that contains the promotion number for the current promotion.
Update this attribute: Action	Set.
With this attribute: Object	Transaction.
With this attribute: Attribute	Select the Transaction attribute for the Promotion Incentive Choice.
And/Or this value	Leave this section blank.

Creating the Admin - Points Reactivation Promotion

Use this procedure to create the promotion.

To create the Admin - Points Reactivation promotion

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

Field	Value
Name	Points Reactivation.
Always Apply	N.
Apply To	Reactivation.
Admin	Select the Admin checkbox.
Program	Enter the name of the program.
Partner	Enter the name of the partner.
Product Inclusion	All Products.

Field	Value
Point Limit Type	Unlimited.
Promotion Start	Enter one day before today's date.
Promotion End	Leave this field blank.

3. Click the Promotion Number (#) field's hyperlink.
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	Pay without override
Apply To	Transactions

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

Field	Value
Sequence	1
Name	Override flag is N
Type	Compare to Values

   d. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Override Price Flag

Field	Value
Condition	Equals

e. Add a new record to the Values list and enter N in the Value field.
f. Click the Actions view tab.
g. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Update Amount
Type	Update Attribute.
Update this attribute: Object	Transaction.
Update this attribute: Attribute	Amount.
Update this attribute: Action	Set.
With this attribute: Object	Transaction.
With this attribute: Attribute	Amount.
And/Or this value	Leave this section blank.

h. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Reactivate Points
Type	Points Reactivation

Field	Value

Note: No additional detail is needed for this action.

6. Create the second rule for this promotion:
   a. Add a new record to the Rules list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Pay with override
Apply To	Transactions

   b. Click the Name field's hyperlink.
   c. Click the Criteria view tab.
   d. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Override flag is y
Type	Compare to Values

   e. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Override Price Flag
Condition	Equals

   f. Add a new record to the Values list and enter Y in the Value field.

g. Click the Actions view tab.
h. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1.
Name	Update Amount.
Type	Update Attribute.
Update this attribute: Object	Transaction.
Update this attribute: Attribute	Amount.
Update this attribute: Action	Set.
With this attribute: Object	Transaction.
With this attribute: Attribute	Amount.
And/Or this value	Leave this section blank.

i. Add another new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Reactivate Points
Type	Points Reactivation

Note: No additional detail is needed for this action.

Activating the Admin Promotions

Use this procedure to activate the promotions.

To activate the admin promotions

1. Navigate to the Loyalty Promotions Administration screen.
2. Select the promotions with the following names:
    - Admin - Accruals
    - Admin - Cancellation
    - Admin - Gift
    - Admin - Loan
    - Admin - Point Transfer
    - Admin - Redemptions
    - Admin - Voucher
    - Admin - Points Purchase
    - Admin - Transfer Points
    - Admin - Gift Points
    - Admin - Availment
    - Admin - Voucher Reissue
    - Admin - Bonus
    - Admin - Lounge Purchase
    - Admin - Membership Renewal
    - Admin - Enrollment
    - Admin - Manual Credit
    - Admin - Debit
    - Admin - Promotion Enrolment
    - Admin - Reactivating Points
3. Click Activate.

Modifying Loyalty Programs

Before you can modify a Loyalty Program, you must deactivate it.

> **Note:** You can keep running the cached Loyalty Program while you are modifying it. Once a batch engine's or real-time engine's cache is loaded, you can deactivate a Program or Promotion without impacting the actively running engine components. This cache is loaded when the engine components are started (batch component) or the first processing request is made (real-time component). Changes in the Program become available to users after you reactivate the program and click the Update Cache button.

To modify a loyalty program

1. Navigate to the Loyalty Program Administration screen, Programs view.

2. In the Programs list, in the record for the program you want to modify, clear the Active check box.
3. Modify the program as needed, using the same methods described in *Process of Setting Up Loyalty Programs*.
4. When you have made all needed changes, select the Active check box to activate the program again.
5. Click Update Cache.

About Tier Promotions

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.

The following examples assume that you have already set up a loyalty program with appropriate tiers. When you created these tiers, the Siebel Loyalty application automatically created the tier promotion record for them. For more information about creating tiers, see *Defining Tier Classes and Tiers*.

Tier promotions can use tier assessment models to specify the period of time used to assess a member's activities and determine whether or not a member is eligible for a tier change at the specified time.

Though it is possible for tier promotions to use tier assessment models to determine the qualifying period, it is also possible to use the older form of tier promotion that does not use tier assessment models.

The following topics include information about how to create tier promotions that use different tier assessment models and about how to create tier promotions that do not use tier assessment models:

- *About Tier Assessment Processes and Models*
- *Example of Creating an Anniversary Based Tier Assessment Model*
- *Example of Creating a Fixed Date Based Tier Assessment Model*
- *Example of Creating a Rolling Period Based Tier Assessment Model*
- *Example of Creating Tier Promotions without Tier Assessment Models*
- **Note:** Retroactive tier processing is not supported for the tier assessment models introduced in Siebel CRM 8.1, that is, the Anniversary Date, Fixed Date, and Rolling Period models. Retroactive tier processing is supported only for the older form of tier assessment models introduced in Siebel CRM version 8.0 and earlier releases.

About Tier Assessment Processes and Models

Members of loyalty programs earn qualifying and nonqualifying points based on their activities. Members can 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.

Tier Assessment is a process that assesses member's activities during a given qualifying period of time and determines whether or not a member is eligible for a tier change.

Tier assessment can be based on the following models:

- **Anniversary**. In this model, the qualifying period starts on the date that a member joins the loyalty program. The member's point balance is always reset to zero every year on the membership anniversary date.
- **Fixed date**. In this model, the qualifying period starts on a fixed date each year for all loyalty program members. The tier end dates are also fixed for all members. The balance of all the members in the loyalty program is reset to zero at the end of the qualifying period.

- **Rolling period**. In this model, the qualifying period of a member starts when the member enrolls into the program. The member is not assigned a qualifying period length. Once a member attains a higher tier, the member's tier is effective for a specified period from the date of attaining the new tier even if the rolling balance is not sufficient for the member to remain in the current tier. The member's point balance is never reset to zero in this model. Rather, the balance is calculated based on the past qualifying period.
- **Relationship Tier Assessment.** In this model, the relative of a member changes tiers when the member attains a specific tier. For example, if a member attains a Platinum Tier, then the member's relative automatically receives a Gold Tier.

Example of Creating an Anniversary Based Tier Assessment Model

You can create an anniversary based tier assessment model. In this model, the qualifying period starts on the date that a member joins the loyalty program. The member's point balance is always reset to zero every year on the membership anniversary date.

When you are creating an anniversary based tier assessment model, consider the following:

- All rules defined for this model are based on the current qualifying period balance and other member attributes.
- During the tier period, a member is allowed to upgrade to another tier. However, when the tier expires, the member can either remain in the same tier or be downgraded to another tier.
- Member's balances are reset only on a member's anniversary date.
- For member assessment purposes, point type balances are derived from the current active tier of the tier class.
- The new tier end date is always aligned with the enrollment date and takes into account the minimum tier length setup defined at the Tier Class level. The New Tier Start date is always the same as the tier change date.
- The qualifying period end date is maintained at the member's tier level in order to identify which qualifying period the current member's balance belongs to. This value is calculated based on attributes defined at the Tier Class level.

To create an anniversary based tier assessment model

1. Navigate to the Loyalty Program Administration screen.
2. In the Loyalty Programs list, select the program that the tiers are used by and click its Program Id hyperlink.
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	Description
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 might include standard set to 1, business class set to 2, first class set to 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 must be specified before activating the tier class.

Field	Description
Start Qual Period	Select **Enrollment Date/Anniversary Date for the Start Qual Period.**
Restart Qual Period	Select when the length of time for the new qualifying period starts after a tier status change. **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.
Start Tier Period	Select Enrollment/Anniversary Date for the Start Tier Period.
Min Tier Length and Min Tier Length Period	Enter the length and unit of measurement for this tier. For example, if the qualifying period is six months, then length is 6 and Period is Month.
Assessment Schedule Date	Enter the day and month to schedule a tier assessment for a tier class.
Recurring Period	Select how frequently the assessment schedule is repeated. Options are: o Monthly o Yearly

Note: The following steps are examples of some tier assessment rules.

5. Create a new rule for this Tier.
   a. In the Rules list, add a new record and enter the values in the following table.

Field	Value
Sequence	1
Name	Upgrade Rule
Apply To	Tiers

b. Click the Rule Name.

c. To create the first criterion, add a new record in the Criteria list, then complete the necessary fields in the Criteria list and the Compare to Values Details and Values forms, as shown in the following table.

Field	Value
Sequence	1
Name	Current QP Balance > 150000
Type of Comparison	Compare to Values
Object	Member Tier
Attribute	Points
Condition	Is Greater Than
Value	150000

d. Click the Actions view tab, then add a new record in the Actions list and complete the necessary fields in the Actions list and form as shown in the following table.

Field	Value
Sequence	1
Name	Upgrade Tier
Type	Upgrade Tier
New Tier	Enter the name of the new tier after the upgrade.

e. To create the second criterion, add a new record in the Criteria list, then complete the necessary fields in the Criteria list and the Compare to Values Details form and the Values form, as shown in the following table.

Field	Value
Sequence	2

Field	Value
Name	Is Expired
Type of Comparison	Compare to Values
Object	Member Tier
Attribute	Is Expired
Condition	Equals
Value	N

f. Click the Actions view tab and add a new record in the Actions list, then complete the necessary fields in the Actions list and form as shown in the following table.

Field	Value
Sequence	2
Name	Upgrade Tier
Type	Upgrade Tier
New Tier	Enter the name of the new tier after the upgrade.

6. Create another rule for this Tier.

a. In the Rules list, add a new record and enter the values in the following table.

Field	Value
Sequence	3
Name	Retain Rule
Apply To	Tiers

Field	Value

b. Click the Rule Name.

c. To create the first criterion, add a new record in the Criteria list, then complete the necessary fields in the Criteria list and the Compare to Values Details and Values forms, as shown in the following table.

Field	Value
Sequence	1
Name	Current QP Balance > 25000
Type of Comparison	Compare to Values
Object	Member Tier
Attribute	Points
Condition	Is Greater Than
Value	25000

d. Click the Actions view tab, add a new record in the Actions list, then complete the necessary fields in the Actions list and form as shown in the following table.

Field	Value
Sequence	1
Name	Requalify
Type	Requalify

e. To create the second criterion, add a new record in the Criteria list, then complete the necessary fields in the Criteria list and the Compare to Values Details and Values forms, as shown in the following table.

Field	Value
Sequence	2
Name	Is Expired
Type of Comparison	Compare to Values
Object	Member Tier
Attribute	Is Expired
Condition	Equals
Value	Y

f. Click the Actions view tab and add a new record in the Actions list, then complete the necessary fields in the Actions list and form as shown in the following table.

Field	Value
Sequence	2
Name	Requalify
Type	Requalify

7. Create another rule for this Tier.

a. In the Rules list, add a new record and enter the values in the following table.

Field	Value
Sequence	3
Name	Downgrade Rule
Apply To	Tiers

Field	Value

b. Click the Rule Name.

c. To create the first criterion, add a new record in the Criteria list, then complete the necessary fields in the Criteria list and the Compare to Values Details and Values forms, as shown in the following table.

Field	Value
Sequence	1
Name	Current QP Balance < 25000
Type of Comparison	Compare to Values
Object	Member Tier
Attribute	Points
Condition	Is Less Than
Value	25000

d. Click the Actions view tab and add a new record in the Actions list, tjem complete the necessary fields in the Actions list and form as shown in the following table.

Field	Value
Sequence	1
Name	Downgrade
Type	Downgrade
New Tier	Enter the name of the new tier after the downgrade.

e. To create the second criterion, add a new record in the Criteria list, then complete the necessary fields in the Criteria list and the Compare to Values Details and Values forms, as shown in the following table.

Field	Value
Sequence	2
Name	Is Expired
Type of Comparison	Compare to Values
Object	Member Tier
Attribute	Is Expired
Condition	Equals
Value	Y

f. Click the Actions view tab and add a new record in the Actions list, then complete the necessary fields in the Actions list and form as shown in the following table.

Field	Value
Sequence	2
Name	Downgrade
Type	Downgrade
New Tier	Enter the name of the new tier after the downgrade.

Example of Creating a Fixed Date Based Tier Assessment Model

You can create a fixed date based tier assessment model. In this model, the qualifying period starts on a fixed date each year for all loyalty program members. The tier end dates are also fixed for all members. The balance of all the members in the loyalty program is reset to zero at the end of the qualifying period.

When you are creating a fixed date based tier assessment model, consider the following:

- Upgrade rules are based on current qualifying period balances, while other rules are based on the last qualifying period balances.
- While a tier is valid, a member can be either upgraded or assessed. After the tier has expired, the member can either remain in the existing tier or be downgraded to a different tier.
- Current qualifying period balances are derived from the member's current active tier, while the last qualifying period balance is derived from the qualifying period balance history.
- The Stamp Future Tier flags future tier details if it is likely that a member will be downgraded based on the Tier Effective Period End Date.
- The New Tier End Date is always aligned with the Fixed Date attribute specified at the Tier Class level and considers the minimum tier period that is defined. New Tier Start Date is always the Tier Change Date.
- The Qual Period End Date is updated at the member's tier level in order to identify which qualifying period the member belongs to. This date is a fixed date that is calculated based on attributes defined at the Tier Class level.
- A member's balance for this tier class is reset in the new tier record if the record has been flagged either "Requalify Tier" or "Downgrade Tier." The balance is reset on every Qual Period End date as part of the update balance process.

To create a fixed date based tier assessment model

1. Navigate to the Loyalty Program Administration screen.
2. In the Loyalty Programs list, select the program that the tiers are in, and click its Program Id.
3. Click the Tier Classes view tab.
4. Add a new record to the Tier Classes list and complete the necessary fields. Some fields which are relevant for the fixed date model are described in the following table.

Field	Description
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 might include standard set to 1, business class set to 2, first class set to 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 must be specified before activating the tier class.
Start Qual Period	Select the following Start Qual Period: Fixed Date. The qualifying period starts on a specified date and continues for the length of time specified in the Tiers list.
Start Tier Period	Select Fixed Date.
Restart Qual Period	Select when the length of time for the new qualifying period starts after a tier status change.

Field	Description
	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.
Qual Period Length and Qual 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, then the length is 1 and UoM is Year. If the qualifying period is six months, then the length is 6 and UoM is Month.
Start Tier Date	This field is enabled only if Start Tier Period is Fixed Date. Enter the day and month that the tier starts.
End Tier Date	This field is enabled only if Start Tier Period is Fixed Date. Enter the day and month that the tier ends.
Min Tier Length and Min Tier Length Period	Enter the length and unit of measurement for this tier. For example, if the qualifying period is six months, then length is 6 and Period is Month.
Assessment Schedule Date	Enter the day and month to schedule a tier assessment for a tier class.
Recurring Period	Select how frequently the assessment schedule is repeated. Options are: o Monthly o Yearly

Note: The following steps are examples of some tier assessment rules.

5. Create a new rule for this Tier.
   a. In the Rules list, add a new record and enter the values in the following table.

Field	Value
Sequence	1
Name	Upgrade Rule
Apply To	Tiers

Field	Value

b. Click the Rule Name.

c. To create the first criterion, add a new record in the Criteria list, then complete the necessary fields in the Criteria list and the Compare to Values Details and Values forms, as shown in the following table.

Field	Value
Sequence	1
Name	Current QP Balance > 150000
Type of Comparison	Compare to Values
Object	Member Tier
Attribute	Points
Condition	Is Greater Than
Value	150000

d. Click the Actions view tab and add a new record in the Actions list, then complete the necessary fields in the Actions list and form as shown in the following table.

Field	Value
Sequence	1
Name	Upgrade Tier
Type	Upgrade Tier
New Tier	Enter the name of the new tier after the upgrade.

e. To create the second criterion, add a new record in the Criteria list, then complete the necessary fields in the Criteria list and the Compare to Values Details and Values forms, as shown in the following table.

Field	Value
Sequence	2
Name	Is Expired
Type of Comparison	Compare to Values
Object	Member Tier
Attribute	Is Expired
Condition	Equals
Value	N

f. Click the Actions view tab and add a new record in the Actions list, then complete the necessary fields in the Actions list and form as shown in the following table.

Field	Value
Sequence	2
Name	Upgrade Tier
Type	Upgrade Tier
New Tier	Enter the name of the new tier after the upgrade.

6. Create another rule for this Tier.

a. In the Rules list, add a new record and enter the values in the following table.

Field	Value
Sequence	1
Name	Future Downgrade Rule

Field	Value
Apply To	Tiers

b. Click the Rule Name.

c. To create the first criterion, add a new record in the Criteria list, then complete the necessary fields in the Criteria list and the Compare to Values Details and Values forms, as shown in the following table.

Field	Value
Sequence	1
Name	Last QP Balance < 25000
Type of Comparison	Compare to Values
Object	Member Tier
Attribute	Point
Condition	Is Less Than
Value	25000

d. Click the Actions view tab and add a new record in the Actions list, then complete the necessary fields in the Actions list and form as shown in the following table.

Field	Value
Sequence	1
Name	Assess Next Tier
Type	Assess Next Tier
New Tier	Enter the name of the future tier.

e. To create the second criterion, add a new record in the Criteria list, then complete the necessary fields in the Criteria list and the Compare to Values Details and Values forms, as shown in the following table.

Field	Value
Sequence	2
Name	Tier End Date - system date < 45 days
Type of Comparison	Compare to Values
Object	Member Tier
Attribute	Point
Condition	Is Less Than
Value	45

f. Click the Actions view tab and add a new record in the Actions list, then complete the necessary fields in the Actions list and form as shown in the following table.

Field	Value
Sequence	2
Name	Assess Next Tier
Type	Assess Next Tier
New Tier	Enter the name of the future tier.

7. Create another rule for this Tier.

a. In the Rules list, add a new record and enter the values in the following table.

Field	Value
Sequence	3

Field	Value
Name	Retain Rule
Apply To	Tiers

b. Click the Rule Name.

c. To create the first criterion, add a new record in the Criteria list, then complete the necessary fields in the Criteria list and the Compare to Values Details and Values forms, as shown in the following table.

Field	Value
Sequence	1
Name	Last QP Balance > 25000
Type of Comparison	Compare to Values
Object	Member Tier
Attribute	Points
Condition	Is Greater Than
Value	25000

d. Click the Actions view tab and add a new record in the Actions list, then complete the necessary fields in the Actions list and form as shown in the following table.

Field	Value
Sequence	1
Name	Requalify Tier
Type	Requalify Tier

e. To create the second criterion, add a new record in the Criteria list, then complete the necessary fields in the Criteria list and the Compare to Values Details and Values forms, as shown in the following table.

Field	Value
Sequence	2
Name	Is Expired
Type of Comparison	Compare to Values
Object	Member Tier
Attribute	Is Expired
Condition	Equals
Value	Y

f. Click the Actions view tab and add a new record in the Actions list, then complete the necessary fields in the Actions list and form as shown in the following table.

Field	Value
Sequence	2
Name	Requalify Tier
Type	Requalify Tier

Example of Creating a Rolling Period Based Tier Assessment Model

You can create a rolling period based tier assessment model. In this model, the qualifying period of a member starts when the member enrolls into the program. The member is not assigned a qualifying period length. Once a member attains a higher tier, the member's tier is effective for a specified period from the date of attaining the new tier even if the rolling balance is not sufficient for the member to remain in the current tier. The member's point balance is never reset to zero in this model. Rather, the balance is calculated based on the past qualifying period.

When you are creating a rolling period based tier assessment model, consider the following:

- When you are defining attributes at the Tier Class level, the Qualifying Period length, which is used to display the balance on the member user interface, is same as the Rolling Period length.
- All rules in this model are based on the running balance and member attributes.
- While a Tier is valid, a member can be upgraded. After the tier has expired, a member can either remain in the existing tier or be downgraded to another tier.
- While running balances be loaded into Siebel Loyalty, a separate API calculates and sources running balances by extracting data from Accrual Items.
- The New Tier End Date is calculated based on the Rolling period attribute defined at the Tier Class level. The New Tier Start Date is always the same as the Tier Change Date.
- The Qual Period End Date attribute is not maintained in this model.
- Balances are not maintained at the Tier Class level in this model.

To create a rolling period based tier assessment model

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

Field	Description
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 might include standard set to 1, business class set to 2, first class set to 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 must be specified before activating the tier class.
Start Qual Period	Select when the qualifying period starts. The options is: Rolling. The qualifying period starts on the day the member enrolls and continues for a specified period.
Qual Period Length and Qual 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, then the length is 1 and UoM is Year. If the qualifying period is six months, then length is 6 and UoM is Month.
Assessment Schedule Date	Enter the day and month to schedule a tier assessment for a tier class.
Recurring Period	Select how frequently the assessment schedule is repeated.

Field	Description
	Options are: o Monthly o Yearly

Note: The following steps are examples of some tier assessment rules.

5. Create a new rule for this tier.
   a. In the Rules list, add a new record and enter the values in the following table.

Field	Value
Sequence	1
Name	Upgrade Rule
Apply To	Tiers

   b. Click the Rule Name.
   c. To create the first criterion, add a new record in the Criteria list, and complete the necessary fields in the Criteria list and the Compare to Values Details, and Values forms, as shown in the following table.

Field	Value
Sequence	1
Name	Running balance of last n days > 150000
Type of Comparison	Compare to Values
Object	Member Tier
Attribute	Points
Condition	Is Greater Than
Value	150000

d. Click the Actions view tab and add a new record in the Actions list, and complete the necessary fields in the Actions list and form, as shown in the following table.

Field	Value
Sequence	1
Name	Upgrade Tier
Type	Upgrade Tier

e. To create the second criterion, add a new record in the Criteria list, and complete the necessary fields in the Criteria list and the Compare to Values Details, and Values forms, as shown in the following table.

Field	Value
Sequence	2
Name	Is Expired
Type of Comparison	Compare to Values
Object	Member Tier
Attribute	Is Expired
Condition	Equals
Value	N

f. Click the Actions view tab and add a new record in the Actions list, and complete the necessary fields in the Actions list and form, as shown in the following table.

Field	Value
Sequence	2
Name	Upgrade Tier

Field	Value
Type	Upgrade Tier
New Tier	Enter the name of the new tier after the upgrade.

6. Create another rule for this tier.
   a. In the Rules list, add a new record and enter the values in the following table.

Field	Value
Sequence	2
Name	Retain Rule
Apply To	Tiers

   b. Click the Rule Name.
   c. To create the first criterion, add a new record in the Criteria list, and complete the necessary fields in the Criteria list and the Compare to Values Details, and Values forms, as shown in the following table.

Field	Value
Sequence	1
Name	Running Balance of last n days > 150000
Type of Comparison	Compare to Values
Object	Member Tier
Attribute	Points
Condition	Is Greater Than
Value	150000

d. Click the Actions view tab and add a new record in the Actions list, and complete the necessary fields in the Actions list and form, as shown in the following table.

Field	Value
Sequence	1
Name	Requalify
Type	Requalify

e. To create the second criterion, add a new record in the Criteria list, and complete the necessary fields in the Criteria list and the Compare to Values Details, and Values forms, as shown in the following table.

Field	Value
Sequence	2
Name	Is Expired
Type of Comparison	Compare to Values
Object	Member Tier
Attribute	Is Expired
Condition	Equals
Value	Y

f. Click the Actions view tab and add a new record in the Actions list, and complete the necessary fields in the Actions list and form, as shown in the following table.

Field	Value
Sequence	1
Name	Requalify

Field	Value
Type	Requalify

7. Create another rule for this tier.

   a. In the Rules list, add a new record and enter the values in the following table.

Field	Value
Sequence	3
Name	Downgrade Rule
Apply To	Tiers

   b. Click the Rule Name.
   c. To create the first criterion, add a new record in the Criteria list, and complete the necessary fields in the Criteria list and the Compare to Values Details, and Values forms, as shown in the following table.

Field	Value
Sequence	1
Name	Running Balance of last n days < 150000
Type of Comparison	Compare to Values
Object	Member Tier
Attribute	Points
Condition	Is Less Than
Value	150000

   d. Click the Actions view tab and add a new record in the Actions list, and complete the necessary fields in the Actions list and form, as shown in the following table.

Field	Value
Sequence	1
Name	Downgrade Tier
Type	Downgrade Tier
New Tier	Enter the name of the new tier after the downgrade.

e. To create the second criterion, add a new record in the Criteria list, and complete the necessary fields in the Criteria list and the Compare to Values Details, and Values forms, as shown in the following table.

Field	Value
Sequence	2
Name	Is Expired
Type of Comparison	Compare to Values
Object	Member Tier
Attribute	Is Expired
Condition	Equals
Value	Y

f. Click the Actions view tab and add a new record in the Actions list, and complete the necessary fields in the Actions list and form, as shown in the following table.

Field	Value
Sequence	1
Name	Downgrade Tier

Field	Value
Type	Downgrade Tier
New Tier	Enter the name of the new tier after the downgrade.

Example of Creating Tier Promotions without Tier Assessment Models

This example shows you how to create the rules for tier promotions that do not use tier assessment models. It shows one possible use of tier promotions. Your use of these promotions can differ, depending on your business model.

Siebel Loyalty supports tier assessment models that let you determine the period of time used to assess tier changes. For more information, see *About Tier Promotions* . It is also possible to use the older form of tier assessment promotion that does not use tier assessment models. This topic gives an example of that older form of promotion.

In this airline example, the customer can qualify for a tier change in two ways:

- By accumulating 250,000 regular points.
- By completing 60 flight segments.

To track this customer behavior, you use two different point types, one representing the regular points that members earn based on their purchases and one representing the number of flight segments that members take.

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

To create a tier promotion, perform the following tasks:

- *Creating Two Types of Points*
- *Creating a Rule for the Base Tier for One Typeof Point*
- *Creating a Rule for the Base Tier for the Second Type of Point*
- *Creating Additional Rules for the Base Tiers*

Creating Two Types of Points

Start by creating two types of points, one to represent the standard points that customers get based on their purchases, the other to represent the number of flight segments that customers have completed.

To create two types of points

1. Navigate to the Loyalty Program Administration screen.
2. Click the Program Id field of the desired program.
3. Click the Point Types view tab.
4. In the Point Types list, create the standard points by adding a new record entering the values in the following table.

Field	Value
Name	Regular
Active	Y
Field to Use	Point 1 Value
Qualifying Weight	0.5
Non-Qualifying Weight	0.4

5. In the Point Types list, create the points used to track flight segments completed by adding a new record entering the values in the following table.

Field	Value
Name	Tier Qualification
Active	Y
Field to Use	Point 2 Value
Qualifying Weight	1
Non-Qualifying Weight	1

Creating a Rule for the Base Tier for One Type of Point

The first rule promotes members from the base tier to the platinum tier if they earn the required number of regular points.

To create rules for the base tier for one type of point

1. Navigate to the Loyalty Promotions Administration screen.
2. Click the Promotion Number (#) field of the tier promotion that was created automatically when you created the tier.
3. 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	250,000 Points & Not Expired - Upgrade to Platinum
Apply To	Tiers

4. Click the Rule Name.
5. To create the first criterion, add a new record in the Criteria list, and complete the necessary fields in the Criteria list and the Compare to Values Details and Values forms as shown in the following table.

   Note: This first criterion means that the rule applies if the member has over 250,000 regular points.

Field	Value
Sequence	1
Name	Greater Than or Equal To 250,000 Regular Points
Type of Comparison	Compare to Values
Object	Member Tier
Attribute	Regular Points
Condition	Is Greater Than or Equal To
Value	250000

6. To create the second criterion, add a new record in the Criteria list, and complete the necessary fields in the Criteria list and the Compare to Values Details, and Values forms, as shown in the following table.

Field	Value
Sequence	2
Name	Not Expired

Field	Value
Type of Comparison	Compare to Values
Object	Member Tier
Attribute	Is Expired
Condition	Equals
Value	N

Note: This criterion means the rule applies only if the active Tier has not yet expired.

7. To enter the action for this rule, click the Actions view tab.
8. Add a new record in the Actions list, and complete the necessary fields in the Actions list and form, as shown in the following table.

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

Creating a Rule for the Base Tier for the Second Type of Point

The second rule promotes members from the base tier to the platinum tier if they have completed the required number of flight segments. Remember that you created the point type named Tier Qualification Points to track the flight segments that members complete.

To create rules for the base tier for another type of point

1. Navigate to the Loyalty Promotions Administration screen and click the Promotion # field of the tier promotion.
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	2
Name	60 Flight Segments - Upgrade to Platinum
Apply To	Tiers

3. Click the Rule Name.
4. To create the first criterion, add a new record in the Criteria list, and complete the necessary fields in the Criteria list and the Compare to Values Details, and Values forms, as shown in the following table.

Field	Value
Sequence	1
Name	Greater Than or Equal To 60 Tier Qualification Points
Type of Comparison	Compare to Values
Object	Member Tier
Attribute	Tier Qualification Points
Condition	Is Greater Than or Equal To
Value	60

Note: This first criterion means that the rule applies if the member has over 250,000 regular points.

5. To create the second criterion, add a new record in the Criteria list, and complete the necessary fields in the Criteria list and the Compare to Values Details, and Values forms, as shown in the following table. This criterion is the same as the third criterion for the previous rule.

Field	Value
Sequence	2
Name	Not Expired

Field	Value
Type of Comparison	Compare to Values
Object	Member Tier
Attribute	Is Expired
Condition	Equals
Value	N

Note: This criterion means the rule applies only if the active tier has not yet expired.

6. To enter the action for this rule, click the Actions view tab.
7. Add a new record in the Actions list, and complete the necessary fields in the Actions list and form, as shown in the following table. This action is the same action as the previous rule.

Field	Value
Sequence	3
Name	Upgrade to Platinum
Type	Upgrade Tier
New Tier	Platinum

Creating Additional Rules for the Base Tiers

Now that you have finished creating two rules to upgrade members to the platinum tier, you must also create additional rules to automatically Upgrade to other tiers, manually upgrade to other tiers and manually Qualify for Base.

For example, if your loyalty program's tier class has 4 tiers Base, Silver, Gold and Platinum, Base tier being the lowest tier, then you must additionally create the following rules for the base tier, in the following sequence:

- 120k Points & Not Expired - Upgrade to Gold, sequence 3
- 40 Flight Segments - Upgrade to Gold, sequence 4
- 60k Points & Not Expired - Upgrade to Silver, sequence 5
- 20 Flight Segments - Upgrade to Silver, sequence 6

- Base Expired, Qualify Base, sequence 7
- Manual Upgrade to Silver, sequence 8
- Manual Upgrade to Gold, sequence 9
- Manual Upgrade to Platinum, sequence 10
- Manual Qualify Base, sequence 11

Creating Additional Rules for the Other Tiers

Additional rules are needed for other tiers that are not the lowest tier.

For example, the Silver Tier requires the following types of rules:

- Automatic Upgrade
- Qualify for same tier
- Requalify
- Downgrade
- Manual Upgrade
- Manual downgrade
- Manual Qualify Tier

Following would be the sequence of setting up these rules (assuming points and flights as criteria for tier qualification):

1. 250,000 Points & Not Expired - Upgrade to Platinum
2. 60 flight segments - Upgrade to Platinum
3. 120,000 Points & Not Expired - Upgrade to Gold
4. 40 flight segments - Upgrade to Gold
5. 60,000 Points and Not expired - Qualify for Silver
6. In Qual Period and Expire - Requalify Silver
7. Downgrade to Base
8. Manual Upgrade to Gold
9. Manual Upgrade to Platinum
10. Manual Downgrade to Base
11. Manual Qualify Tier

If you are not sure about the details for all of these rules, then see the Loyalty demonstration application.

Creating a Relationship Assessment Rule

You can optionally create a relationship assessment rule that allows the relative of a member to automatically receive a new tier whenever the member attains a specific tier.

The relationship between members can exist at the contact level before the referral enrollment or can be created during the referral enrollment.

Note: The member's relative must be a current member.

To create a relationship assessment rule

1. Navigate to the Loyalty Promotions Administration screen and click the Promotion Number (#) field of the tier promotion.

2. Click the Actions view tab.
3. Add a new record in the Actions list, and complete the necessary fields in the Actions list and form, as shown in the following table. This action is the same action as the previous rule.

Field	Value
Sequence	Enter the sequence number.
Name	Upgrade Relationship Tier
Type	Upgrade Relationship Tier
Relationship Type	Select the relationship type.
New Tier	Select the new Tier.

About Retroactive Tier Changes

There are circumstances where member transactions are not immediately received or processed by a loyalty program. During this period of time, a member's qualifying period might have ended and the member might have been downgraded to a lower tier, or the late transaction could have upgraded the member to a higher tier. Retroactive tier changes optionally allow processing of late transactions to give points and, if needed, change a member's tier status, thereby enabling Siebel Loyalty to accurately calculate the member's future accruals.

Note: Retroactive tier processing is not supported for the tier assessment models introduced in Siebel CRM version 8.1, that is, the Anniversary Date, Fixed Date, and Rolling Period models. Retroactive tier processing is supported only for the older form of tier assessment models introduced in Siebel CRM version 8.0 and earlier releases.

For example, say that a loyalty program requires 60,000 points for a member to retain a silver tier status. However, by the end of the qualifying period, the member only has 55,000 points officially recorded. After downgrading the member, it turns out that there was an unprocessed transaction for 10,000 points dated within the qualifying period. If it had been processed according to the transaction date, then the member would have accumulated 65,000 points by the end of the qualifying period. This would have been sufficient to maintain the silver tier. Instead, the points would have been processed too late, and so the member would be credited with having 10,000 points in the base tier.

Now, a late transaction can be processed in the same way as if it was processed during the qualifying period. In this example, this late transaction increased the qualifying points for the member to 65,000 and entitled the member to remain in the silver tier for another year. The member's points, however, are still reset to 0 after the retroactive tier change.

Related Topic

Example of Setting Up Retroactive Tier Changes

Example of Setting Up Retroactive Tier Changes

Setting up a retroactive tier program requires adding additional program level attributes, defining additional tier rules, and adding an additional Admin - Retro Accrual promotion. These configurations determine whether or not retroactive changes are applied to transactions.

Creating Retroactive Tier Member Attributes

The tier class qualifying period member attributes are used to specify the current and previous qualifying period of a member for a particular tier class. These attributes determine whether or not retroactive tier logic must apply to a transaction.

Every tier class that is eligible for retroactive tier changes needs the following three member attributes defined:

- **TC1 Previous QP Start.** For tier class 1, this attribute is the start date of the previous qualifying period.
- **TC1 Current QP Start.** For tier class 1, this attribute is the start date of the current qualifying period.
- **TC1 Current QP End.** For tier class 1, this attribute is the end date of the current qualifying period.

To create retroactive tier member attributes

1. Navigate to the Loyalty Program Administration screen.
2. Locate the program that the attribute applies to and click its Program Id hyperlink.
3. Clear the program form's Active check box.
4. Click the Program Level Attributes view tab.
5. In the link bar of the Program Level Attributes view, click Member Attributes.
6. Add the first record to the Program Level Attributes list, and complete the necessary fields. Some fields are described in the following table.

Field	Value
Name	TC1 Previous QP Start
Data Type	Date
Display to User	No

7. Add the second record to the Program Level Attributes list, and complete the necessary fields. Some fields are described in the following table.

Field	Value
Name	TC1 Current QP Start
Data Type	Date

Field	Value
Display to User	No

8. Add the third record to the Program Level Attributes list, and complete the necessary fields. Some fields are described in the following table.

Field	Value
Name	TC1 Current QP End
Data Type	Date
Display to User	No

9. Repeat the steps in this procedure to add these attributes to each tier class and select the Active check box to activate the attributes.
10. When you are finished creating all attributes for the program, select the program form's Active check box to activate the program.

Creating Retroactive Tier Member Tier Attributes

These attributes are used to distinguish a retroactive tier change from a regular tier change.

To create retroactive tier member tier attributes

1. Navigate to the Loyalty Program Administration screen.
2. Locate the program that the attribute applies to and click its Program Id hyperlink.
3. Clear the program form's Active check box.
4. Click the Program Level Attributes view tab.
5. In the link bar of the Program Level Attributes view, click Member Tier Attributes.
6. Add a record to the Program Level Attributes list, and complete the necessary fields. Some fields are described in the following table.

Field	Value
Name	Tier Approval Status
Field	Tier Approval Status
Read Only	Y

Field	Value
Data Type	String
Pick List	LOY Member Tier Approval Status Picklist

7. Add another record to the Program Level Attributes list, and complete the necessary fields. Some fields are described in the following table.

Field	Value
Name	Transaction Sub Type LIC
Field	Transaction Sub Type LIC
Read Only	Y
Data Type	String

8. When you are finished creating all attributes for the program, select the Active check box to activate the attributes and then select the program form's Active check box to activate the program.

Creating Retroactive Tier Transaction Attributes

These attributes are used to identify the date of the transaction, the current date in Siebel Loyalty, the age of the transaction and determines whether or not any retroactive tier action must be taken.

To create retroactive tier transaction attributes

1. Navigate to the Loyalty Program Administration screen.
2. Locate the program that the attribute applies to and click its Program Id hyperlink.
3. Clear the program form's Active check box.
4. Click the Program Level Attributes view tab.
5. In the link bar of the Program Level Attributes view, click Transaction Attributes.
6. Add a record to the Program Level Attributes list, and complete the necessary fields. Some fields are described in the following table.

Field	Value
Name	Transaction Age

Field	Value
Field	Transaction Age
Read Only	Select the Read Only check box
Data Type	Number

7. Add another record to the Program Level Attributes list, and complete the necessary fields. Some fields are described in the following table.

Field	Value
Name	Is Qualifying
Field	Qualifying Flag
Read Only	Select the Read Only check box
Data Type	String

8. Add another record to the Program Level Attributes list, and complete the necessary fields. Some fields are described in the following table.

Field	Value
Name	Current Date
Field	Current Date
Read Only	Select the Read Only check box
Data Type	Date

9. Add another record to the Program Level Attributes list, and complete the necessary fields. Some fields are described in the following table.

Field	Value
Name	Transaction Date

Field	Value
Field	Transaction Date
Read Only	Y
Data Type	Date

10. When you are finished creating all attributes for the program, select the Active check box to activate the attributes and then select the program form's Active check box to activate the program.

Setting Up Retroactive Tier Rules

The retroactive tier logic requires additional rules to evaluate member records and determine if a tier change is necessary.

For the given example for the Base Tier, the following would be the new sequence of rules (assuming only points as the criterion for Tier qualification):

1. Manual Tier Approval
2. Retro Tier Automatic Activation
3. 250,000 Points, Upgrade Platinum Retro
4. 250,000 Points & Not Expired - Upgrade to Platinum
5. 120,000 Points, Upgrade Gold Retro
6. 120,000 Points & Not Expired - Upgrade to Gold
7. 60,000 Points, Upgrade Silver Retro
8. 60,000 Points & Not Expired - Upgrade to Silver
9. Expired Cancellation Retro
10. Base Expired, Qualify Base
11. Manual Upgrade to Silver
12. Manual Upgrade to Gold
13. Manual Upgrade to Platinum
14. Manual Qualify Base

The additional rules having sequence numbers 1, 2, 3, 9 and the modified rule with sequence number 10 are explained in the following procedure.

To set up retroactive tier rules

1. Navigate to the Loyalty Program Administration screen.
2. In the Loyalty Programs list, select the program that the tiers are used by and click its Program Id hyperlink.
3. Click the Tier Classes view tab.
4. Select the tier class to be modified.
5. In the Tiers view, click the Tier Id hyperlink.
6. Click Modify.
7. Create a new rule for this Tier:
    a. In the Rules list, add a new record and enter the values in the following table.

Field	Value
Sequence	1
Name	Manual Tier Approval
Apply To	Tiers

b. Click the Rule Name.

c. To create the first criterion, add a new record in the Criteria list, and complete the necessary fields in the Criteria list and the Compare to Values Details, and Values forms, as shown in the following table.

Field	Value
Sequence	1
Name	Check Tier Approval
Type of Comparison	Compare to Values
Object	Member Tier
Attribute	Tier Approval Status
Condition	Equals
Value	Pending
Value	Pending RT Decision

d. Click the Actions view tab and add a new record in the Actions list, and complete the necessary fields in the Actions list and form, as shown in the following table.

Field	Value
Sequence	1
Name	Qualify Tier

Field	Value
Type	Qualify Tier

e. Add a new record in the Actions list, and complete the necessary fields in the Actions list and form, as shown in the following table.

Field	Value
Sequence	2
Name	CreateQualPeriodAttributes
Type	Invoke Custom Action
Method	CreateQualPeriodAttrib

8. Create the second rule for this Tier.

a. In the Rules list, add a new record and enter the values in the following table.

Field	Value
Sequence	2
Name	Retro Tier Automatic Activation
Apply to	Tiers

b. Click the Rule Name.
c. To create the first criterion, add a new record in the Criteria list, and complete the necessary fields in the Criteria list and the Compare to Values Details, and Values forms, as shown in the following table.

Field	Value
Sequence	1
Name	Check Tier Approval

Field	Value
Type of Comparison	Compare to Value
Object	Member Tier
Attribute	Tier Approval Status
Condition	Equals
Value	RTCINT - To Be Activated

d. Click the Actions view tab and add a new record in the Actions list, and complete the necessary fields in the Actions list and form, as shown in the following table.

Field	Value
Sequence	1
Name	Qualify Tier
Type	Qualify Tier

9. Create the third rule for this Tier.

a. In the Rules list, add a new record and enter the values in the following table.

> **Note:** The values used in this procedure are for illustration purposes only. Your values might vary depending on your configuration.

Field	Value
Sequence	3
Name	250,000 points - Upgrade Platinum Retro
Apply to	Tiers

b. Click the Rule Name.

c. To create the first criterion, add a new record in the Criteria list, and complete the necessary fields in the Criteria list and the Compare to Values Details, and Values forms, as shown in the following table.

Field	Value
Sequence	1
Name	Greater Than or Equal To 250,000 Regular Points
Type of Comparison	Compare to Values
Object	Member Tier
Attribute	Regular Points
Condition	Is Greater Than or Equal To
Value	250000

d. To create the second criterion, add a new record in the Criteria list, and complete the necessary fields in the Criteria list and the Compare to Values Details, and Values forms, as shown in the following table.

Field	Value
Sequence	2
Name	Check Tier Approval Status
Type of Comparison	Compare to Values
Object	Member Tier
Attribute	Tier Approval Status
Condition	Equals
Value	Pending - RTC
Value	RTCINT - Automatic

Field	Value

e. Click the Actions view tab and add a new record in the Actions list, and complete the necessary fields in the Actions list and form, as shown in the following table.

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

10. Create the fourth rule for this tier.

a. In the Rules list, add a new record and enter the values in the following table.

Field	Value
Sequence	9
Name	Expired - Cancellation Retro
Apply to	Tiers

b. Click the Rule Name.
c. To create the first criterion, add a new record in the Criteria list, and complete the necessary fields in the Criteria list and the Compare to Values Details, and Values forms, as shown in the following table.

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

Field	Value
Object	Member Tier
Attribute	Is Expired
Condition	Equals
Value	Y

d. To create the second criterion, add a new record in the Criteria list, and complete the necessary fields in the Criteria list and the Compare to Values Details, and Values forms, as shown in the following table.

Field	Value
Sequence	2
Name	Check Transaction Sub Type LIC
Type of Comparison	Compare to Values
Object	Member Tier
Attribute	Transaction Sub Type LIC
Condition	Equals
Value	Cancellation

e. To create the third criterion, add a new record in the Criteria list, and complete the necessary fields in the Criteria list and the Compare to Values Details, and Values forms, as shown in the following table.

Field	Value
Sequence	3
Name	Check Tier Approval
Type of Comparison	Compare to Values

Field	Value
Object	Member Tier
Attribute	Tier Approval Status
Condition	Equals
Value	Pending - RTC
Value	RTCINT - Automatic

f. Click the Actions view tab and add a new record in the Actions list, and complete the necessary fields in the Actions list and form, as shown in the following table.

Field	Value
Sequence	1
Name	Qualify (Tier Name)
Type	Qualify Tier

11. Create the fifth rule for this tier.

a. In the Rules list, add a new record and enter the values in the following table.

Field	Value
Sequence	10
Name	Tier Expired, Qualify (Tier Name)
Apply to	Tiers

b. Click the Rule Name.
c. To create the first criterion, add a new record in the Criteria list, and complete the necessary fields in the Criteria list and the Compare to Values Details, and Values forms, as shown in the following table.

Field	Value
Sequence	1
Name	Is Expired
Type of Comparison	Compare to Values
Object	Member Tier
Attribute	Is Expired
Condition	Equals
Value	Y

d. To create the second criterion, add a new record in the Criteria list, and complete the necessary fields in the Criteria list and the Compare to Values Details, and Values forms, as shown in the following table.

Field	Value
Sequence	2
Name	Check Tier Approval Status
Type of Comparison	Compare to Values
Object	Member Tier
Attribute	Tier Approval Status
Condition	Equals
Value	Automatic
Value	Manual - Approved

Field	Value
Value	RTC - Manual - Approved

e. Click the Actions view tab and add a new record in the Actions list, and complete the necessary fields in the Actions list and form, as shown in the following table.

Field	Value
Sequence	1
Name	Qualify (Tier Name)
Type	Qualify Tier

12. If your loyalty program has different sets of tiers for different customers, then repeat the steps in this procedure until you have modified all of the sets of tiers in the program.

Creating the Admin - Retro Accruals Base Promotion

When you define a Retroactive Tier program, you must create the Admin - Retro Accruals base promotion to determine the type of retroactive tier logic that is used.

Note: The rules for the Admin- Retro Accruals promotion are for illustration purposes only. Actual implementation requirements can vary. If you decide you do no want to use retroactive tier logic, then you can deactivate this base promotion.

To create the Admin - Retro Accruals base promotion

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

Field	Value
Name	Admin - Retro Accruals
Always Apply	Y
Apply To	Accrual-Product
Program	Enter the name of the program.

Field	Value
Partner	Enter the partners for the program.
Product Inclusion	All Products
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 Number (#) field's hyperlink.
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	Retro Txns 1 month ago A
Apply To	Transactions

   b. Click the Name field's hyperlink.
   c. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Check Txn Points
Type of Comparison	Compare to Values

   d. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Transaction Points
Condition	Is Greater Than

e. Add a new record to the Values list and enter 0 in the Value field.
f. Add another new record to the Criteria list, and enter the values in the following table.

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

g. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Is Qualifying
Condition	Equals

h. Add a new record to the Values list and enter Y in the Value field.
i. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	3
Name	Transaction Age < 1 Month

Field	Value
Type of Comparison	Compare to Values

j. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Transaction Age
Condition	Is Less Than

k. Add a new record to the Values list and enter 30 in the Value field.
l. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	4
Name	TC1 Previous QP Start < Txn Date
Type of Comparison	Compare to Object

m. In the Compare to Object Detail form, enter the values in the following table.

Section	Field	Value
Compare this Object		
Compare this object	Object	Member
Compare this object	Attribute	TC1 Previous QP Start
Compare this object	Condition	Is Less Than
To this object	Object	Transaction

Section	Field	Value
To this object	Attribute	Transaction Date

n. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	5
Name	TC2 Previous QP Start < Txn Date
Type of Comparison	Compare to Object

o. In the Compare to Object Detail form, enter the values in the following table.

Section	Field	Value
Compare this object	Object	Member
Compare this object	Attribute	TC2 Previous QP Start
Compare this object	Condition	Is Less Than
To this object	Object	Transaction
To this object	Attribute	Transaction Date

p. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	6
Name	TC1 Current QP End, Txn Date
Type of Comparison	Compare to Object

q. In the Compare to Object Detail form, enter the values in the following table.

Section	Field	Value
Compare this object	Object	Member
Compare this object	Attribute	TC1 Current QP End
Compare this object	Condition	Is Greater Than
To this object	Object	Transaction
To this object	Attribute	Transaction Date

r. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	7
Name	TC1 Current QP End < Today
Type of Comparison	Compare to Object

s. In the Compare to Object Detail form, enter the values in the following table.

Section	Field	Value
Compare this object	Object	Member
Compare this object	Attribute	TC1 Current QP End
Compare this object	Condition	Is Less Than
To this object	Object	Transaction
To this object	Attribute	Current Date

t. Click the Actions view tab.
u. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	RTC Automatic
Type	RTC Automatic

6. Create the second rule for this promotion:

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

Field	Value
Sequence	2
Name	Retro Txns 1 Month Ago B
Apply To	Transactions

b. Click the Name field's hyperlink.
c. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Check Txn Points
Type of Comparison	Compare to Values

d. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction

Field	Value
Attribute	Transaction Points
Condition	Is Greater Than

e. Add a new record to the Values list and enter 0 in the Value field.
f. Add another new record to the Criteria list, and enter the values in the following table.

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

g. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Is Qualifying
Condition	Equals

h. Add a new record to the Values list and enter Y in the Value field.
i. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	3
Name	Transaction Age < 1 Month
Type of Comparison	Compare to Values

j. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Transaction Age
Condition	Is Less Than

k. Add a new record to the Values list and enter 30 in the Value field.

l. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	4
Name	TC1 Previous QP Start < Txn Date
Type of Comparison	Compare to Object

m. In the Compare to Object Detail form, enter the values in the following table.

Section	Field	Value
Compare this object	Object	Member
Compare this object	Attribute	TC1 Previous QP Start
Compare this object	Condition	Is Less Than
To this object	Object	Transaction
To this object	Attribute	Transaction Date

n. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	5
Name	TC2 Previous QP Start < Txn Date
Type of Comparison	Compare to Object

o. In the Compare to Object Detail form, enter the values in the following table.

Section	Field	Value
Compare this object	Object	Member
Compare this object	Attribute	TC2 Previous QP Start
Compare this object	Condition	Is Less Than
To this object	Object	Transaction
To this object	Attribute	Transaction Date

p. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	6
Name	TC2 Current QP End, Txn Date
Type of Comparison	Compare to Object

q. In the Compare to Object Detail form, enter the values in the following table.

Section	Field	Value
Compare this object	Object	Member

Section	Field	Value
Compare this object	Attribute	TC2 Current QP End
Compare this object	Condition	Is Greater Than
To this object	Object	Transaction
To this object	Attribute	Transaction Date

r. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	7
Name	TC2 Current QP End < Today
Type of Comparison	Compare to Object

s. In the Compare to Object Detail form, enter the values in the following table.

Section	Field	Value
Compare this object	Object	Member
Compare this object	Attribute	TC2 Current QP End
Compare this object	Condition	Is Less Than
To this object	Object	Transaction
To this object	Attribute	Current Date

t. Click the Actions view tab.

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

Field	Value
Sequence	1
Name	RTC Automatic
Type	RTC Automatic

7. Create the third rule for this promotion:
   a. Add a new record to the Rules list, and enter the values in the following table.

Field	Value
Sequence	3
Name	Retro Txns 1 month ago C
Apply To	Transactions

   b. Click the Name field's hyperlink.
   c. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Check Txn Points
Type of Comparison	Compare to Values

   d. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Transaction Points

Field	Value
Condition	Is Greater Than

e. Add a new record to the Values list and enter 0 in the Value field.
f. Add another new record to the Criteria list, and enter the values in the following table.

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

g. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Is Qualifying
Condition	Equals

h. Add a new record to the Values list and enter Y in the Value field.
i. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	3
Name	Transaction Age < 1 Month
Type of Comparison	Compare to Values

j. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Transaction Age
Condition	Is Less Than

k. Add a new record to the Values list and enter 30 in the Value field.

l. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	4
Name	TC1 Previous QP Start < Txn Date
Type of Comparison	Compare to Object

m. In the Compare to Object Detail form, enter the values in the following table.

Section	Field	Value
Compare this object	Object	Member
Compare this object	Attribute	TC1 Previous QP Start
Compare this object	Condition	Is Less Than
To this object	Object	Transaction
To this object	Attribute	Transaction Date

n. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	5

Field	Value
Name	TC2 Previous QP Start < Txn Date
Type of Comparison	Compare to Object

o. In the Compare to Object Detail form, enter the values in the following table.

Section	Field	Value
Compare this object	Object	Member
Compare this object	Attribute	TC2 Previous QP Start
Compare this object	Condition	Is Less Than
To this object	Object	Transaction
To this object	Attribute	Transaction Date

p. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	6
Name	TC1 Current QP Start, Txn Date
Type of Comparison	Compare to Object

q. In the Compare to Object Detail form, enter the values in the following table.

Section	Field	Value
Compare this object	Object	Member
Compare this object	Attribute	TC1 Current QP Start

Section	Field	Value
Compare this object	Condition	Is Greater Than
To this object	Object	Transaction
To this object	Attribute	Transaction Date

r. Click the Actions view tab.
s. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	RTC Automatic
Type	RTC Automatic

8. Create the fourth rule for this promotion:
   a. Add a new record to the Rules list, and enter the values in the following table.

Field	Value
Sequence	4
Name	Retro Txns 1 month ago D
Apply To	Transactions

   b. Click the Name field's hyperlink.
   c. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Check Txn Points

Field	Value
Type of Comparison	Compare to Values

d. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Transaction Points
Condition	Is Greater Than

e. Add a new record to the Values list and enter 0 in the Value field.
f. Add another new record to the Criteria list, and enter the values in the following table.

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

g. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Is Qualifying
Condition	Equals

h. Add a new record to the Values list and enter Y in the Value field.
i. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	3
Name	Transaction Age < 1 Month
Type of Comparison	Compare to Values

j. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Transaction Age
Condition	Is Less Than

k. Add a new record to the Values list and enter 30 in the Value field.

l. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	4
Name	TC1 Previous QP Start < Txn Date
Type of Comparison	Compare to Object

m. In the Compare to Object Detail form, enter the values in the following table.

Section	Field	Value
Compare this object	Object	Member
Compare this object	Attribute	TC1 Previous QP Start
Compare this object	Condition	Is Less Than

Section	Field	Value
To this object	Object	Transaction
To this object	Attribute	Transaction Date

n. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	5
Name	TC2 Previous QP Start < Txn Date
Type of Comparison	Compare to Object

o. In the Compare to Object Detail form, enter the values in the following table.

Section	Field	Value
Compare this object	Object	Member
Compare this object	Attribute	TC2 Previous QP Start
Compare this object	Condition	Is Less Than
To this object	Object	Transaction
To this object	Attribute	Transaction Date

p. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	6
Name	TC2 Current QP Start, Txn Date

Field	Value
Type of Comparison	Compare to Object

q. In the Compare to Object Detail form, enter the values in the following table.

Section	Field	Value
Compare this object	Object	Member
Compare this object	Attribute	TC2 Current QP Start
Compare this object	Condition	Is Greater Than
To this object	Object	Transaction
To this object	Attribute	Transaction Date

r. Click the Actions view tab.

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

Field	Value
Sequence	1
Name	RTC Automatic
Type	RTC Automatic

9. Create the fifth rule for this promotion:

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

Field	Value
Sequence	5
Name	Retro Txns 1 -3 months ago

Field	Value
Apply To	Transactions

b. Click the Name field's hyperlink.
c. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Check Txn Points
Type of Comparison	Compare to Values

d. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Transaction Points
Condition	Is Greater Than

e. Add a new record to the Values list and enter 0 in the Value field.
f. Add another new record to the Criteria list, and enter the values in the following table.

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

g. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Is Qualifying
Condition	Equals

h. Add a new record to the Values list and enter Y in the Value field.
i. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	3
Name	Transaction Age, 1 Month
Type of Comparison	Compare to Values

j. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Transaction Age
Condition	Is Greater Than

k. Add a new record to the Values list and enter 29 in the Value field.
l. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	4
Name	Transaction Age < 3 Months

Field	Value
Type of Comparison	Compare to Values

m. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Transaction Age
Condition	Is Less Than

n. Add a new record to the Values list and enter 90 in the Value field.
o. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	5
Name	TC1 Previous QP Start < Txn Date
Type of Comparison	Compare to Object

p. In the Compare to Object Detail form, enter the values in the following table.

Section	Field	Value
Compare this object	Object	Member
Compare this object	Attribute	TC1 Previous QP Start
Compare this object	Condition	Is Less Than
To this object	Object	Transaction
To this object	Attribute	Transaction Date

q. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	6
Name	TC2 Previous QP Start < Txn Date
Type of Comparison	Compare to Object

r. In the Compare to Object Detail form, enter the values in the following table.

Section	Field	Value
Compare this object	Object	Member
Compare this object	Attribute	TC2 Previous QP Start
Compare this object	Condition	Is Less Than
To this object	Object	Transaction
To this object	Attribute	Transaction Date

s. Click the Actions view tab.

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

Field	Value
Sequence	1
Name	RTC Automatic
Type	RTC Automatic

10. Create the sixth rule for this promotion:

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

Field	Value
Sequence	6
Name	Retro Txns 3 - 8 months ago
Apply To	Transactions

b. Click the Name field's hyperlink.
c. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Check Txn Points
Type of Comparison	Compare to Values

d. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Transaction Points
Condition	Is Greater Than

e. Add a new record to the Values list and enter 0 in the Value field.
f. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	2
Name	Is Qualifying?

Field	Value
Type of Comparison	Compare to Values

g. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Is Qualifying
Condition	Equals

h. Add a new record to the Values list and enter Y in the Value field.
i. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	3
Name	Transaction Age, 3 Months
Type of Comparison	Compare to Values

j. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Transaction Age
Condition	Is Greater Than

k. Add a new record to the Values list and enter 89 in the Value field.
l. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	4
Name	Transaction Age < 8 Months
Type of Comparison	Compare to Values

m. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Transaction Age
Condition	Is Less Than

n. Add a new record to the Values list and enter 240 in the Value field.
o. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	5
Name	TC1 Previous QP Start < Txn Date
Type of Comparison	Compare to Object

p. In the Compare to Object Detail form, enter the values in the following table.

Section	Field	Value
Compare this object	Object	Member
Compare this object	Attribute	TC1 Previous QP Start
Compare this object	Condition	Is Less Than

Section	Field	Value
To this object	Object	Transaction
To this object	Attribute	Transaction Date

q. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	6
Name	TC2 Previous QP Start < Txn Date
Type of Comparison	Compare to Object

r. In the Compare to Object Detail form, enter the values in the following table.

Section	Field	Value
Compare this object	Object	Member
Compare this object	Attribute	TC2 Previous QP Start
Compare this object	Condition	Is Less Than
To this object	Object	Transaction
To this object	Attribute	Transaction Date

s. Click the Actions view tab.

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

Field	Value
Sequence	1
Name	RTC Manual

Field	Value
Type	RTC Manual

11. Create the seventh rule for this promotion:
    a. Add a new record to the Rules list, and enter the values in the following table.

Field	Value
Sequence	7
Name	Retro Txns, 8 months
Apply To	Transactions

    b. Click the Name field's hyperlink.
    c. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Check Txn Points
Type of Comparison	Compare to Values

    d. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Transaction Points
Condition	Is Greater Than

    e. Add a new record to the Values list and enter 0 in the Value field.

f. Add another new record to the Criteria list, and enter the values in the following table.

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

g. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Is Qualifying
Condition	Equals

h. Add a new record to the Values list and enter Y in the Value field.

i. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	3
Name	Transaction Age, 8 months
Type of Comparison	Compare to Values

j. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Transaction Age

Field	Value
Condition	Is Greater Than

k. Add a new record to the Values list and enter 239 in the Value field.
l. Click the Actions view tab.
m. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	RTC Adjust Qualifying Points
Type	RTC Adjust Qualifying Points

12. Create the eighth rule for this promotion:

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

Field	Value
Sequence	8
Name	Retro Txns Prior to Previous QP TC2
Apply To	Transactions

b. Click the Name field's hyperlink.
c. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Check Txn Points
Type of Comparison	Compare to Values

d. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Transaction Points
Condition	Is Greater Than

e. Add a new record to the Values list and enter 0 in the Value field.
f. Add another new record to the Criteria list, and enter the values in the following table.

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

g. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Is Qualifying
Condition	Equals

h. Add a new record to the Values list and enter Y in the Value field.
i. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	3
Name	TC2 Previous QP Start, Txn Date

Field	Value
Type of Comparison	Compare to Object

j. In the Compare to Object Detail form, enter the values in the following table.

Section	Field	Value
Compare this object	Object	Member
Compare this object	Attribute	TC2 Previous QP Start
Compare this object	Condition	Is Greater Than
To this object	Object	Transaction
To this object	Attribute	Transaction Date

k. Click the Actions view tab.

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

Field	Value
Sequence	1
Name	RTC Adjust Qualifying Points
Type	RTC Adjust Qualifying Points

13. Create the ninth rule for this promotion:

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

Field	Value
Sequence	9
Name	Retro Txns Prior to Previous QP TC1

Field	Value
Apply To	Transactions

b. Click the Name field's hyperlink.
c. Add a new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	1
Name	Check Txn Points
Type of Comparison	Compare to Values

d. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Transaction Points
Condition	Is Greater Than

e. Add a new record to the Values list and enter 0 in the Value field.
f. Add another new record to the Criteria list, and enter the values in the following table.

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

g. In the Compare to Values Detail form, enter the values in the following table.

Field	Value
Object	Transaction
Attribute	Is Qualifying
Condition	Equals

h. Add a new record to the Values list and enter Y in the Value field.
i. Add another new record to the Criteria list, and enter the values in the following table.

Field	Value
Sequence	3
Name	TC1 Previous QP Start, Txn Date
Type of Comparison	Compare to Object

j. In the Compare to Object Detail form, enter the values in the following table.

Section	Field	Value
Compare this object	Object	Member
Compare this object	Attribute	TC1 Previous QP Start
Compare this object	Condition	Is Greater Than
To this object	Object	Transaction
To this object	Attribute	Transaction Date

k. Click the Actions view tab.
l. Add a new record to the Actions list, and enter the values in the following table.

Field	Value
Sequence	1
Name	RTC Adjust Qualifying Points
Type	RTC Adjust Qualifying Points

14. Click Activate to activate the Admin - Retro Accrual promotion.

Siebel Loyalty Batch Engine Parameters

The batch engine processes the following objects:

- Transactions, such as accruals and enrollments.
- Buckets, used in bucket promotions
- Tiers
- Statements

For each of these objects, you can set batch engine parameters to control which subset of records the batch engine processes. Parameters are conditional statements, and only records that match the condition are processed. Parameters apply to all programs.

Batch engine parameters are useful to:

- Do load balancing so the engine is not overloaded with too many records to process at one time.
- Process subsets of records. You might want to do this because:
    - Some records have higher priority and must be processed first.
    - Some records were processed and others were not during a failure, and you only want to process the records that were not processed previously.
    - A change in your program only affects some records.

Batch engine parameters are discussed in the following topics:

- *Configuring Batch Engine Parameters for Statementsfor Use with LDAP Authentication*
- *Setting Batch Engine Parameters*
- *Deleting Batch Engine Parameters*
- *Example of Setting a Batch Engine Parameter*

Configuring Batch Engine Parameters for Statements for Use with LDAP Authentication

You can use batch engine parameters with the object type of Statement to control the processing of Loyalty statements.

However, if you use LDAP for authentication, then you must configure the application by updating the following user properties in the LOY Statement business service:

- **LDAPUserId.** Update with the username.
- **LDAPPassword.** Update with the password.

If you have not enabled LDAP, then this configuration is not necessary. You can use batch engine parameters with the object type of Statement without this configuration. For more information about LDAP authentication, see *Siebel Security Guide* .

Setting Batch Engine Parameters

Use this procedure to set batch engine parameters.

If you add more than one record, then data is processed only if it matches the conditions in all the records you added. In other words, the conditions are treated as a logical AND.

After the engine has processed transactions, tiers, buckets, or statements using the parameters, you must either delete the parameters to process all transactions in later runs, or create new parameters to process some new subset of parameters in the next run. For more information, see *Deleting Batch Engine Parameters*.

To set a batch engine parameter

1. Navigate to the Administration - Loyalty Programs screen, Engine Parameters view.
2. Click the Transaction Parameters, Tier Parameters, Bucket Parameters, or Statement Parameters view tab.

   These views have the same fields, but they have different options available in the lists of values for the fields, depending on what values are needed for that type of parameter.
3. Add one or more new records and complete the necessary fields, described in the following table.

Field	Description
Object	Displays the object that the parameter applies to. The object depends on the type of parameter you are setting: o **Transaction Parameters.** The object is transaction. o **Tier Parameters.** The object is tier. o **Bucket Parameters.** The object is Member. o **Statement Parameters.** The object is Member. You can parameterize transaction, tier, bucket and statement processing based on transaction, bucket, and statement attribute and on member dominant tier.

Field	Description
	To setup member dominant tier as a parameter, you must select the transaction, tier, bucket or statement (in the appropriate views) as the object, select Member Tier as the attribute, and select the required tier as the value. For transaction processing, set up and activate the Member Tier attribute in the transaction attributes for the program (in the Program screen, Program Attributes, Transaction Parameters view).
Attribute	Select the object attribute that is used in the conditional statement.
Condition	Select the conditional operator that is used in the conditional statement.
Value	Enter the value that is used in the conditional statement.

Deleting Batch Engine Parameters

After you have used batch engine parameters in a run and you do not want them to apply to following runs, delete them using the following procedure.

To delete batch engine parameters

1. Navigate to the Administration - Loyalty Programs screen, Engine Parameters view.
2. Click the Transaction Parameters, Tier Parameters, Bucket Parameters, or Statement Parameters view tab.
3. Delete Parameter records.
4. Shut down and restart the server component.

Example of Setting a Batch Engine Parameter

The Loyalty administrator of an airline Loyalty program has created a set of new rules that apply only to transactions that occurred after November 30, 2009, that have Indigo Airlines as the partner. She sets a batch engine parameter so the engine processes only records of transactions that meet all three of these conditions.

To process transactions that meet several conditions

1. Navigate to the Administration - Loyalty Programs screen, Engine Parameters view.
2. Click the Transaction Parameters view tab.
3. Add a new record and enter the values described in the following table.

Field	Value
Object	Transaction

Field	Value
Attribute	Current Date
Condition	Is Greater Than
Value	11-30-2009

4. Add a new record and enter the values described in the following table.

Field	Value
Object	Transaction
Attribute	Partner
Condition	Equals
Value	Indigo Airlines

5. Add a new record and enter the values described in the following table.

Field	Value
Object	Transaction
Attribute	Amount
Condition	Is Less Than
Value	2000

Records are processed only if they meet both of the conditions that were entered.

Troubleshooting Disappearing Loyalty Members

If you have set up a new program and you find that newly created members are disappearing after you create them or you get an error message when you try to save the new member saying that it is a null query, then you need to make the following changes to the program:

- Make sure that at least one tier class is active.
- Make sure that the primary tier of the active tier class has the Show flag selected.

Importing and Exporting Loyalty Programs and Promotions

You can export Siebel Loyalty programs and promotions to an .xml file, then import the program or promotion data either into the same Siebel Loyalty instance, or into a different Siebel Loyalty instance. The ability to import and export loyalty programs and promotions is useful if, for example, you want to move program or promotion data from the development to the production environment.

The procedures in this topic describe how to export and import loyalty programs and promotions.

Exporting Loyalty Programs and Promotions

Perform the steps in the following procedure to export loyalty programs and promotions.

To export loyalty programs or promotions

1. To export a loyalty promotion:
    a. Navigate to the Loyalty Promotions Administration screen.
    b. Select the promotion you want to export from the Promotions list.

       You can select more than one promotion for export.
    c. Click the Export Promotions button.

       The promotion is exported to an .xml file. The value of the File Name process property of the LOY EAI Export Promotions workflow determines the name and location of the exported .xml file. The default directory and file name is `D:\eaipromotions.xml`.
    d. Move the eaipromotions.xml file to a directory in the Siebel File System to which the Siebel Service owner has read and write permission.
2. To export a loyalty program:
    a. Navigate to the Loyalty Program Administration screen.
    b. Select the program you want to export from the Programs list.
    c. Click the Export Program button.

The program is exported to an .xml file.The value of the File Name process property of the LOY EAI Export Program workflow determines the name and location of the exported file. The default directory and file name is `D:\eaiprogram.xml`.

d. Move the eaiprogram.xml file to a directory in the Siebel File System to which the Siebel Service owner has read and write permission.

The exported program or promotion can now be imported from the relevant .xml file into Siebel Loyalty.

Importing Loyalty Programs

You can import loyalty programs that were previously exported from a Siebel Loyalty instance into your Siebel Loyalty implementation. The following program data is imported during the import process:

- Tiers
- Partners
- Program-level attributes
- Promotion data

The following procedure describes how to import a loyalty program.

To import loyalty programs

1. Navigate to the eaiprogram.xml file that contains the program data you want to import.
2. Edit the file if any changes to the data are required.

   CAUTION: Do not change the value of the Program Id. If you do, then the program import process fails.

3. Navigate to the Loyalty Program Administration screen.
4. Click the Import Program button.

   The program data in the eaiprogram.xml file is imported into Siebel Loyalty. During the program import process, Siebel Loyalty validates the values specified for the program. If invalid values are identified, then the import stops, and an error message is displayed.
5. Entity row IDs automatically assigned in the original program, for example, tier IDs, product IDs and partner IDs, are retained when a program is imported. Replace these row IDs with equivalent row IDs for the Siebel Loyalty instance into which you imported the program.

Importing Loyalty Promotions

You can import one or more loyalty promotions that were previously exported from Siebel Loyalty into your Siebel Loyalty implementation. You can associate the imported promotion with a new program or with an existing program. During the import process, the following data associated with the promotion is imported:

- Rules
- Products
- Promotion-specific attributes
- Displayed attributes

- Tiers
- Incentive choices

Hierarchical rules data defined for the promotion is not imported.

The following procedure describes how to import a loyalty promotion.

Note: If a promotion is exported and then imported into the same Siebel Loyalty instance, then you must delete the tag `<PromotionNumber> value </PromotionNumber>` in the exported eaipromotions.xml file before importing the promotion. Each promotion must have a unique promotion number value.

To import loyalty promotions

1. Navigate to the eaipromotions.xml file that contains the promotion data you want to import, and make any changes to the data that are required, for example, you might want to change the product associated with the promotion, or amend the criteria for one of the rules.

   CAUTION: Do not change the value of the Promotion Id. If you do, then the promotion import process fails.

2. Navigate to the Loyalty Promotions Administration screen.
3. Click the Import Promotions button.

   Data for all promotions included in the eaipromotions.xml file is imported into Siebel Loyalty.

   During the promotion import process, Siebel Loyalty validates the values specified for the promotion. If invalid values are identified, for example, if the promotion uses attribute names that are not defined within the promotion, then the import stops, and an error message is displayed.

   Note: Define any program level attributes used by a promotion before importing the promotion.

   If multiple promotions are imported in a single eaipromotions.xml file, then each promotion is validated individually. If an error occurs during the import process for any one promotion, then import processing for all promotions stops.
4. After a promotion is imported, it is in an inactive state and must be activated as follows:
   a. Navigate to the Loyalty Promotions Administration screen.
   b. Select the promotion you previously imported, then click the Activate button.
5. Update the following values for the imported promotion:
   - Entity row IDs automatically assigned in the original promotion, for example, tier IDs, product IDs, and partner IDs, are retained when a promotion is imported. These row IDs must be replaced with equivalent row IDs for the Siebel Loyalty instance into which you imported the promotion.

     To update the row IDs, re-select any program level attributes that are associated with a selection dialog box (pick applet), and that are used in the criteria or actions defined for the promotion. Reselecting these attributes updates the appropriate row IDs in the Expression field.
   - The start date and end date defined for a promotion are retained when a promotion is imported. Change these fields if required.

Note: When you import a promotion that updates an existing promotion, any updates to fields that are part of the user key, for example, Promotion Name or Rule Name, will cause the import process to fail.

Related Topics

LOY EAI Export Program Workflow

LOY EAI Import Program Workflow

LOY EAI Export Promotions Workflow

LOY EAI Import Promotion Workflow

5 Setting Up Siebel Loyalty Promotions

Setting Up Siebel Loyalty Promotions

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

- *Types of Loyalty Promotions*
- *About Creating Loyalty Promotions*
- *Process of Creating Loyalty Promotions*
- *Transient Variables*
- *About Hierarchical Rules for Loyalty Promotions*
- *Creating Eligibility Promotions*
- *Specifying the Tiers Applicable to Loyalty Promotions*
- *Creating Incentives to Enroll in Promotions*
- *About Rules Libraries for Loyalty Promotions*
- *Formulas in Siebel Loyalty*
- *About Simulating Loyalty Transactions*
- *About Adding Marketing Information to Loyalty Promotions*
- *Process of Approving Loyalty Promotions*
- *Activating, Modifying, and Deactivating Loyalty Promotions*
- *Allowing Existing Member Fields to Be Used in Loyalty Promotion Criteria*
- *Allowing Added Member Fields to Be Used in Loyalty Promotion Criteria*
- *Configuring Common Promotions*
- *Loyalty Promotion Examples*
- *Troubleshooting Action-Based Bonuses*
- *Promotions Based on Day or Time of Purchase*
- *Theme-Based Promotions*

Types of Loyalty Promotions

There are the following basic types of loyalty promotions:

- **Admin Promotions.** Admin 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 identified by the Admin flag. All Admin promotions must have the Admin flag enabled. Because you must create admin promotions whenever you create a loyalty program, they are covered in the chapter about setting up programs, in *Creating Admin Promotions*.

- **Tier Promotions.** Tier promotions must be defined when you create a loyalty program to change members' tiers based on the number of points they earn. Because you must create tier promotions whenever you create a loyalty program, they are covered in the chapter about setting up programs, in *Creating Tier Promotions*.
- **Reward Promotions.** A reward promotion gives members opportunities to earn points that they can exchange for products or services or to earn other rewards. For example, the promotion might allow them to earn extra frequent flyer miles. Reward promotions can also be applied on redemption products. For more information about this type of promotion, see *Common Types of Reward Promotions*.
- **Base Promotions**. Base promotions are used to simplify setting up reward promotions or redemption promotions by calculating base points that can be used as the basis of further calculations. A base promotion can be defined when you create a loyalty program to calculate base points based on transaction attributes, member attributes, promotion attributes, distances, and so on. A program can have only one non-Promotion-Designer-enabled base promotion. A program can have more than one Promotion-Designer-enabled base promotion. For more information about this type of promotion, see *About Base Promotions*.
- **Eligibility Promotions**. These promotions contain rules and criteria but do not have any actions. They are used to check the eligibility of a particular member to get a specific set of promotional benefits. Eligibility promotions are used in Promotion Designer: the eligibility promotion is executed first, and reward promotions are only executed for those who meet the criteria of the eligibility promotion. For more information about this type of promotion, see *Creating Eligibility Promotions*.

Common Types of Reward Promotions

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, then they 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 three times, then they earn 3000 bonus points, if they fly four or five times, then they earn 4000 bonus points, or if they fly more than five times, then they earn 5000 bonus points.
- **Complex Promotions.** These promotions reward members for multiple purchases of different types. These are often run with partners to encourage members to buy both the company's and the partner's products. For example, if members stay at a specific hotel and rent a car from a specific car rental company, then they get 5000 bonus points.
- **Action-Based Bonuses.** These promotions reward members for some action other than a purchase. For example, if they update their member profile, then they get 500 bonus points, or if they register with your reward program, then they get 2000 bonus points. Either of these examples would only be given to a member once.
- **Partner Promotions.** These promotions reward members' activity with partner companies, and the partner's point block is debited to give the customers points. For example, an airline has hotel companies as its partners, and it runs a promotion giving bonuses for renting hotel rooms.
- **Roundtrip Promotions.** These promotions reward members for completing a round-trip flight.
- **Joint Accrual Promotions.** These promotions reward corporations for the activities of their employees, such as business travel with the host or its partners. The beneficiary can be only the employee, only the corporation, or both, depending on the accrual type of the corporate account. The prerequisite for this feature is to define the employee's relationship with the corporation. Promotions can be set up to calculate the points for the employee and the corporation. The employee and corporation can be rewarded in same point type or in different point types.

- **Accrual Package Promotions.** These promotions are similar to joint accrual promotions, in that a member earns a bonus for making purchases from multiple partners, but they have the additional ability to split debit points for the bonus among all the partners involved in the promotion, in a specified ratio. For example, if a member flies with a specific airline and stays in specific hotels and rents a car from a specific company, all within a specific time period, then they get 5000 additional points, and these points are debited to each partner in accordance with the ratio specified.

  For prepaid partners, separate accrual items are created for each partner's share of the points and points are debited from the partner's point block. For post-paid partners, Siebel Loyalty does not split debit points among partners for accrual package promotions. You can, however, create a custom report to show each post-paid partner's share of the debit points, then manually debit each partner's point balance appropriately.
- **Order Level Promotions.** These promotions reward members for multiple purchases made in a single order. For example, if members buy a camera and a lens in the same order, then they receive a 5% discount.

All of these types of promotions can 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*.

About Base Promotions

Base Promotions can be used to simplify the setup of other promotions. You set up the base promotion to calculate the base points, and then set up other accrual promotions or redemption promotions which are applied on top of the base promotion.

A program can have only one active base accrual promotion among promotions that are not promotion designer enabled. For promotions that are promotion designer enabled, there is no restriction on number of possible active base promotions of type Accrual or Redemption.

Base promotions can calculate points based on transaction attributes, member attributes, promotion attributes and so on. Examples are shown in the following table.

Business Type	Attribute
Retail	Amount spent
Airline	Distance between airports. See *Defining the Distance Between Two Airports*.
Hotel	Nights stayed
Other	You can use any partner and product level attributes in promotion criteria. You can create custom program attributes and methods. For example, you could define a promotion to give a bonus to senior citizens, and use a custom attribute to calculate the member's age.

You can set up other promotions to:

- Apply bonuses and incentives on top of base points earned by members
- Assign the points to members.
- Calculate total pricing for redemptions.

About Creating Loyalty Promotions

To create a 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.

  > **Note:** If the promotion requires member enrollment, then the tiers to which the promotion applies must be associated with the promotion.

- **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. A rule can be thought of as a combined if-then statement; if all of its criteria are met, then one or more actions take place.
- **Criteria.** Each rule includes one or more criteria. A transaction must meet all of these criteria for the rule to fire. If you think of a rule as an if-then statement, then the criteria are the *if* portion.
- **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. If you think of a rule as an if-then statement, then the actions are the *then* portion.

In addition to the records already described, promotions can 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 use this feature, then 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 use this feature, then 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, then the promotion only gives rewards to Platinum members, and only Platinum members can 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*.

Process of Creating Loyalty Promotions

This process describes the basics of creating promotions and adding them to Promotion Designer. Other topics in this chapter describe more specialized functionality that can be used when creating promotions.

For a general overview of how to create reward promotions, see *About Creating Loyalty Promotions*. Before you create a promotion, you must create a program that the promotion is part of. For more information, see *Setting Up Siebel Loyalty Programs*

To create loyalty promotions, perform the following tasks:

1. *Creating Attributes for Loyalty Programs*
2. *Creating a Loyalty Promotion Record*
3. *Specifying Products Included in a Loyalty Promotion*
4. *Providing Point Blocks for Loyalty Promotions*
5. *Creating Rules for Loyalty Promotions*
6. *Creating Criteria for Loyalty Promotion Rules*
7. *Creating Actions for Loyalty Promotion Rules*
8. *Using Promotion Designer*

Creating Attributes for Loyalty Programs

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

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

Before you create a promotion based on the attributes listed in the following table, the attributes must be defined at the program level.

All the types of attributes are described in the following table.

Attribute Type	Description	Read-Only?	Promotion Type Used By
Member Attributes	Name - Value pairs maintained for each member. These instances are created when the attribute is updated for a first time member.	No	All
Member Field Attributes	Fields of the Member record.	No, if the field is editable.	All
Member Tier Attributes	Fields of the Tier record for the member's tier.	No, 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. This attribute is defined for the Rolling tier model.	Yes	All
Transaction Attributes	Fields of the Transaction record.	Yes	Rewards/Transaction Rules
Promotion Specific Attributes	These attributes are defined at the promotion level and mainly used in bucket processing promotions. These attributes are only available to the specific promotion.	No, if the field is editable.	Rewards/Attributes
Partner Attribute	Fields of the Partner record.	Yes	All
Product Attribute	Fields of the Product record.	Yes	All

Attribute Type	Description	Read-Only?	Promotion Type Used By
Custom Attribute	These attributes use custom methods.	No, if the field is editable.	All
Calendar Attributes	These attributes are used to create promotions to reward purchases made on specific days and times. For more information, see *About Calendar Attributes*.	No	Rewards

This task is a step in *Process of Creating Loyalty Promotions*.

Creating Member Attributes

Member attributes are dynamic values that you create to track actions over the life time of a member. The value of a member attribute can be based on any field in a transaction, and they are updated every time a transaction takes place.

This task is a step in *Process of Creating Loyalty Promotions*.

To create member attributes

1. Navigate to the Loyalty Program Administration screen.
2. Locate the program that the attribute applies to and click its Program Id hyperlink.
3. Clear the program form's Active check box.
4. Click the Program Level Attributes view tab.
5. In the link bar of the Program Level Attributes view, click Member Attributes.
6. Add a record to the Program Level Attributes list, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Data Type	Based on what type of data is being tracked, select Date, Integer, Number, or String. If the values are free form text (such as Yes and No), then select String.
Default Value	Displays the original value before the transaction was updated.
Merge Action	Specify how the program handles this attribute when you do a member merge. For more information, see *Merging Loyalty Program Members*.
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, Siebel Loyalty displays 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, Siebel Loyalty displays the dialog box with the values for this field.

Field	Description
Pick Field	The pick field is that field whose value the user sees in the UI after selecting from the pick applet.

7. When you are finished creating all attributes for the program, select the program form's Active check box.

   Note: You also must create a promotion to update this attribute.

Creating Member Field, Member Tier, or Transaction Attributes

Member field 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 field, member tier, or transaction attributes

1. Navigate to the Loyalty Program Administration screen.
2. Locate the program that the attribute applies to and click its Program Id hyperlink.
3. Clear the program form's Active check box.
4. Click the Program Level Attributes view tab.
5. In the link bar of the Program Level Attributes view, click Member Field Attributes, Member Tier Attributes, or Transaction Attributes.
6. Add a record to the Program Level Attributes list, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Pick Field	Select the field that the attribute represents. To make additional fields available in this field, see *About Changing the Fields Used in Loyalty Attributes*.
Merge Action	Specify how the program handles valid attributes when you do a member merge. For more information, see *Merging Loyalty Program Members*. **Note:** This field is optional and is not applicable to all fields.

   You can use the Transaction Attributes such as Day and Hour to set up promotions based on day of the week and the time of day. For example, you can set up a promotion to reward a member with bonus points for shopping on Wednesday between 2:00 P.M. and 5:00 P.M. in a given time zone. If you require additional attributes, then you can add them by extending the Transaction business component using Siebel Tools. For more information, see *Using Siebel Tools* .
7. When you are finished creating all attributes for the program, select the program form's Active check box.

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 gets one hundred bonus points.

To create point totals attributes

1. Navigate to the Loyalty Program Administration screen.
2. Locate the program that the attribute applies to and click its Program Id hyperlink.
3. Clear the program form's Active check box.
4. Click the Program Level Attributes view tab.
5. In the link bar, click Point Totals Attributes.
6. Add a record to the Program Level Attributes list, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Point Type	Select the point type.
Period UoM	Enter the number of months that the points are totaled over.

7. When you are finished creating all attributes for the program, select the program form's Active check box.

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. In the Promotions list, find the promotion that the promotion specific attribute applies to and click the hyperlink in its Promotion Number (#) field.
3. If the promotion form's Active check box is selected, then click Modify.
4. Click the Promotion Specific Attributes view tab.
5. Add a new record to the Promotion Specific Attributes list, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Field	Select the field that the attribute represents. For information about specifying which fields are available, see *About Changing the Fields Used in Loyalty Attributes*.
Default	Enter a default value to 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, then its data type is displayed automatically.

Field	Description
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, Siebel Loyalty displays 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, Siebel Loyalty displays 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.
Active	Select this check box to make the attribute available for use in criteria and actions.

Displaying Promotion-Specific Attributes to Members

If you want to display a promotion's promotion-specific attributes to members on the member portal, then after creating the attribute, you must select it in the Displayed Attributes view.

The attributes appear for applicable enrolled promotions in the following view: Member Portal, My Profile (LHS top link), My Promotions, Drilldown on any enrolled promotion, list applet for promotion attributes.

If a Member has enrolled in the promotion and has at least one qualifying transaction for the promotion, then the attribute automatically appears in this view.

To display attributes to members on the member portal

1. Navigate to the Loyalty Promotions Administration screen.
2. In the Promotions list, find the promotion that the attribute applies to and click the hyperlink in its Promotion Number (#) field.
3. Click the Displayed Attributes view tab.
4. Add a new record to the Displayed Attributes list.

   The Pick Attribute dialog box appears.
5. In the dialog box, select one or more attributes that you want to display and click OK.

Creating Custom Attributes

You can create a custom attribute to be used in promotion criteria or actions.

You create the custom attribute in the Administration - Business Service screen, defining the method in Methods view and entering a script in Scripts view.

To create a custom attribute

1. Navigate to the Administration - Business Service screen, then the Methods view, and define the method.
2. Navigate to the scripts view and enter the script.

For more information about the fields used to define the method and enter the script, see the topic about creating business services in a Siebel application in *Integration Platform Technologies: Siebel Enterprise Application Integration* .

Example of Custom Method for Custom Attributes

To create a custom attribute, you must create a custom method that the attribute calls. Here is an example of how you could use eScript to write a custom method named GetValuesCustomAttribute to be used by a custom attribute.

```
function GetValuesCustomAttribute(inputs, outputs)
{

 try{

 // All the field values would be in the format Object.Field.Field Name. All the
 // values would be passed to custom attributes.
 // Avoid Using transaction Id and querying transaction BC, as in simulation
 // mode the attributes passed in transaction are passed to simulation. Always use
 // the values from the Transaction.Field.Field Name.

 var strOrgAirPort = inputs.GetProperty ("Transaction.Field.Origination Airport");

 var strDestAirPort = inputs.GetProperty ("Transaction.Field.Destination Airport");

 var customCoeff = inputs.GetProperty ("Transaction.Field.Custom Coeff Factor");

 var points = 0;

 if(strOrgAirPort == "SFO" &&strDestAirPort ="BOS")

 points = 200 * customCoeff;

 outputs.SetProperty("Field Value",points);

 }

 catch(e)

 {

 TheApplication().RaiseErrorText(e.toString());

 }

 finally

 {

 }

}
```

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*.

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. You must expand the More Info form to view some of these fields.

Field	Description
Apply To	Select which type of transaction the promotion applies to. The options are: Accrual-Product, Loan, Redemption-Product, Cancellation, Accrual-Gift, Bonus, Voucher, Enrollment, Lounge Purchase, Point Purchase, Points Transfer, Redemption-Availment, Transfer Points, Manual Credit, Manual Debit, Membership Renewal, Voucher Reissue, and Custom. If you leave this field blank, then the promotion can apply to all types of transactions.
Admin	Select this check box to identify this as an Admin promotion.
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*.
Base	Select this check box to identify this as a Base promotion.
Enrollment Required	Select this check box to require members to enroll for the promotion in order to get the reward. If it is not selected, then all members of the program receive the reward for this promotion without enrolling in it.
Accrual Package Flag	Select this check box if the points for this promotion are shared by multiple partners.
Order Flag	Select this check box if this promotion is used to reward members who make multiple purchases in a single order.
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, then enter the dates when members can enroll. In general, these dates must fall within the promotion's start and end dates.
Product Inclusion	Select which products the promotion applies to. The options are: ○ **All Products.** Applies to all products.

Field	Description
	○ **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 are taken from a point block created specifically for this promotion. Select Unlimited if the points are taken directly from the company's or partner's point blocks, without limit. For more information, see *Providing Point Blocks for Loyalty Promotions*.
Partner	Select the company that the promotion is hosted by. This company's point block is debited when members earn points as a result of this promotion. It can be a partner company or the host company.
Partner Action On	Displays the date and time when the partner approved or rejected the promotion. You must expand the Promotion form to see this field.
Partner Action By	Displays the login name of the partner who approved or rejected the promotion. You must expand the Promotion form to see this field. Active This check box is selected if the promotion is active. You cannot select or clear it manually. It changes when you click the Activate, Deactivate, or Modify button.
Active	This check box is selected if the promotion is active. You cannot select or clear it manually. It changes when you click the Activate, Deactivate, or Modify button.
Effective Period, Period Type, and Enrollment Expiry Date	These fields are used in theme-based promotions. For more information, see *Theme-Based Promotions*.

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

This task is a step in *Process of Creating Loyalty Promotions*.

To specify products included in or excluded from a promotion

1. Navigate to the Loyalty Promotions Administration screen.
2. In the Promotions list, find the promotion for which you want to include or exclude products and click the hyperlink in its Promotion Number (#) field.
3. If the promotion form's Active check box is selected, then click Modify.
4. In the Apply To field of the Promotion record, make sure that Include Products or Exclude Products is selected.
5. Click the Products view tab.
6. 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:

- **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, then you select Unlimited in the Point Limit Type field of the Promotion record, so points are 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.
- **Create point blocks specifically for a promotion.** If you want to limit the number of point blocks that a promotion can distribute, then you select Limited in the Point Limit Type field of the Promotion record, so points are only taken from point blocks created specifically for the promotion. Then you must create the point blocks for the promotion.

This task is a step in *Process of Creating Loyalty Promotions*. This task applies only to reward promotions.

Checking Point Blocks Available for a Loyalty Promotion

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

The promotion uses points from point blocks based on the conversion value defined in the Partner Account Debit view. Fields included are:

- **Program.** Must be the same as the promotion's program.
- **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 and click the hyperlink in its Program Id field.

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, then create more points as described in *Creating Point Blocks for Loyalty Programs*.

Creating Point Blocks for a Loyalty Promotion

If you selected Limited in the Point Limit Type field of the Promotion record, then you must associate a point block with the promotion, and this point block is used to give points for this promotion.

A subpoint block is created and associated with the promotion. The subpoint block takes a specified number of points from a point block that has been created and activated in the Program Administration screen, Point Blocks field.

For more information about fields in the Point Block record, see *Creating Point Blocks for Loyalty Programs*.

Note: Before doing this procedure, 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 and click the hyperlink in its Promotion Number (#) field.
3. If the promotion form's Active check box is selected, then click Modify.
4. Click the Point Blocks view tab.
5. Add a new record to the Point Blocks list, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Name	Enter the name for the subpoint-block.
Parent Point Block	Choose the parent point block. The pick applet shows active point blocks associated with the same partner as the promotion is hosted by.
Total Points	Enter how many points from the parent point block are available for use with this promotion.
Status	Select Approved to approve this point block.

Creating Rules for Loyalty Promotions

This task is a step in *Process of Creating Loyalty Promotions*.

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. Rules can have three possible values in the Apply To field: Attributes, Transactions, Tiers. Loyalty executes the actions of only one rule for each Apply To value. When it finds a rule that qualifies (meaning all of its criteria validate to true), it executes that rule's actions. Loyalty then continues to read the rules in sequence order and, if there are rules with different Apply To values that qualify, then it also executes those rules' actions.
- **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, then Loyalty executes the actions for that rule.
- **Note:** This procedure describes how to create individual rules. If you have complex promotions that use many different rules, then it might be useful to create hierarchical rules. For more information, see *About Hierarchical Rules for Loyalty Promotions*.

To enter rules for a loyalty promotion

1. Navigate to the Loyalty Promotions Administration screen.
2. In the Promotions list, find the promotion for which you want to enter rules and click the hyperlink in its Promotion Number (#) field.
3. If the promotion form's Active check box is selected, then click Modify.
4. Click the Rules view tab.
5. Add one or more new records to the Rules list, and complete the necessary fields, described in the following table.

Field	Description
Sequence Number (#)	Enter the sequence in which Siebel Loyalty evaluates the rules of the promotion.
Name	The name given to the rule.
Apply To	If this rule is used in a loyalty promotion, then select either Transactions or Attributes to specify which of these the rule applies to. If this rule is used in a tier promotion, then this field is read only and displays Tiers.

Creating Criteria for Loyalty Promotion Rules

The criteria of a rule are conditional statements that Siebel Loyalty evaluates as true or false.

If you add multiple criteria, then 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, then it applies 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, then 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*.

Creating Criteria That Compare Attributes to Values

This type of criterion lets you compare an attribute to a value. For example, you can see whether the value in a specific field is greater than 1000. If it is, then the criterion 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 Promotions list, find the promotion for which you want to create criteria and click the hyperlink in its Promotion Number (#) field.
3. If the promotion form’s Active check box is selected, then click Modify.
4. Click the Rules view tab.
5. Select a rule and click its Name field hyperlink.
6. Add one or more new records to the Criteria list, and complete the necessary fields in the Criteria list record and its Detail form. Some fields are described in the following table.

Field	Description
Sequence Number (#)	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 is 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. Member Tier is available only if Tier is selected in the rule's Apply To field.
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 shows comparison operators such as Equals, Does Not Equals, Is Greater Than, Is Empty, Starts With.

Field	Description

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

   For example, you must add values if you choose Equals as the condition. You cannot add values if you choose Is Empty as the condition.

Creating Criteria That Compare Attributes with Attributes

This type of criterion lets you compare an attribute with another attribute. For example, you can see whether the value in a specific field is greater than the value in another field. If it is, then the criterion 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 with another attribute

1. Navigate to the Loyalty Promotions Administration screen.
2. In the Promotions list, find the promotion for which you want to create criteria and click the hyperlink in its Promotion Number (#) field.
3. If the promotion form's Active check box is selected, then click Modify.
4. Click the Rules view tab.
5. Select a rule and click its Name field hyperlink.
6. Add one or more new records to the Criteria list, and complete the necessary fields in the Criteria list record and its Detail form. Some fields are described in the following table.

Section	Field	Description
N/A	Sequence Number (#)	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.)
N/A	Type of Comparison	Select Compare to Object.
Compare this object	Object	Select the Object whose attribute is compared.
Compare this object	Attribute	Select the attribute to be compared.
To this object	Other Object	Select the Object whose attribute the first attribute is compared with.
To this object	Other Attribute	Select the attribute that the first attribute is compared with.

Section	Field	Description
And/Or this value	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 use this feature, then 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, then the criterion 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 first create a promotion specific attribute to evaluate the roundtrip. Next, 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 Promotions list, find the promotion for which you want to create criteria and click the hyperlink in its Promotion Number (#) field.
3. If the promotion form's Active check box is selected, then click Modify.
4. Click the Rules view tab.
5. Select a rule and click its Name field hyperlink.
6. Add one or more new records to the Criteria list, and complete the necessary fields in the Criteria list record and its Detail form. Some fields are described in the following table.

Section	Field	Description
N/A	Sequence Number (#)	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.)
N/A	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.

Section	Field	Description
Compare Transaction Roundtrip Info	Attribute	Enter the transaction attribute that has the roundtrip information.
To Recorded Roundtrip Info	Object	Enter the object in which the engine must 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.

7. 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, where XXX and YYY are airport codes.

   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, then Siebel Loyalty executes the actions for that rule.

The following actions are used in promotions:

- **Assess Next Tier.** Assesses the member's qualification for moving up to the next tier.
- **Assign Points.** Gives points to the member.
- **Assign Voucher.** Assigns an electronic voucher for redeeming a product or a service.
- **Calculate Base Price.** Calculates the base price derived from the distance table, using the airport as inputs. The distance is then converted to given point type in the promotion. This action is available only for the base promotion where the Base flag field was selected at the promotion level.
- **Cancel Transaction.** Cancels a transaction.
- Discount Points. This action can be used to apply discounts on point prices in a redemption promotion. The action can only be used with promotions that are Promotion-Designer enabled and that use a transient variable. For more information, see *Transient Variables*.
- Discount Points plus (+) Pay. This action can be used to apply discounts on point-and-pay prices in a redemption promotion. The action must be used with a transient variable. For more information, see *Transient Variables*.
- **Downgrade Tier.** Downgrades the member to a lower tier. You must specify the tier to which the member is downgraded.
- **Gift Points.** Assigns gift points to the member.
- **Invoke Custom Action.** Invokes a method that you create to perform custom actions.
- **Issue Bulk Voucher.** Assigns an electronic voucher for redeeming a product or service when you are using bulk redemptions. This action converts points to a currency value, so you can assign members a voucher with currency values that are based on the number of points they have. For more information, see *Batch Redemption Process*.
- **Points Reactivation.** Reactivates the member's expired points.

- **Promotion Enrollment.** Enrolls the member in a promotion.
- **Qualify Tier.** Qualifies the member for a tier. This can be used when the member has enough points to move to this tier, but is not in qualifying period of the tier and the member's present tier is not expired.
- **Redeem Points.** Redeems the member's points.
- **Requalify Tier.** Requalifies the member for a tier. This can be used when the member is in the qualifying period and the member's tier is expired.
- **RTC Automatic.** RTC stands for Retro Tier Change. RTC automatic means the retro tier change is done automatically based on the past accrual transactions that are valid and qualified. This action is called if the promotion performs this automatic tier change.
- **RTC Manual.** The retro tier change is done manually. This action is called if the user performs the tier change manually.
- **RTC Adjust Qualifying Points.** Adjusts the qualifying points to the new tier.
- **Track and Assign Points.** Adds the value of the transaction points to the transient variable associated with the point type. The action can only be used with promotions that are Promotion-Designer enabled and that use a transient variable. For more information, see *Transient Variables*.
- **Update Attribute.** Changes the value of an attribute.
- **Upgrade Relationship Tier.** The tier of the member's relationship changes whenever the member reaches a specific tier. This applies only if the member's relationship is already a member. Otherwise, no action is taken.
- **Update Roundtrip Info.** Updates information about the segments of a roundtrip that have been completed. This action is only used when you create a criterion of the type Evaluate Roundtrip.
- **Upgrade Tier.** Upgrades the member to a higher tier. You must specify the tier to which the member is upgraded.

This task is a step in *Process of Creating Loyalty Promotions*.

Creating an Assign Points Action

Use the following procedure to create an assign points action.

To create an assign points action

1. Navigate to the Loyalty Promotions Administration screen.
2. In the Promotions list, find the promotion for which you want to create an action and click the hyperlink in its Promotion Number (#) field.
3. If the promotion form's Active check box is selected, then click Modify.
4. Click the Rules view tab.
5. Select a rule and click its Name field hyperlink, and click the Actions view tab.
6. Add a new record to the Actions list, and in the Type field, select Assign Points.
7. In the record's Detail form, complete the necessary fields, described in the following table.

Field	Description
Use from Transaction	If you select this check box, then the promotion uses the same point type and qualifying or nonqualifying value as the transaction. The Point Type and Qualifying fields become read-only. You can select this check box only for rules that apply to transactions.

Field	Description
Point Type	Select the point type to assign.
Qualifying	Select or clear this check box to make the points qualifying or nonqualifying. Both qualifying and nonqualifying points are assigned to a member.
Object, Attribute, Operator, Value, Range	Use these fields to build the expression that specifies how many points the member receives: o 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 equal to the number of base points. o 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. o 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. o Use Range to give points according to defined multiplication factors.
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. **Note:** The expiration values you specify for points in the Expiration Length and Expiration UoM fields apply *only* if you have not specified point expiry values at the tier level or the point type level. If you have specified point expiry values at the point type level or at the tier level, then those values take precedence and the points that are given as a result of this promotion expire based upon the values defined at the tier level or the point type level.
Expiration Snap To	(Optional) Specify that the expiration occurs on the nearest month, year, and so on to the expiration date determined by Expiration Length and UoM.

Creating an Update Attributes Action

Use the following procedure to create an update attributes action that changes the value of an attribute.

To create an update attributes action

1. Navigate to the Loyalty Promotions Administration screen.
2. In the Promotions list, find the promotion for which you want to create an action and click the hyperlink in its Promotion Number (#) field.
3. If the promotion form's Active check box is selected, then click Modify.
4. Click the Rules view tab.
5. Select a rule and click its Name field hyperlink, and click the Actions view tab.
6. Add a new record to the Actions list, and in the Type field, select Update Attribute.
7. In the Detail form, and complete the necessary fields, described in the following table.

Section	Field	Description
Update this attribute	Object and Attribute	Use these fields to specify the attribute to be updated.
Update this attribute	Action	Select the action to be performed on the attribute.
With this attribute	Object, Attribute	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 in *Creating an Assign Points Action*.
And/Or this value	Operator, Value	

Creating an Assign Voucher Action

Use the following procedure to create an assign voucher action that assigns an electronic voucher for redeeming a product or service.

Before you create a promotion that uses this action, you must create the voucher. For more information, see *Creating Vouchers for Loyalty Members*.

To create an assign voucher action

1. Navigate to the Loyalty Promotions Administration screen.
2. In the Promotions list, find the promotion for which you want to create an action and click the hyperlink in its Promotion Number (#) field.
3. If the promotion form's Active check box is selected, then click Modify.
4. Click the Rules view tab.
5. Select a rule and click its Name field hyperlink, and click the Actions view tab.
6. Add a new record to the Actions list, and complete the necessary fields, described in the following table.

Field	Description
Type	Select Assign Voucher.
Voucher	Select the voucher that is assigned. The list displays all the products that are set up as electronic vouchers.
Voucher Quantity	Select a number to specify how many of these vouchers are assigned. The default is 1.
Use From Transaction	Select this check box if either of the following statements applies: o The redemption transaction uses an electronic voucher for the product and a promotion is applied on the transaction to assign the voucher. **Note:** If this transaction is set up with a product of type of electronic voucher, then the promotion must have the Use From Transaction flag checked so that, when the member redeems this product, Siebel Loyalty automatically issues a voucher to the member.

Field	Description
	To assign more than one voucher to a member, specify the required number in the Quantity field of the transaction record. The Quantity field is not displayed in the user interface by default so you must use Tools to expose the field in the transaction applet, then deliver the changes to the Siebel runtime repository. For additional information on configuring applets, see *Configuring Siebel Business Applications* . o The transaction has a bundled product which includes an electronic voucher. For example, if a member redeems a one day Compact Car, then the product selected is: 1-Day Compact Car.

7. Complete the optional fields in the Discount Type area, described in the following table, only if you want to create a voucher that is a discount amount, such as $20 discount or 10% discount.

Field	Description
Discount Type	Select Absolute Value or Percentage to determine whether the discount gives a cash voucher or a percentage discount.
Object	Optional. Specify the object that the discount is calculated from. Possible objects are Transaction, Member, Promotion, Formula or Custom. Do not use Distance, Member Tier, Partner or Product attributes.
Attribute	Optional. Specify the attribute of the object that the discount is calculated from. The attribute must be of the number or integer type.
Operator	Optional. Select the operator used to calculate the discount. If the discount is an absolute value, then the valid operators are Add, Multiply, Divide, or Subtract. If the discount is a percentage, then the operator must be Multiply.
Currency	Select one of the following: o The value by which the Attribute is modified based on the operator, if you have entered the Object, Attribute, and Operator. o The absolute value of the voucher if the Object, Attribute and Operator are null. This field is available and is required if the Discount Type is Absolute Value.
Voucher Discount Value	Select one of the following: o The value by which the Attribute is modified based on the operator, if you have entered the Object, Attribute, and Operator. o The absolute value of the voucher if the Object, Attribute and Operator are null. This field is available and is required if the Discount Type is Percentage.

Using Invoke Custom Action

You can define your own custom actions for promotions. Supported custom actions include:

- CancelTxnAttributes
- SetLoanBalance
- DebitVoucher
- CancelRedmptionVoucher
- ReIssueVoucher
- PurchasePoints
- TransferPoints
- LoungePurchase
- RenewMembership

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 arguments in the following table are passed in to the method. Some of these arguments might 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

Example of Using Invoke Custom Action

This topic gives one example of how to create a method and use it in Invoke Custom Action. You might use this feature differently, depending on your business model.

An airline wants to calculate the redemption price for flights dynamically. This price varies depending upon the load factor of each flight, information that is outside Siebel Loyalty.

The example creates a custom attribute in Siebel Loyalty, with a method that retrieves the load factor data from outside, uses this data to modify the transaction attribute and returns the value to Loyalty. This attribute can be used in Loyalty promotion criteria and actions. It is used to calculate the final redemption price at the time the transaction is processed.

To implement this functionality, perform the following steps:

- Write a Siebel eScript in the LOY Customer Action Business Service. The sample eScript follows:

```
function Service_PreInvokeMethod
(MethodName, Inputs, Outputs)
 {
 if (MethodName == "GetValue")
 {
 var ActiveBO = TheApplication().GetBusObject("LOY Transaction");
 var myBusComp = ActiveBO.GetBusComp("LOY Transaction");
 var txnId = "";
 txnId = Inputs.GetProperty("Transaction Id");
 myBusComp.ClearToQuery();
 myBusComp.SetSearchSpec("Id", txnId);
 myBusComp.ExecuteQuery(ForwardBackward);

 var points = 0;
 points = myBusComp.GetFieldValue("Load Factor");
 points = points * 1000;
 Outputs.SetProperty("Field Value",points);
 return (CancelOperation);
 }
}
```

- Compile the eScript.
- In the Loyalty Program Administration, Programs, Program Level Attributes, Custom Attributes view, create a new custom attribute named Load Factor of type integer.
- Give the method the name GetValue.
- Use this custom attribute in a promotion's action. In the Loyalty Promotions Administration, Promotion, Rules, Actions view, in the Assign Points form, select Custom as the Object and GetValue as the Attribute.

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 nonqualifying.
- 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*.

Using Cancel Transactions

This type of action is used only for promotions where Apply To has the value Cancellation.

This type is used only in Admin Promotions, not in promotions that are made visible to customers. For more information about base promotions, see *Creating Admin Promotions*.

Using Promotion Designer

Optionally, you can use Promotion Designer to group and sequence a set of promotions in a loyalty program. Promotion Designer lets you fire promotions in a particular sequence, allowing you to validate the sequence of the promotions and calculate the points awarded for a particular flow.

A single program can include both promotions that are enabled for Promotion Designer and promotions that are not Promotion-Designer enabled. However, during transaction processing, Siebel Loyalty executes a series of checks that

verify the combination of the Partner Category of the Partner and the Product Category of the Product within the transaction. If the check validates, then Siebel Loyalty will apply the promotions that are part of the promotion design that is active for the validate Partner and Product category.

When you use Promotion Designer, you can also use:

- **Transient variables.** For more information, see *Transient Variables*.
- **Eligibility promotions.** For more information, see *Creating Eligibility Promotions*.

The Promotion Designer Screen

The Promotion Designer screen is the main screen used for creating promotion designs. It has two major sections:

- **Promotion Designer Form.** The form is at the start of the screen and contains details about the promotion design.
- **Promotion Designer.** The graphical area where the promotion is designed. It is located after the Promotion Designer form applet and is further subdivided into two sections:
  - **Objects Explorer.** Contains objects representing steps in a promotion design, which can be dragged to the Designer Palette.
  - **Designer Palette.** The objects dragged into this palette correspond to steps within the promotion design. Each object represents a step in the logical flow of the promotion design.

The following table lists the objects in the Objects Explorer and describes how they function as steps in the promotion design.

Step Object	Description	Object Rules
Start	Marks the beginning of the promotion design, and the point from which the rules evaluation begins.	• A promotion design must and can have only one Start step • A Start step can be connected to an Eligibility Promotion, Base Promotion, Promotion or a Phase step
End	Marks the end of the promotion design, and the point at which the rules evaluation ends.	• A promotion design must and can have only one End step • The End step can only be connected to one other step • An End step cannot be connected to a Start step
Eligibility Promotion	An Eligibility Promotion step has a specific set of rules and criteria but does not have any actions. These types of promotions are used to check the eligibility of a particular member who might be entitled to get a specific set of promotional benefits. If the criteria in the Eligibility Promotion step are not met, then the flow is terminated.	• A promotion design can only have one Eligibility Promotion step • An Eligibility Promotion step can be connected to a Start, Base Promotion, Promotion or a Phase step • An Eligibility Promotion step cannot be connected to a Stop step
Accrual Base Promotion	An accrual Base Promotion step calculates the base points of an accrual. **Note:** The object immediately following the Base Promotion in a sequence must be promotion whose action assigns transaction points to a selected point type.	• A promotion design can have only one Base Promotion step • The Base Promotion step must immediately follow the Start step or an Eligibility Promotion step • The Base Promotion step can be connected to another Promotion or a -Phase step

Step Object	Description	Object Rules
Redemption Base Promotion	A redemption Base Promotion step calculates the base points of a redemption.	• A promotion design can have only one Base Promotion step • The Base Promotion step must immediately follow the Start step or an Eligibility Promotion step • The Base Promotion step can be connected to another Promotion or to a Phase step
Promotion	A Promotion step is a promotion that is selected from the existing promotions in a program.	• A promotion design can have multiple Promotion steps, however a specific Promotion cannot be added more than once to a promotion design • A Promotion step can be connected to another Promotion, Eligibility Promotion, Base Promotion, Phase, Stop or End step
Phase	A Phase step consists of multiple promotions. Each promotion within a phase uses the same set of inputs that is passed to the Phase step from its predecessor. There is no sequence within a Phase step: all promotions are evaluated in parallel. The output of a Phase step takes into account all of the promotions within the phase: if more than one promotion updates the same attribute, then the final value of the attribute is the union of all the actions.	• A promotion design can have multiple Phase steps • A Phase step can be connected to another Promotion, Phase, Stop or End Step • A Phase Step cannot both be connected to an End Step and Stop Step at the same time
Stop	The Stop step signifies a break in the processing of the promotion design. If none of the criteria of the promotion to which the Stop step is connected are met, then the execution of the promotion design stops at that step and the promotion points accumulated until that step are applied to the transaction.	• A promotion design can have none, one or multiple Stop steps • A Stop Step can only be connected to a Phase or a Promotion • A Stop step can only be connected to one step
Connector	A Connector associates two functional steps with one another. The direction of the arrow of the Connector indicates the sequence of steps in the promotion design.	• A promotion design always has multiple connectors • A Connector can be connected to another Promotion, Phase, Stop or End step • A Connector cannot be connected to another Connector • A Connector has to be connected to at least two steps of type Promotion, Phase, Stop or End

Creating a Promotion Design

Use the following procedure to create a promotion design.

To create a promotion design

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

Field	Description
Name	Enter the name of the Promotion Design.
Program Name	Select the program name with which to associate the promotion design.
Partner Category	Select the partner category.
Product Category	Select the product category.
Apply To	Specify Accrual-Product or Redemptions-Product.

> **Note:** If the promotion design is to be applied to Accrual-Product promotions, then a promotion design for each partner is required, if the partner category is different.

3. Click on the promotion design created in the preceding step.
4. Select and, without releasing the selection, move objects from the Objects Explorer to the Designer Palette, following the rules defined in *The Promotion Designer Screen*.
   After inserting a Promotion, Eligibility Promotion, or a Phase, follow the instructions in the following steps.
5. To insert an eligibility promotion step in a promotion design:
   a. Select the Eligibility Promotion object from the Objects Explorer and, without releasing the selection, move it to the Designer Palette.
   b. Select an Eligibility Promotion from the Pick Promotion list.

      > **Note:** Only eligibility promotions are listed.

   c. Click OK.
6. To insert a promotion step in a promotion design:
   a. Select the Promotion object from the Objects Explorer and, without releasing the selection, move it to the Designer Palette.
   b. The Pick Promotion list appears.

      > **Note:** Only promotion types matching the Apply To of the promotion field are listed.

   c. Select a promotion.
   d. Click OK.
7. To insert a phase step in a promotion design:
   a. Select the Phase object from the Objects Explorer and, without releasing the selection, move it to the Designer Palette.

      > **Note:** Adding a phase step to a redemption promotion design is not recommended.

   b. The Phase Details window appears.
   c. Enter a Name and Description for the phase.

d. To add promotions to the Phase step:
   - Click the MVG button in the Promotions text box.
   - Click the Show Available button to display all promotions that can be selected.
   - Select a promotion, then click the Add button or, to add multiple promotions at once, control-click multiple promotions, then click the Add button.

   The promotions are listed in the Selected window.
e. Click OK to return to the Phase Details window.
f. Click OK to close the Phase Details window and save the phase details.

> **Note:** Adding promotions that update the same attribute within a phase is not recommended. If subsequent promotions require values from previous promotions within a phase, then these need to be updated using separate transient variables which can then be referenced in separate promotions. For more information about transient variables, refer to *Transient Variables*.

Validating and Activating the Promotion Design

The Promotion Designer comes with the ability to analyze the entire promotion design and check its consistency. Unless a promotion design is validated successfully it cannot be activated.

The validation status of a promotion design is always displayed in the Validation Status bar. A Validation Status of Green (where the status bar appears in the color green) signifies that the promotion design has been successfully validated. A Validation Status of Red (where the status bar appears in the color red) signifies that the promotion design is invalid.

To validate and activate the promotion design

1. Click the Validate button in the upper corner of the promotion design.

   Clicking the button triggers a validation check of the promotion design. If it is invalid, then the reasons are displayed.
2. If there are errors, then correct them.
3. Click the Activate button.

The Activate button is enabled only after the promotion design has been successfully validated.

Transient Variables

The following topics include information about transient variables:

- *Overview of Transient Variables*
- *Viewing Transient Variables*
- *Defining Transient Variables for Existing Point Types*
- *Defining Transient Variables for User-Defined Attributes*
- *Examples of Using Transient Variables*

Overview of Transient Variables

Transient variables are program-level attributes used in the context of a promotion design. For more information about Promotion Designer, see *Using Promotion Designer*.

They can be used in promotion criteria and actions, like all other program-level attributes.

Transient variables can only be used in Promotion-Designer-enabled promotions. The promotion's Designer Availability field must be selected.

There can be only one transient variable for a given point type. When you create a new point type for a program, the transient variable for it is created automatically.

Transient variables allow you to dynamically track information obtained during the processing of promotions in a promotion design. You can then use this information to give you greater control of promotion processing.

For example, consider the following logic: if promotion A is applied then promotion B applies. This logic can be addressed through the use of transient variables as follows:

- Promotion A updates attribute X to show that it has been applied.
- Promotion B looks up attribute X during its execution by the same promotion design. If attribute X shows that Promotion A was applied, then Promotion B is also applied.

The following actions can use transient variables:

- **Track and Assign Point**. This action can be used in accrual promotions where the value assigned to the given point type is stored in the transient variable and carried forward to the next promotion for evaluation. When the user selects this action in a promotion, the Siebel Loyalty engine assigns the points as an action of the promotion and it also updates the transient variable for the point type, making the value available to the next promotion in the promotion design.
- **Assign Points.** This action can be used to assign points in the usual way or to use the value stored in one of the transient variables to assign points. In the latter case, you must select Transient Variable as the object.
- **Discount Points**. This action can be used to apply discounts on point prices in a redemption promotion. The discounted price is carried forward by the transient variable associated with the point type to the subsequent promotion, and then the final discount is applied.
- **Discount Points plus (+) Pay**. This action can be used to apply discounts on point-and-pay prices in a redemption promotion. The discounted price is carried forward by the transient variable associated with the point type to the subsequent promotion, and then the final discount is applied.
- **Update Attribute.** This action can be used to track any values during a promotion evaluation You must create your own transient variable using the transient variable framework. In the action setup, you must choose Transient as the object type.

Viewing Transient Variables

Use the following procedure to view the transient variables for a program.

To view existing transient variables

1. Navigate to the Loyalty Program Administration screen.
2. Drill-down on a program.

3. Click the Program Level Attributes tab.
4. Click the Transient Attributes tab.

Defining Transient Variables for Existing Point Types

Transient variables can be added or removed like other program level attributes. When you create a new point type in a program, a new transient variable is automatically created and aligned with that point type. The Point Type field on the Transient Variable list has the same value as the point type that you defined.

If the point type already exists, then you can create a new transient variable and associate it with that point type. It is a one-to-one relationship: a transient variable can only be associated with one point type.

To define a transient variable for an existing point type

1. Navigate to the Loyalty Program Administration screen.
2. Drill-down on a program.
3. Click the Program Level Attributes tab.
4. Click the Transient Attributes tab.
5. Click New.
6. Complete the necessary fields. Some fields are described in the following table.

Field	Description
Name	Name of the transient variable
Point Type	Point type of the transient variable

Note: You must associate the transient variable with a Point Type.

Defining Transient Variables for User-Defined Attributes

Transient variables for user-defined attributes can be defined like other variables and can be of the type integer, text or date. They can be used in a Promotion-Designer-enabled promotion for subsequent promotions to use as input in criteria or actions. Transient variables for user-defined attributes are not created automatically. You can create them using the following procedure.

To define a transient variable for a user-defined attribute

1. Navigate to the Loyalty Program Administration screen.
2. Drill-down on a program.
3. Click the Program Level Attributes tab.
4. Click the Transient Attributes tab.
5. Click New.
6. Complete the necessary fields. Some fields are described in the following table.

Field	Description
Name	Name of the transient variable
Data Type	Transient variable data type
Default Value	Default Value

Examples of Using Transient Variables

This topic provides the following examples of how to use transient variables in the context of a promotion design:

- *Example of Using Transient Variables with Actions of Type Track and Assign Points*
- *Example of Using Transient Variables with Action of Type Assign Points*
- *Example of Using Transient Variables with Actions of Type Discount Points and Discount Points plus (+) Pay*

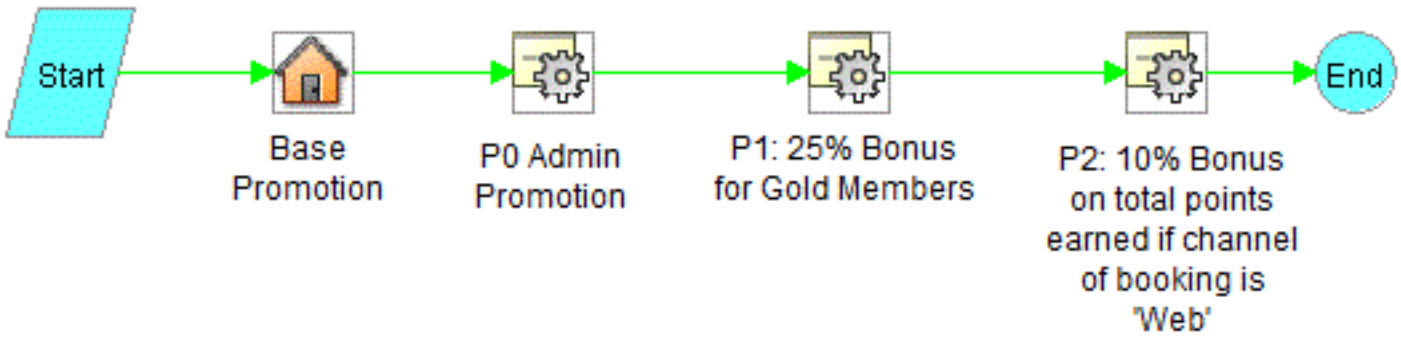
Example of Using Transient Variables with Actions of Type Track and Assign Points

This topic gives one example of how actions of type Track and Assign Points might be used with transient variables. You might use Siebel Loyalty differently, depending on your business model.

An airline rewards program awards its Gold members 25% bonus points on the distance travelled. To encourage members to book tickets online, it awards an additional 10% bonus on the total rewards earned if the channel of booking is Web.

The administrator creates a promotion design that will take all of these promotions into account as accrual promotions, where the value assigned to the given point type is stored in the transient variable and then carried forward to the next promotion for evaluation.

From first to last, the administrator includes the following promotion design objects: Start, Base Promotion, P0: Admin Promotion, P1: 25% Bonus for Gold Members, P2: 10% Bonus on total points earned if Channel of Booking is 'Web', End. This promotion design is shown in the following image.



These promotions use the Track and Assign Points action with Transient as its object, so the value accumulates in the transient variable. Each promotion adds the new bonus that it calculates to the bonus that is already stored in the transient variable. The final promotion uses the Assign Points action, so it assigns the customer the entire bonus that accumulated value in the transient variable.

Using *P0: Admin Promotion* as the base promotion, the administrator can calculate the distance travelled. In this admin promotion she uses a Track and Assign points action. This action internally updates the transient variable associated with the point type. While defining *P0: Admin Promotion*, she creates an action and assigns values to the fields as defined in the following table.

Field	Value
Sequence Number (#)	1
Name	Track and Assign points
Type	Track and Assign Points
Expression	[Transaction.Filed.Points]
Point Type	Regular
Object	Transaction
Attribute	Transaction Point

In the promotion *P1: 25% Bonus for Gold Members*, a criterion is defined to verify the member tier. The action updates the transient variable to reward members 25% bonus points on miles travelled. Because the subsequent promotion requires the total points earned, use the Track and Assign points action for this promotion. The action for this promotion has the field values shown in the following table.

Field	Value
Sequence Number (#)	1
Name	Track and Assign
Type	Track and Assign Points
Point Type	Regular
Object	Transient
Attribute	Regular Point TV

Field	Value
Operator	Multiply
Value	.25

In the promotion *P2: 10% Bonus* on total points earned if channel of booking is Web, a criterion is defined to check the ticket class. The action assigns points to reward members 10% bonus points on the total points earned so far in the promotion design. If the channel of booking is Web, then the promotion executes the action with the field values shown in the following table.

Field	Value
Sequence Number (#)	1
Name	Assign Points
Type	Assign Points
Point Type	Regular
Object	Transient
Attribute	Regular Point TV
Operator	Multiply
Value	.1

The following table explains how points are assigned in this scenario based on 2000 base points.

Promotion	Action	Rewards	Value of Transient Variable	Explanation
Base Promotion	Calculate Base Price	Not applicable	Not applicable	• Base points earned is 2000 • Point Type is Regular
P0: Admin Promotion	Track & Assign Points	2000	2000	The Track & Assign points action assigns a value to the transient variable defined by the point type used in the Base and Admin promotions. In this case it is defined as type Regular. For more details about the action refer to the previous table.

Promotion	Action	Rewards	Value of Transient Variable	Explanation
P1: 25% Bonus for Gold Members	Track & Assign Points Transient variable is multiplied by 0.25	2000 times 0.25 equals 500	2000 plus 500 equals 2500	In this promotion the transient variable is multiplied by 0.25. The action then updates the transient variable with the resulting value 2500. For more details about the action, refer to the previous table.
P2: 10% Bonus on total points earned if Channel of booking is Web	Track & Assign Points Transient variable is multiplied by 0.1	2500 times 0.1 equals 250	2500 plus 250 equals 2750	In this promotion the transient variable is multiplied by 0.1. The Assign Points action can be used here, because there are no subsequent promotions in the promotion design. This action assigns all the points that have accumulated in the transient variable to the customer. For more details about the action, refer to the previous table.

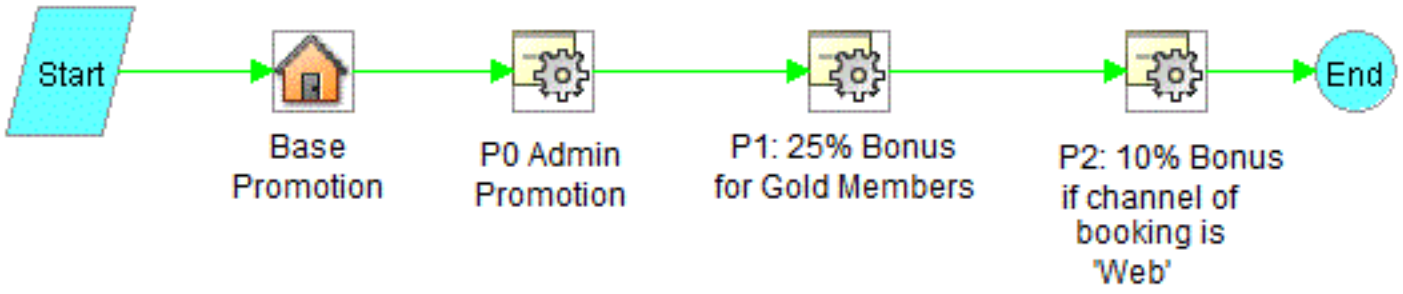
Example of Using Transient Variables with Action of Type Assign Points

This topic gives one example of how actions of type Assign Points might be used with transient variables. You might use Siebel Loyalty differently, depending on your business model.

An airline rewards program awards its gold members 25% bonus points on distance travelled and 10% bonus points on distance travelled if the channel of booking is Web.

The administrator sets up a promotion design that takes all of these promotions into account using accrual promotions with actions of type Assign Points. This type of action is used because the value of the reward is not required by subsequent promotions in the promotion design. In this case, the administrator is explicitly required to select Transient Variable as the object for the action.

From start to finish, the administrator includes the following promotion design objects: Start, Base Promotion, P0: Admin Promotion, P1: 25% Bonus for Gold Members, P2: 10% Bonus if Channel of Booking is 'Web', End. The promotion design is shown in the following image.



These promotions are similar to the promotions used in the previous scenario, except that they use the Assign Points action so the points assigned by each promotion are based only on the original value of the transaction points, not on the subsequent bonus added by each promotion.

Using the Base Promotion, the administrator can calculate the distance travelled. In the P0: Admin Promotion she uses the Track and Assign points action. This action internally updates the transient variable associated with the point type. The *P0: Admin Promotion* includes an action with the field values shown in the following table.

Field	Value
Sequence Number (#)	1
Name	Track and Assign points
Type	Track and Assign Points
Expression	[Transaction.Filed.Points]
Point Type	Regular
Object	Transaction
Attribute	Transaction Point

In the promotion *P1: 25% Bonus for Gold Members*, the administrator sets up the criteria to verify the member tier and creates an action of type Assign Points in order to reward members 25% bonus points on miles travelled.

Note: Because the subsequent promotion requires the distance travelled the administrator uses an action of type Assign Points. Do not use an action of type Track and Assign Points with this promotion. Doing so would erroneously update the transient variable with total points earned.

Keeping these factors in mind, while defining *P1: 25% Bonus for Gold Members* promotion, she creates an action with the field values shown in the following table.

Field	Value
Sequence Number (#)	1
Name	Assign points
Type	Assign Points
Point Type	Regular
Object	Transient

Field	Value
Attribute	Regular Point TV
Operator	Multiply
Value	.25

In the promotion *P2: 10% Bonus* if Channel of Booking is Web, the administrator sets up the criteria to verify the ticket class and uses an action of type Assign Points in order to reward member 10% bonus points on miles travelled. The action, which is applied only if the ticket is booked on the Web, has the field values shown in the following table.

Field	Value
Sequence Number (#)	1
Name	Assign Points
Type	Assign Points
Point Type	Regular
Object	Transient
Attribute	Regular Point TV
Operator	Multiply
Value	.1

The following table displays points how points are assigned in this example based on 2000 base points. Additional information about the tracking and assigning of points appears in the Explanation column.

Promotion	Action	Rewards	Value of Transient Variable	Explanation
Base Promotion	Calculate Base Price	Not applicable	Not applicable	• Base points earned is 2000 • Point Type is Regular
P0: Admin Promotion	Track & Assign Points	2000	2000	The Track & Assign points action assigns a value to the transient variable defined by the point type used in Base and Admin

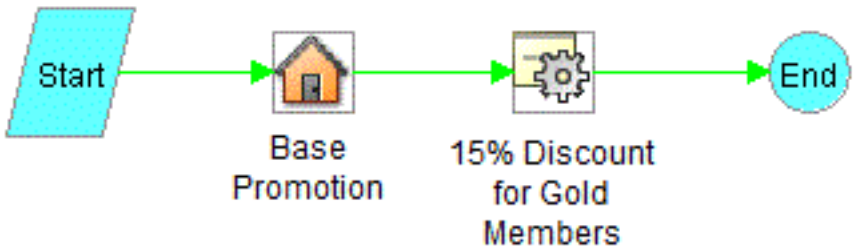
Promotion	Action	Rewards	Value of Transient Variable	Explanation
				promotions. In this case it is defined as type Regular. For more details about the action refer to the previous table.
P1: 25% Bonus for Gold Members	Assign Points Transient variable is multiplied by 0.25	2000 times 0.25 equals 500	2000	In this promotion the transient variable is multiplied by 0.25. The Assign Points action assigns 500 points to the member but does not update the variable. For more details about the action, refer to the previous table.
P2: 10% Bonus if Channel of booking is 'Web'	Assign Points Transient variable is multiplied by 0.1	2000 times 0.1 equals 200	2000	In this promotion the transient variable is multiplied by 0.1. The Assign Points action assigns 200 points to the member but does not update the variable. For more details about the action, refer to the previous table.

Example of Using Transient Variables with Actions of Type Discount Points and Discount Points plus (+) Pay

This topic gives one example of how actions of type Discount Points and Discount Points plus (+) Pay might be used with transient variables. You might use Siebel Loyalty differently, depending on your business model.

An airline rewards program has a promotion offering its gold members a 15% discount on the redemption price for flights from SFO to BOS.

The administrator sets up a promotion design that redeems the appropriate number of points from the member. From start to finish, the administrator includes the following objects in the redemption promotion design: Start, Base Promotion, 15% Discount for Gold Members, End. This promotion design is shown in the following figure.



The Base Promotion, offers one of the following base redemption price options to members:

- Redeem 1000 points

- Redeem 700 points and pay $100

The output of the base redemption promotion is assigned to a transient variable associated with the appropriate point type, depending on the chosen option.

In the Base Promotion, the administrator creates two actions: the Redeem Points Action and the Redeem Points plus (+) Pay Action. The following table shows the field values used for the Redeem Points Action.

Field	Value
Sequence Number (#)	1
Name	Redeem points
Type	Redeem Points
Expression	1000
Point Type	Regular
Value	1000

The following table shows the field values used for the Redeem Points plus (+) Pay Action.

Field	Value
Sequence Number (#)	2
Name	Redeem points plus Pay USD
Type	Redeem Points plus (+) Pay
Expression	700
Point Type	Regular
Value	700
Amount	100
Currency	USD

The 15% Discount for Gold Members promotion in the promotion design uses actions of both the Discount Points and Discount Points plus (+) Pay type to award discounts to the members on redemption.

In the *15% Discount for Gold Members* promotion, the administrator creates two actions: the Discount Points Action and the Discount Points plus (+) Pay Action. The following table shows the field values used for the Discount Points Action.

Field	Value
Sequence Number (#)	1
Name	Discount points
Type	Discount Points
Expression	[Transient.Field.Point 1 Value] * 0.15
Point Type	Regular
Object	Transient
Attribute	Regular
Operator	Multiply
Value	.15

The following table shows the field values used for the Discount Points plus (+) Pay Action.

Field	Value
Sequence Number (#)	2
Name	Discount points plus USD
Type	Discount Points plus (+) Pay
Expression	[Transient.Field.Point 1 Value] * 0.85
Point Type	Regular
Object	Transient
Attribute	Regular
Operator	Multiply

Field	Value
Value	.15
Currency	USD
Operator	Multiply
Value	.85

The following table displays how points are redeemed based on the promotion design with the actions in this example.

Promotion	Action	Redemption Price	Value of Transient Variable	Explanation
Base Promotion	Redeem Points	1000 points	1000	The action assigns 1000 as the value of the transient variable. For more details about the action, refer to the previous table.
Base Promotion	Redeem Points plus (+) Pay	700 points $100 USD	700	The action assigns 700 as the value of the transient variable. The dollar value is tracked internally by the application. For more details about the action, refer to the previous table.
15% Discount for Gold Members Promotion	Discount Points	1000 minus (1000 times 0.15) equals 850 points	850	This action awards a discount of 15% on the points redeemed, and assigns 850 as the value of the transient variable. For more details about the action, refer to the previous table.
15% Discount for Gold Members Promotion	Discount Points plus (+) Pay	700 minus (700 times 0.15) equals 595 points 100 times 0.85 equals $85 USD	595	This action awards a discount of 15% on the points redeemed and assigns 595 as the value of the transient variable. The dollar value is tracked internally by the application. For more details about the action, refer to the previous table.

About Hierarchical Rules for Loyalty Promotions

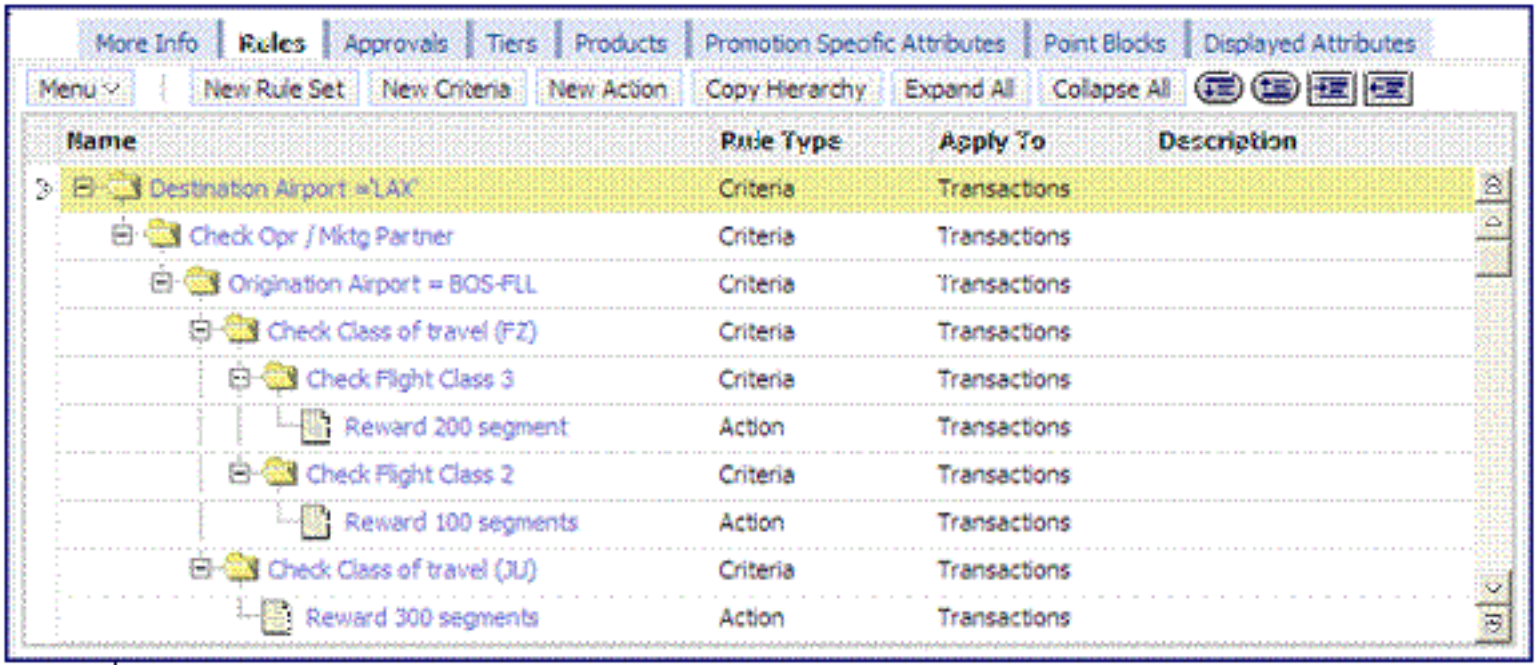
If you have a complex promotion with many rules, then it might be difficult to create individual rules using the method described in *Creating Rules for Loyalty Promotions*, because it involves a large amount of repetition. Rules hierarchies allow you to reduce this repetition as follows:

- You can nest rules to create tree like structure of rule criteria and actions.
- Rule criteria are set up as tree branches, and each branch ends with an action leaf.

Rule hierarchies have the following benefits:

- They significantly reduce the number of rules required in complex promotions.
- The engine evaluates the rules by following the tree structure, reducing the time taken to evaluate the rules of the promotion.

The following image shows the interface used for creating hierarchical rules.



Benefits of Hierarchical Rules

This example shows the benefits of hierarchical rules.

You have a promotion with three variables and three possible conditions for each:

- **Time of Departure (TD).** Possible conditions are TD < 6AM, 6AM < TTD < 11PM, TTD > 11PM.
- **Number of Available Seats (NAS).** Possible conditions are NAS <10, 10 < NAS < 20, NAS >20
- **Load Factor (LF).** Possible conditions are LF < 60, 60 < LF < 90, LF >90.

If you wrote a separate rule for every possible combination of these conditions, then you would have to write 27 rules. If you had a fourth variable, also with three possible conditions, then you would have to write 81 rules. The same criteria would be repeated in many rules.

This repetition makes it difficult for the Loyalty administrator to enter the rules, and it slows processing because the engine must process each criterion separately.

If you use hierarchical rules, then:

- The first level of the hierarchy includes the three conditions for TD.
- The second level of the hierarchy includes the three conditions for NAS. These are entered for each of the three conditions for TD.
- The third level of the hierarchy includes the three conditions for LF. These are entered for each of the 9 conditions of NAS.

The third level of the hierarchy includes all 27 combinations of the conditions, but the three rules in the first level are only entered once each, and the three rules in the second level are only entered three times each. By contrast, with conventional, non-hierarchical rules, you would have to enter all the conditions nine times each.

Creating Eligibility Promotions

An eligibility promotion is a promotion that has rules and criteria but does not have any actions. These types of promotions are used to check the eligibility of a particular member who might be entitled to get a specific set of promotional benefits. For example, it can be used if a set of promotions are only applicable to residents of US who are over the age of 18.

Eligibility promotions must be used exclusively in Promotion Designer: the eligibility promotion is executed before the reward promotions in the promotion design, to restrict the reward promotions to a category of members. The subsequent promotions in the promotion design are executed only if the member meets the criteria in the eligibility promotion. For information about Promotion Designer, and how it relates to eligibility promotions, refer to *Using Promotion Designer*.

Eligibility promotions help to improve performance and ease the setup of promotions because you will no longer need to include these criteria in each individual reward promotion you create.

Return Values of Eligibility Promotions

Since eligibility promotions do not have user defined actions associated with them, they return only two possible values:

- **Success**. When one or more rules are satisfied.
- **Failure**. When no rules are satisfied.

Based on these status codes, Siebel Loyalty can decide whether to further process the promotion design for the related transaction.

> **Note:** An eligibility promotion is evaluated only if it is a part of a promotion design. It is not evaluated during normal processing of transactions, even if it has been marked as Active.

Procedure for Creating Eligibility Promotions

An eligibility promotion is created like a reward promotion, with the following key differences:

- Eligibility Promotions are accessed in the Eligibility Promotions view of the Loyalty Promotions Administration screen, rather than the Promotions view. The Eligibility Promotions view is similar to the Promotions view. When you create an eligibility promotion in this view, the Type field is automatically set to Eligibility to distinguish it from other promotions.
- Eligibility promotions have rules and criteria but do not have actions.

Note: Siebel Loyalty does not support using eligibility rules based on the values assigned to the Account Address or the Household Address attributes.

To create an Eligibility Promotion

1. Navigate to the Loyalty Promotions Administration screen, then the Eligibility Promotions view.
2. Perform the tasks outlined in step 1 through step 6 in *Process of Creating Loyalty Promotions*. Wherever the instructions refer to the Promotions screen, use the Eligibility Promotions screen instead.

   You can define rules and criteria for Eligibility Promotions by selecting the Eligibility Promotion name. You are redirected to a new view where you can define rules and criteria in the same way as for non-eligibility promotions.

   Note: Eligibility promotions do not have user defined actions associated with them and therefore do not require defined actions.
3. After creating the eligibility promotion, you must create a promotion design that includes the eligibility promotion and other promotions. Subsequent promotions in the promotion design are executed only for members who meet the criteria of the eligibility promotion.

   For information about creating a promotion design and inserting an eligibility promotion in it, refer to *Using Promotion Designer*.

Specifying the Tiers Applicable to Loyalty Promotions

If promotions apply only to members in certain tiers, then you must specify those tiers in the Tiers view of the Loyalty Promotions screen. When you specify tiers, only members in those tiers can be enrolled in the promotion, and the promotion is only visible to members in those tiers when members use eLoyalty.

For example, if a promotion applies only to Platinum members, then add the Platinum tier to the Tiers list. If a member is not in the Platinum tier, then the customer service representative cannot enroll that member in the promotion, and only Platinum members can see this promotion on the eLoyalty Member Portal.

If you do not specify any tiers here, then the promotion applies to members in all tiers and is visible to all members in eLoyalty.

If a promotion requires enrollment, then you must list the tiers here. Only members in these tiers can enroll in the promotion.

This task is a step in *Process of Creating Loyalty Promotions*. This task applies only to tier promotions.

To specify the tiers a promotion applies to

1. Navigate to the Loyalty Promotions Administration screen.
2. In the Promotions list, find the promotion for which you want to specify tiers and click the hyperlink in its Promotion Number (#) field.
3. If the promotion form's Active check box is selected, then click Modify.
4. Click the Tiers view tab.
5. Add one or more records to the Tiers list, and complete the necessary fields.

Creating Incentives to Enroll in Promotions

If members must enroll in a promotion to benefit from it, then you can also optionally create rewards that are incentives for members to enroll in this promotion.

For example, if a member enrolls in a promotion, then you might give the member a choice of purchasing 5000 miles or a 1000 mile voucher at a discount price.

To set up incentives, you use the promotions screen to define the incentives that are displayed when you enroll a member in a promotion. When you create the incentives in the Loyalty Promotions Administration screen, enter the text that is displayed when you enroll a member in a promotion.

For information about how the customer service offers members these incentives while enrolling members in promotions, see *Enrolling Members in Loyalty Promotions*.

To specify incentive choices

1. Navigate to the Loyalty Promotions Administration screen.
2. In the Promotions list, find the promotion for which you want to specify choices and click the hyperlink in its Promotion Number (#) field.
3. If the promotion form's Active check box is selected, then click Modify.
4. If necessary, select the Enrollment Required checkbox.

   Promotion incentives only apply to promotions where enrollment is required.
5. Click the Incentive Choices view tab.
6. Add one or more records to the Incentives Choices list, and complete the necessary fields.

   The values you enter in both the Incentive Choice and the Description field are displayed when the member enrolls in the promotion.
7. Click Activate.
8. In the Incentive Choices view, click Create Attribute.

   A member attribute named Incentive Choice-(Promotion Number) is created in the Program screen, Program Level Attributes, Member Attributes view. You use this attribute in the administrative promotion that allows enrollment in this promotion, as described in *Creating the Admin - Points Reactivation Promotion*.

About Rules Libraries for Loyalty Promotions

Rules Libraries allow you to save criteria and actions of Siebel Loyalty promotions, and then reuse them when defining subsequent rules. They are saved in Criteria Library sets and Action Library sets, and are stored as library objects that can then be used when creating new promotions.

Using rules libraries can save time, and minimize errors made during the process of setting up promotions. You can search through existing criteria and actions using the Promotion Criteria Search view and Promotion Actions Search view. Additionally you can import a set of criteria or a set of actions from a saved library while setting up rules.

The following topics discuss how to work with rules libraries:

- *Managing Criteria Library Sets*
- *Managing Action Library Sets*
- *Advanced Options for Library Sets*

Managing Criteria Library Sets

This topic includes instructions for creating, saving and importing criteria library sets. For additional information about rules libraries, refer to *About Rules Libraries for Loyalty Promotions*.

Creating Criteria Library Sets

Use the following procedure to create a criteria library set.

To create a new criteria library set

1. Navigate to the Loyalty Promotions Administration screen, then the Criteria Library view.
2. Click New to create a new record.
3. Complete the necessary fields described in the following table.

Field	Description
Name	Name the Criteria Library set. **Note:** The name must be unique.
Library Category	Select the Library Category type.
Description	Describe the Criteria Library set.
Program Name	Enter the Program Name in which the Criteria Library set can be used.
Apply To	Select the Apply To type.

Field	Description

4. Create one or more criteria to the Criteria Library set created in step 3.

   Create the criteria as you would normally. For information more about creating criteria, refer to *Creating Criteria for Loyalty Promotion Rules*.

Saving Criteria Library Sets

Use the following procedure to save a criteria library set.

To save a criteria library set using existing criteria

1. Navigate to the Loyalty Promotions Administration screen, then the Promotions view.
2. Select a promotion.
3. Select the Rules tab.
4. Click on an existing rule.
5. Select the Criteria tab.
6. Control click one or more criteria.
7. Click Save as Library.
8. Complete the necessary fields described in the following table.

Field	Description
Name	Name the Criteria Library set. **Note:** The name must be unique.
Library Category	Select the Library Category type.
Description	Describe the Criteria Library set.

9. Click Create Library.

Importing Criteria Library Sets

Use the following procedure to import a criteria library set.

To import a criteria library set into a promotion

1. Navigate to the Loyalty Promotions Administration screen, then the Promotions view.
2. Select a promotion.
3. Select the Rules tab.
4. Add a new record to the Rules list, and complete the necessary fields described in the following table.

Field	Description
Sequence Number (#)	Enter the sequence in which Siebel Loyalty evaluates the rules of the promotion.
Name	The name given to the rule.
Apply To	If this rule is used in a loyalty promotion, then select either Transactions or Attributes to specify which of these the rule applies to. If this rule is used in a tier promotion, then this field is read only and displays Tiers.

> **Note:** The Apply To field must be the same as the Apply To for the criteria library set that you want to import.

5. Click on the rule created in step 4.
6. Select the Criteria tab.
7. Click Import Library.

   A list of available libraries appears, and is filtered based on the Apply To field of the promotion.
8. Select a library, then click Import Library.

   The criteria from the selected library appear in the criteria list.

Managing Action Library Sets

This topic includes instructions for creating, saving and importing action library sets. For additional information about rules libraries, refer to *About Rules Libraries for Loyalty Promotions*.

Creating Action Library Sets

Use the following procedure to create an action library set.

To create a new action library set

1. Navigate to the Loyalty Promotions Administration screen, then the Action Library view.
2. Click New to create a new record.
3. Complete the necessary fields described in the following table.

Field	Description
Name	Name the Action Library set. **Note:** The name must be unique.
Library Category	Select the Library Category type.

Field	Description
Promotion Base Flag	Check box when the Action library is for a base promotion or non-base promotion that has a separate set of actions
Description	Describe the Action Library set.
Loyalty Program	Enter Loyalty Program in which the Action Library set can be used.
Apply To	Select the Apply To type.

4. Create one or more actions in the action library set created in step 3.

   Create the criteria as you would normally. For information more about creating criteria, refer to *Creating Actions for Loyalty Promotion Rules*.

Saving Action Library Sets

Use the following procedure to save an action library set.

To save an action library set using existing actions

1. Navigate to the Loyalty Promotions Administration screen, then the Promotions view.
2. Select a promotion.
3. Select the Rules tab.
4. Click on an existing rule.
5. Select the Actions tab.
6. Control click one or more actions.
7. Click Save as Library.
8. Complete the necessary fields described in the following table.

Field	Description
Name	Name the Action Library set. **Note:** The name must be unique.
Library Category	Select the Library Category type.
Description	Describe the Action Library set.

9. Click Create Library.

Importing Action Library Sets

Use the following procedure to import an action library set.

To import an action library set into a promotion

1. Navigate to the Loyalty Promotions Administration screen, then the Promotions view.
2. Select a promotion.
3. Select the Rules tab.
4. Add a new record to the Rules list, and complete the necessary fields described in the following table.

Field	Description
Sequence Number (#)	Enter the sequence in which Siebel Loyalty evaluates the rules of the promotion.
Name	The name given to the rule.
Apply To	If this rule is used in a loyalty promotion, then select either Transactions or Attributes to specify which of these the rule applies to. If this rule is used in a tier promotion, then this field is read only and displays Tiers.

> **Note:** The Apply To field must be the same as the Apply To for the actions library set that you want to import.

5. Click on the rule created in step 4.
6. Select the Actions tab.
7. Click Import Library.

   A list of available libraries appears.
8. Select a library, then click Import Library.

   The actions from the selected library appears in the actions list.

Advanced Options for Library Sets

This topic includes information about searching through criteria library sets and action library sets. For additional information about rules libraries, refer to *About Rules Libraries for Loyalty Promotions*.

Searching Through Existing Criteria

Use the following procedure to search through existing criteria.

To search through existing criteria

1. Navigate to the Loyalty Promotions Administration screen, then the Promotion Criteria Search view.
2. Click Query.
3. Enter your search criteria into one or more of the available fields.

4. Click Go.

Searching Through Existing Actions

Use the following procedure to search through existing actions.

To search through existing actions

1. Navigate to the Loyalty Promotions Administration screen, then the Promotion Actions Search view.
2. Click Query.
3. Enter your search criteria into one or more of the available fields.
4. Click Go.

Formulas in Siebel Loyalty

The following topics include information about formulas:

- *Overview of Formulas*
- *About the Formula Builder*
- *About Formula Validation*
- *Building Formulas*
- *Associating a Formula with a Promotion*

Overview of Formulas

Formulas allow you to create and store a set of objects and operators specific to a Loyalty Program. You can calculate values based on input from third parties and then take the resulting value into account within a promotion. Similarly to other objects, formulas are available for use in other promotions.

For example, a formula can calculate the average amount spent by a member in a specified period. Then the criteria can check whether the formula is greater than a predetermined dollar amount and have an action to reward a member a percentage of the formula value.

Formulas have the following characteristics:

- **Associated with one Loyalty Program**. A formula can be available for use by a promotion only if it is associated with the same Loyalty Program as that promotion.
- **Comprised of a series of operators and objects.** A formula contains logical mathematical operators, numbers, and objects representing defined attributes and numeric values. It can be defined only using attributes of type number or integer.
- **Validated**. The formula must be a valid mathematical formula. If the formula does not adhere to mathematical rules, then it is invalid and cannot be used.
- **Used in promotions criteria and actions**. Once validated, a formula is available for use in promotion criteria and actions. When used in promotion criteria and actions, the object is the formula and the attributes are a list of user-defined formulas.

About the Formula Builder

The Formula Builder enables you to define complex formulas using all the attributes defined and visible at the Loyalty Program level in combination with the following operators:

- + (plus sign) Addition
- - (minus sign) Subtraction
- * (asterisk) Multiplication:
- / (backslash) Division
- (Opening Parenthesis
-) Closing Parenthesis

The formula builder is the main Formula definition screen that enables you to define the basic formula, associate it with the correct Loyalty Program and provide a description of how the formula is used. Selecting the Formula name on the Loyalty Promotions Administration - Promotion Formula screen takes you to the formula builder screen.

The Formula Builder has the following characteristics:

- You build the formula by adding rows in sequence to the formula builder. Some operators apply to objects and attributes, but others (such as the opening and closing parenthesis) do not.
- A formula row can include an Object and Attribute combination or a Literal and Value combination in addition to its operator. Depending on the choice, the necessary fields become conditionally mandatory and can be updated. For example, if you choose Literal in the Object field, then you must enter a number in the value field and the Attribute field is grayed out.
- A formula row can have an opening or closing parenthesis. Rows with a parenthesis cannot contain any other attribute or mathematical operator.
- The sequence number of the line automatically increments by one for each new line you add.
- The rows of the formula are sorted by sequence number in ascending order to generate the final formula. You can manually update the sequence number field to change the formula.

About Formula Validation

The formula expression is validated when you update any of the steps of the formula. The current validation status is shown in the Validation Status bar in the Formula Builder. A Validation Status of Green (where the status bar appears in the color green) signifies that the formula is valid. A Validation Status of Red (where the status bar appears in the color red) signifies that the formula is invalid.

A Validate button is available in the Formula Builder. If you click the button, then you are prompted with the line and place where the error occurs and a description of the error. This button is only enabled when a formula is invalid.

Building Formulas

This topic includes instructions about building a formula.

To build a formula

1. Navigate to the Loyalty Promotions Administration screen, then the Formula view.
2. Click New to create a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Description
Name	Name of the formula
Program Name	Program name with which to associate the formula
Description	Brief description of the formula

3. Click the Name of the formula created in step 3.
4. In the Promotion Formula Builder, define the formula operators and attributes:

   a. Click New.
   b. Complete the necessary fields. Some fields are described in the following table.

Field	Description
Sequence	Sequence number of the row
Operator	Mathematical operator
Object	Select from Literal, Member, Member Tier, Promotion and Transaction
Attribute	Attribute name
Value	Numeric value for Literal-type objects

   c. Repeat step a and step b for each operator or attribute in the formula.
5. Ensure that the formula is a valid mathematical equation:

   a. If the Validate button is inactive (grayed out) and the Validation Status is Green (where the status bar appears in the color green), then skip to step 7.
   b. Click Validate.

      A information message appears indicating the likely cause of the invalid formula.
   c. Correct the issues specified in the information message.

d. Repeat step b and step c until the Validate button is inactive (grayed out) and the Validation Status is Green (where the status bar appears in the color green).

6. Click Menu, and select Save Record.

Associating a Formula with a Promotion

This topic includes instructions about associating a formula with a promotion.

To associate a formula at the promotion level

1. Navigate to the Loyalty Promotions Administration screen, then the Promotions view.
2. Select a Promotion.

   Note: The Promotion that you select must have the same Program as the formula you intend to use.

3. Click the Rules tab.
4. Click New to create a new record.
5. Complete the necessary fields. Some fields are described in the following table.

Field	Description
Sequence	Sequence number of the row
Name	Name of the rule
Apply To	Choose to apply to Transactions or Attributes
Description	Description of the rule

   Note: To use a formula in the rule, you must select Transactions for the Apply To field.

   For detailed instructions about creating rules and criteria, refer to *Creating Rules for Loyalty Promotions* and *Creating Criteria for Loyalty Promotion Rules*.

6. Click the name of the rule that you defined in step 5.
7. Select Formula from the Object menu.
8. Specify the name of the formula in the Attribute field.
9. Navigate to the Loyalty Promotions Administration screen, then the Promotions view.

   Notice that the promotion objects have a new Object Type called Formula and that the attributes field displays the formula created. The formulas can now be used in criteria for comparisons and in actions for assuaging values or updating attributes with formula value.

About Simulating Loyalty Transactions

Siebel Loyalty can be used to simulate transactions to determine the effects that new promotions create. This functionality is described in the following topics:

- *Overview of Transaction Simulation*
- *Simulating a Single New Transaction*
- *Simulating a Set of Transactions Imported froman External Source*
- *Viewing Bulk Transaction Simulation History*
- *Simulating Existing Processed Transactions*
- *Configuring Summary XML File Destinations for Simulations*

Overview of Transaction Simulation

Transaction simulation can help you understand the impact that promotions will have on Siebel Loyalty transactions when the promotions are made active. Transaction simulations can be created from the following sources:

- Single new transaction
- Transactions imported from other sources in CVS or XML formatted files
- Set of transactions that have already been processed

The information summary in the output of transaction simulation includes:

- Failed promotions
- Transaction summary
- Successful promotions
- Not Qualified promotions

Each of these summary sections contains detailed information about the number or points accrued or redeemed and about vouchers used if same voucher is assigned for all transactions. Other action results, such as attribute updates are summarized separately.

For successful promotions, the output contains a detailed summary of the rules, criteria and actions that were processed for successful promotions. For promotions that returned a Not Qualified status, the output includes reasons why the rules did not qualify and why the criteria failed.

The output is called an engine waterfall, because it shows all the steps that the Siebel Loyalty engine took to calculate the final value of the promotion for that transaction.

The simulation result can be saved as XML files. For information about configuring the path location where these files are saved, refer to *Configuring Summary XML File Destinations for Simulations*.

Simulating a Single New Transaction

Use the following procedure simulate a single new transaction.

To perform a single new transaction simulation

1. Navigate to the Loyalty Program Administration screen, then the Programs view.
2. Drill-down on a program.
3. Click the Simulate Transaction Details tab.
4. Click Simulate New Transaction.
5. Click New.
6. Add the columns that you require.

   > **Note:** If a column is not visible, then it has not yet been added. You must add the column before adding the transaction details.

7. Enter the transaction details.
8. Click Simulate
9. View the results in the Log applet.
10. Click Save To file to save the simulated data to an XML file.

    For information about configuring the destination folder for the XML file, refer to *Configuring Summary XML File Destinations for Simulations*.

Simulating a Set of Transactions Imported from an External Source

Use the following procedure to perform a simulation of a set of transactions imported from an external source.

To perform a bulk transaction simulation imported from an external source

1. Navigate to the Loyalty Promotions Administration screen, then the Programs view.
2. Click a Program ID.
3. Select the Simulate Transaction Details tab.
4. Select the Simulate Bulk Transactions tab.
5. Select the Input Format from the list.
6. Specify the Reason Code, by selecting an item from the list of values, or by typing in a new value.
7. Enter the output Batch Size

   > **Note:** The Status field remains as New until it is simulated.

8. Enter the full path and file name of the transaction source in the File text box.

   > **Note:** The file type must match the Input Format entered in step 5.

9. Click Simulate.

   An XML file is generated with a summary of the bulk transaction simulation.

   For information about configuring the destination folder for the XML file, refer to *Configuring Summary XML File Destinations for Simulations*.

Viewing Bulk Transaction Simulation History

Use the following procedure to view the bulk transaction simulation history.

To view bulk transaction simulation history

1. Navigate to the Loyalty Program Administration screen, then the Programs view.
2. Drill-down on a program.
3. Click the Bulk Membership Administration tab.
4. Click the Bulk Action History sub-tab.

   All simulation history is displayed. The Bulk Reference ID is associated with each file generated in the simulation.

   > **Note:** You can sort the transactions by Status to group new, failed and processed transactions together.

Simulating Existing Processed Transactions

This topic explains how to perform a simulation using existing processed transactions.

To perform a simulation of existing transactions

1. Navigate to the Loyalty Promotions Administration screen, then the Programs view.
2. Click a Program ID.
3. Select the Simulate Transaction Details tab.
4. Select the Simulate Existing Transactions tab.
5. Query to find the transactions that you want.

   > **Note:** Only processed transactions are searched.

6. Select one or more transactions.
7. Click Simulate.
8. Enter the Output Batch Size and Reason code in the Output Batch Size dialog box.
9. Click Submit.
10. To view the simulation result, navigate to the Loyalty Transaction screen, then the Transaction Id, and Detailed Processing Log view.

    Simulations of existing transactions are not saved as XML files and can only be seen in this view.

Configuring Summary XML File Destinations for Simulations

This topic explains how to modify the destination location for XML summary files generated for simulations.

The default destination is on the server, and it is recommended that you do this configuration because some users do not have access to the server.

Note: Write access must be granted to the folders that are used to store output files.

The number of files generated depends on the output batch size. For example, if there are 300 transactions and the output size is 10, then 30 files will be created.

The naming of the file for bulk transaction simulations uses the following form:

SimulationResults_<Bulk Ref ID>_<Output Batch Size Num>.XML

Single transaction simulation is not saved automatically, but the user can choose to save it in a file. You can modify the location where the user is prompted to save the file.

You can refer to the Bulk Action History list applet to find the Bulk Reference ID. For information about accessing this list, refer to *Viewing Bulk Transaction Simulation History*.

Modifying the XML Output File Destination for Bulk Transaction Simulations

Perform the steps in the following procedure to modify the XML output file destination for bulk transaction simulations.

To modify the XML output file destination for bulk transaction simulations

1. Select the LOY Bulk Simulation Process workflow in Siebel Tools.
2. Query for the PathName process property.
3. Update the value of the PathName process property to the desired destination path.
4. Activate and deploy the workflow.

Modifying the XML Output File Destination for Single Transaction Simulations

Perform the steps in the following procedure to modify the XML output file destination for single transaction simulations.

To modify the XML output file destination for single transaction simulations

1. Select the LOY Simulate Single Txn business component in Siebel Tools.
2. Query for the File user property.
3. Update the value of the File user property to the desired destination path.
4. Deliver the business component to the Siebel runtime repository.
5. Restart the services.

About Adding Marketing Information to Loyalty Promotions

When you create a promotion, you can add goals, assumptions, expenses, purchase requests, and Market Development Fund (MDF) requests to it. These items are particularly useful if you use Siebel Marketing in conjunction with Siebel Loyalty.

You can add marketing information to loyalty promotions in the following ways:

- *Evaluating and Segmenting Members of Loyalty Programs*
- *Creating Goals and Assumptions for Loyalty Promotions*
- *Adding Expenses and Line Items to Loyalty Promotions*

- *Adding Purchase Requests to Loyalty Promotions*
- *Adding Market Development Fund Requests to Loyalty Promotions*
- *Associating Loyalty Members with Marketing Campaigns*

For more information about Siebel Marketing, see *Siebel Marketing Installation and Administration Guide* and *Siebel Marketing User Guide* .

Evaluating and Segmenting Members of Loyalty Programs

You can evaluate and segment members using Oracle Business Intelligence or third-party analytics products, in order to decide which members promotions must target. Based on this segmentation, assign the members to groups, classes, and phases, so different promotions can target these different member groupings.

Calculating Member Value

You can track two values for a member:

- **Value Score.** This field in the short Member Form Applet drives the dollar sign graphic at the start of this form, which quickly shows the user the member's value.
- **Lifetime Value Score.** This field in the Member More Info form enables you to track the member's lifetime potential value in addition to the value a member is delivering at this time, which is tracked in the Value Score field.

Calculate member value with a third-party application that uses the data in Siebel Loyalty and external data if desired.

Assigning Members to Groups, Classes, and Phases

Oracle Business Intelligence or the third-party application that segments the member base assigns members to applicable groups, classes, or phases.

The Group, Class, and Phase fields are in the Member screen, More Info view. Without configuration, these fields are read-only, since the assumption is that the third party application assigns members these values.

Creating Goals and Assumptions for Loyalty Promotions

You can create one or more goals for a promotion. For each goal, you can create one or more assumptions.

> **Note:** To create goals and assumptions for a promotion, you must first associate the promotion with a marketing campaign. For instructions on associating Siebel Loyalty promotions with Siebel Marketing campaigns, see the chapter on planning and budgeting in *Siebel Marketing User Guide* .

Creating Goals for a Loyalty Promotion

The following procedure describes how to create goals for a loyalty promotion.

To create goals for a loyalty promotion

1. Navigate to the Loyalty Promotions Administration screen.
2. In the Promotions list, find the promotion to which you want to add goals and click the hyperlink in its Promotion Number (#) field.
3. If the promotion form's Active check box is selected, then click Modify.

4. Click the Goals view tab.
5. Add one or more new records to the Goals list, and complete the necessary fields in each record. Some fields are described in the following table.

Field	Description
Metric	Type of measure, such as currency or units, that the goal or assumption pertains to
Number Format	If the metric is a numeric one, format in which the number is displayed
Target Amount	If the metric is a currency one, money amount that the goal or assumption targets
Target Qty	If the metric is a numeric one, numeric quantity that the goal or assumption targets
Forecast Amount	If the metric is a currency one, money amount predicted for the goal or assumption
Forecast Qty	If the metric is a numeric one, numeric quantity predicted for the goal or assumption

Creating Assumptions for a Loyalty Promotion Goal

The following procedure describes how to create assumptions for a loyalty promotion goal.

To create assumptions for a loyalty promotion goal

1. Navigate to the Loyalty Promotions Administration screen.
2. In the Promotions list, find the promotion to which you want to add assumptions and click the hyperlink in its Promotion Number (#) field.
3. If the promotion form's Active check box is selected, then click Modify.
4. Click the Goals view tab.
5. In the Goals list, select the goal to which you want to add assumptions.
6. Add one or more new records to the Assumptions list, which appears after the Goals list, and complete the necessary fields in each record. Some fields are described in *Creating Goals for a Loyalty Promotion*.

Adding Expenses and Line Items to Loyalty Promotions

You can add expected or incurred expenses to a promotion. For each expense record, you can add one or more line items.

Adding Expenses to a Loyalty Promotion

The following procedure describes how to add expenses to a loyalty promotion.

To add expenses to a loyalty promotion

1. Navigate to the Loyalty Promotions Administration screen.

2. In the Promotions list, find the promotion to which you want to add expenses and click the hyperlink in its Promotion Number (#) field.
3. If the promotion form's Active check box is selected, then click Modify.
4. Click the Expenses view tab.
5. Add one or more new records to the Expenses list, and complete the necessary fields in each record. Some fields are described in the following table.

Field	Description
Expense	Brief title or description of the expense
Purpose	Description or code for the purpose of the expense
Assigned Budget	Amount budgeted for the expense
Variance	Calculated value representing the difference between Forecast Expense and Actual Expense
Unit	Indicates whether the expense is Fixed or Per Unit

Adding Line items to a Loyalty Promotion Expense

The following procedure describes how to add line items to a loyalty promotion expense.

To add line items to a loyalty promotion expense

1. Navigate to the Loyalty Promotions Administration screen.
2. In the Promotions list, find the promotion to which you want to add line items and click the hyperlink in its Promotion Number (#) field.
3. If the promotion form's Active check box is selected, then click Modify.
4. Click the Expenses view tab.
5. In the Expenses list, select the expense to which you want to add line items.
6. Add one or more new records to the Invoice Line Items list, which appears after the Expenses list, and complete the necessary fields in each record. Some fields are described in the following table.

Field	Description
Type	Code or description for the type of expenditure detailed in the line item
Reference	Description of the specific expenditure detailed in the line item
Agreement Line Item	Agreement or contract line item associated with this expense line item
Project Role	Role in the company or team of the person responsible for this expense line item

Field	Description

Adding Purchase Requests to Loyalty Promotions

You can add purchase requests for expected or incurred expenses to a promotion.

To add purchase requests to a loyalty promotion

1. Navigate to the Loyalty Promotions Administration screen.
2. In the Promotions list, find the promotion to which you want to add purchase requests and click the hyperlink in its Promotion Number (#) field.
3. If the promotion form's Active check box is selected, then click Modify.
4. Click the Purchase Requests view tab.
5. Add one or more new records to the list, and complete the necessary fields in each record.
6. If you want to add information such as line items, payments, and approvals, then do the following:
    a. Click the hyperlink in the Purchase Request Number (#) field to display the purchase request in the Service Order form.
    b. Click the appropriate view tab on the Service Order form and add a record to the list.

For detailed information about how to complete a purchase request (which your Siebel application handles as an order), see *Siebel Order Management Guide* .

Adding Market Development Fund Requests to Loyalty Promotions

You can add Market Development Fund (MDF) requests for expected or incurred expenses to a promotion. For more information about MDF requests, see *Siebel Marketing User Guide* .

To add MDF requests to a loyalty promotion

1. Navigate to the Loyalty Promotions Administration screen.
2. In the Promotions list, find the promotion to which you want to add MDF requests and click the hyperlink in its Promotion Number (#) field.
3. If the promotion form's Active check box is selected, then click Modify.
4. Click the MDF Requests view tab.
5. Add one or more new records to the list, and complete the necessary fields in each record. Some fields are described in the following table.

Field	Description
Fund	MDF from which to draw the requested amount.

Field	Description
Partner	Partner that receives a benefit from the MDF disbursement.
Due	Date by which the funds are needed.
Created	Current date as of when the fund request was created. Automatically populated by Siebel Loyalty.

Associating Loyalty Members with Marketing Campaigns

To target members with an outbound communication, you can use marketing campaigns.

Marketing campaigns are based on contacts, not on members. Therefore, you must associate a Member with a Campaign record to include the member in a marketing campaign.

To associate a member with a marketing campaign

1. Navigate to the Loyalty Members screen.
2. In the Loyalty Members list, click the Member Number (#) field of the member you want to associate with the campaign.
3. In the Campaigns list, add a new record, and select the marketing campaign in the Campaign field.

Integrating Promotions with External Target Lists

You can use Oracle's Siebel Marketing to integrate your existing loyalty promotions with external target lists. This integration enables users to run a promotion for a specific list of members. The list can be generated using marketing segmentation and then can be used to enroll or make members eligible for a specific promotion in Loyalty.

In Oracle's Siebel Marketing, use the Campaign Management and the Design views to add related events to a campaign. You can also create enrollment and eligibility buttons for a specific loyalty promotion in an existing campaign. For more information regarding Campaign Management, see the Siebel Marketing User Guide.

Process of Approving Loyalty Promotions

Optionally, an employee can submit a promotion to a manager for approval before activating the promotion.

After loyalty administrators submit promotions to their managers for approval, managers can view and approve them, and loyalty administrators can display the audit trail for those approvals.

To approve loyalty promotions, perform the following tasks:

1. *Displaying Promotions in a Calendar Format*

2. *Submitting Promotions for Approval*
3. *Approving or Rejecting Promotions*
4. *Viewing the Approvals for a Promotion*

Displaying Promotions in a Calendar Format

To help decide which promotions to submit for approval, loyalty administrators can view promotions in a calendar format for a graphic view of what time periods are covered by which promotions. Viewing time periods enables administrators to avoid both overwhelming members with promotions, and neglecting to provide members with any promotions during some periods.

This task is a step in *Process of Approving Loyalty Promotions*.

To display promotions in a calendar format

1. Navigate to the Loyalty Promotions Administration screen.
2. In the show drop-down list, select one of the Promotions - Gantt Chart options.
   Siebel Loyalty displays a calendar view with each promotion listed, with a colored bar showing the time period it covers.
3. If you want to see details of a promotion, then click the hyperlink in its Name field.

Submitting Promotions for Approval

After developing promotions, loyalty administrators submit promotions for management approval.

This task is a step in *Process of Approving Loyalty Promotions*.

To submit a promotion for approval

1. Navigate to the Loyalty Promotions Administration screen.
2. In the Promotions list, find the promotion that you want to submit for approval.
3. If the promotion form's Active check box is selected, then click Modify.
4. In the promotion form, click the Show More button to display the Approval Status field.
5. In the Approval Status field, change the value from In Progress to Submitted.
   Siebel Loyalty sends this promotion to the manager's approvals queue.

Approving or Rejecting Promotions

After loyalty administrators submit promotions, loyalty managers view the promotions and consider them for approval.

This task is a step in *Process of Approving Loyalty Promotions*.

To approve or reject a promotion

1. Navigate to the Home Page.
2. In My Approval Inbox, identify a promotion that you want to consider for approval, and click the hyperlink in its Name field.
3. In the promotion form, click the Show More button to display the Approval Status field.

4. In the promotion's Approval Status field, change the value to Approved or Rejected - Manager, as appropriate.
5. In the Pick Employee pop-up box, do the following:
   a. Select the employee to whom to send a notice of approval or rejection.
   b. In the Comments field, enter an explanation of or expansion on your decision.
   c. Click Send.

Viewing the Approvals for a Promotion

Loyalty administrators can view an approvals audit trail for each promotion to learn its history of approvals or rejections.

This task is a step in *Process of Approving Loyalty Promotions*.

To view the approvals for a promotion

1. Navigate to the Loyalty Promotions Administration screen.
2. Identify the promotion whose approvals audit trail you want to view and click the hyperlink in its Promotion Number (#) field.
3. Click the Approvals view tab.

   The Approvals list shows a record for each approval or rejection, including the manager who made the decision, when, and a comment or explanation.

Activating, Modifying, and Deactivating Loyalty Promotions

You control whether a promotion applies to transactions by Activating or Deactivating it. A promotion only applies to a transaction if the transaction's transaction Date is with the promotion's start and end date period, and the promotion is active.

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

- *Activating Loyalty Promotions*
- *Modifying Loyalty Promotions*
- *Deactivating Loyalty Promotions*

Activating Loyalty Promotions

After you have finished creating a loyalty Promotion, you must click the Activate button to activate it. Clicking Activate:

- Makes all fields on the promotion and all information about the promotion read-only
- Makes the promotion apply to transactions
- Makes the promotion visible to members on the eLoyalty Member Portal

To activate a promotion

1. Navigate to the Loyalty Promotions Administration screen.
2. In the promotions list, select the Promotion you want to activate.
3. Click Activate.

Modifying Loyalty Promotions

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

After you click Modify, the promotion appears to be inactive and its fields and information become read-write again. The original promotion continues to apply to members' transaction until the promotion is activated again.

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 enables you to make changes to a promotion that has already been activated without any down time when the promotion does not apply.

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*.
5. Click Activate.

Deactivating Loyalty Promotions

You can deactivate a promotion so it is no longer available to users. When you deactivate a promotion, the promotion cannot generate extra rewards for members, and it is not 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*.

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.

Allowing Existing Member Fields to Be Used in Loyalty Promotion Criteria

You can set up Siebel Loyalty to allow you to use any field in the Member screen, More Info form in a criterion for a loyalty promotion. For example, this would let you create promotions that only apply to members with two or more children.

If you have configured transaction fields, as described in *Allowing Additional Fields to Control Loyalty Points Given*, then you can also use the method in this topic to use transaction fields in loyalty promotions.

To allow member fields to be used in loyalty promotion criteria

1. In Siebel Tools:
    a. Find the field in the LOY Member business component.
    b. Check to see whether the field already exists in the LOY Engine business component.
    c. If it is not already there, then add the field to the LOY Engine business component.
2. In the Siebel Business Application:
    a. Navigate to Administration - Data screen, List of Values view.
    b. Query for LOY_ATTRIB_FIELDS_MEMBER.
    c. Create new record for each field you need, and enter the necessary information.

    > **Note:** The Display Value and the Language-Independent Code in the new record must exactly match the field name in the business component.

    d. Save new record.
    e. Click Clear Cache to refresh the cache.

Allowing Added Member Fields to Be Used in Loyalty Promotion Criteria

If you configure Siebel Loyalty to add a new field, for example to the Member or Transaction record, then it is not automatically available for you in the promotion criteria. This topic describes how to add a new field that is available in the promotion criteria.

To add a new field used in a transaction

1. Decide what type of attribute you must use in the criteria. For more information about types of attributes, see *Creating Attributes for Loyalty Programs*.
2. Using Siebel Tools, add the field that the attribute is based on to the appropriate business components, as shown in the following table. For example, if you want to use a Transaction Attribute in the criteria, then add the field to the business component LOY Transaction and LOY Engine Transaction.

Attribute Type	Business Components	List of Values Type
Member Field	LOY Member LOY Engine Member	LOY_ATTRIB_FIELDS_MEMBER
Member Tier	LOY Member Tier LOY Engine Member Tier	LOY_ATTRIB_FIELDS_TIER
Transaction	LOY Transaction LOY Engine Transaction	LOY_ATTRIB_FIELDS_TXN
Point Type	LOY Member/LOY Tier LOY Engine Member/LOY Engine Tier	LOY_ATTRIB_FIELDS_MEM_POINT
Product	LOY Engine Transaction	LOY_ATTRIB_FIELDS_TXN_PRODUCT

3. Using Siebel Loyalty, navigate to the Administration - Data screen, List of Values view and add the appropriate value:
    a. In the Type field, query for the appropriate LOV type for this attribute, as shown in the previous table. For example, if you want to use a Transaction Attribute in the criteria, then query for LOY_ATTRIB_FIELDS_TXN.
    b. Add a new record. In the Type field, add this same LOV type. In the Display Value and Language-Independent Code, add an entry that exactly matches the name of the new field that you added to the business component.
    c. Click the Clear Cache button to refresh the cache.
4. Now you can create an attribute based on this new field, as described in *Creating Attributes for Loyalty Programs*.

Configuring Common Promotions

You can configure the product to create commonly used promotions in the following ways.

- *Creating a Promotion That Applies on the Member's Anniversary*
- *Creating Reward Promotions That Apply to the First Transaction on the Day the Member Enrolls*
- *Loyalty Promotion Examples*

Creating a Promotion That Applies on the Member's Anniversary

You can create a promotion that gives members a bonus on the anniversary of the date they joined the program.

You must begin by creating two new fields that include just the month and day (not the year) of the member's start date and the system date, so you can create a rule that compares these values.

To create a promotion that applies on the member's anniversary

1. In Siebel Tools, configure Siebel Loyalty as follows:
    a. In the business component LOY Member, create a calculated field called *Join Date*, calculated using the function `Left([Start Date],5).`
    b. In the business component LOY Engine Member, create the same calculated field.
    c. In the business component LOY Transaction, create a calculated field called *System Date*, calculated using the function `Left(Today(),5).`
    d. In the business component LOY Engine Transaction, create the same calculated field.
2. In Siebel Tools:
    a. Design a work flow that internally checks the member's Joined date with the system date and creates Queued txn with the needed bonus point when these dates match.
    b. Set up a job (using Workflow Batch Process Manager) component to run this workflow.
3. In Siebel Loyalty:
    a. In the List of Values Administration view, add a new record for LOY_ATTRIB_FIELDS_MEMBER with the value *Join Date*.
    b. In the List of Values Administration view, add a new record for LOV LOY_ATTRIB_FIELDS_TXN with the value *System Date*.
    c. Create a Member Attribute based on the field Join Date.
    d. Create a Transaction Attribute based on the field System Date.
    e. Create a promotion with a rule that:
        - Includes a criterion that compares the attribute for the Join Date and the attribute for the System Date.
        - Includes an action that gives a bonus if this criterion is true (Join Date equals System Date).

For general information about adding new fields that are used in promotion criteria, see *Allowing Added Member Fields to Be Used in Loyalty Promotion Criteria*.

Creating Reward Promotions That Apply to the First Transaction on the Day the Member Enrolls

You can create a promotion that only gives a bonus for the first transaction on the day the member enrolls.

To create a promotion that gives a bonus for the first transaction on the day the member enrolls

1. Configure the product so the Joined Date field in the Member screen, More Info view can be used as a criterion for a promotion.

   The Joined Date field tracks a member's enrollment date. For information about using this field as the basis of a promotion, see *About Changing the Fields Used in Loyalty Attributes*.
2. Create a promotion with a promotion-specific attribute that records whether the member has received the bonus (since the member must only get the bonus once).
3. Give the first rule for this promotion these two criteria:

   a. Transaction Date equals Joined Date.
   b. Member has not yet received the bonus.
4. In addition, give the first rule for this promotion these two actions:

   a. Give the member the bonus.
   b. Update attribute to show the member has received the bonus.

Note: This promotion applies to the first transaction processed for that day, not necessarily the first transaction that occurred. For example, if a customer has two transactions, and the engine processes the later transaction first, then the bonus applies to the later transaction.

Loyalty Promotion Examples

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

- *Example of Creating a Simple Frequency Promotion*
- *Example of Creating a Complex Frequency Promotion*
- *Example of Creating an Action-Based Bonus*
- *Example of Creating a Roundtrip Promotion*
- *Example of Creating a Partner Promotion*
- *Example of Creating a Joint Promotion*
- *Example of Creating a Joint Accrual Promotion*
- *Example of Creating an Order-Level Accrual Promotion*
- *Example of Creating an Accrual Package Promotion*
- *Example of Creating a Reward-Referrals Promotion*
- *Example of Creating a Social Rewards Promotion*
- *Troubleshooting Action-Based Bonuses*

There are also examples of how to create a tier promotion in *About Tier Promotions* .

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, and the member gets the bonus as soon as the required number of flights has been reached.

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 can differ, depending on your business model.

Note: When a simple frequency loyalty promotion is defined, an action must be defined to update the attribute in the attribute rule of the promotion. If this action is not added, then the bonus can be given out repeatedly.

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

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 Number (#) 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	SFO-LAX

Note: If this product does not exist in your database, then you must create it and make it available to Siebel Loyalty. For more information, see *Defining Loyalty Products, Price Lists, and Catalogs*.

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.

This rule is the first rule in the promotion because if a member completes a flight that qualifies the member for the bonus, then the actions must be taken in the following order:

1. Update the number of flights attribute.
2. Evaluate the attribute to see whether the member has completed the required number of flights.
3. If so, give the member the bonus.

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
Field	Number 1
Default	0
Data Type	Number

3. When you have finished creating the attribute, select the Active check box.

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, then 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, then 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 is 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
Field	Text 1
Default	No
Data Type	String

2. When you have finished creating the attribute, select the Active check box.

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's Name field hyperlink.
4. Add a new Criteria record, and complete the necessary fields shown in the following table.

Field	Value
Sequence	1
Name	Partner is Indigo Airways
Type of Comparison	Compare to Values
Object	Transaction
Attribute	Partner
Condition	Equals
Value	Indigo Airways

Note: If desired, you could add additional criteria, such as ticket class.

5. Click the Actions view tab.
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 increments by one the promotion-specific attribute that tracks the member's number of flights every time an applicable flight is completed.

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 criterion 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. In the thread bar, click Promotion:Simple Frequency SFO-LAX Promotion.
2. 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

3. Click the rule's Name field hyperlink.
4. In the Criteria list, add a new Criteria record, and complete the necessary fields in the record, its Detail form, and its Value list, shown in the following table.

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

5. In the Criteria list, add a new Criteria record, and complete the necessary fields in the record, its Detail form, and its 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
Condition	Equals
Value	No

6. Click the Actions view tab.
7. 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

Creating an Action That Resets an Attribute Value

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

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

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 create an action that resets an attribute value

1. To set the attribute tracking whether the member has received the bonus to yes, add a new Action record, and complete the necessary fields in the Action list and Detail form, shown in the following table.

Section	Field	Value
Not applicable	Sequence	3
Not applicable	Name	Set Bonus Given Prom-Spec Att to Yes
Not applicable	Type	Update Attribute
Update this attribute	Object	Promotion
Update this attribute	Attribute	Member Given Simple Freq Bonus
Update this attribute	Action	Set
And/Or this value	Value	Yes

2. To reset the number of flights attribute to zero, add a new Action record, and complete the necessary fields in the Action list and Detail form, shown in the following table.

Section	Field	Value
Not applicable	Sequence	2
Not applicable	Name	Set SFO-LAX PS Att to Zero
Not applicable	Type	Update Attribute

Section	Field	Value
Update this attribute	Object	Promotion
Update this attribute	Attribute	SFO-LAX Simple Freq Promotion Attribute
Update this attribute	Action	Set
And/Or this value	Value	0

Activating the Promotion

Now, you are ready to activate the promotion.

To activate the promotion

1. In the thread bar, click Promotion:Simple Frequency SFO-LAX Promotion.
2. In the Promotion form, click Activate.

   The promotion is 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

Unlike a simple frequency promotion, a complex frequency promotion does not give members a bonus as soon as the complete the required number of actions. Instead it waits until the end of the promotion period to give a bonus, because the bonus that is given varies in a step function based on the total number of applicable purchases.

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 can differ, depending on your business model.

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 is processed at a preset date and the decision to give bonus points is not triggered by a transaction. Thus, it always applies automatically.

The Final Action Date field determines when this promotion is processed. You must 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 processes 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	1/21/2006
Promotion End	4/1/2006
Product Inclusion	Include Products
Final Action	4/10/2006

3. Click the Promotion number. The Promotion form appears.
4. In the Promotion form, click the Show more button.
5. In the Final Action Date field, enter 4/6/2006.

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	DEN-CHI

Field	Value

Note: If this product does not exist in your database, then you must create it and make it available to Siebel Loyalty. For more information, see *Defining Loyalty Products, Price Lists, and Catalogs*.

Creating the Attribute for the Promotion

You must create an attribute that is used by this promotion's rule. This attribute is 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
Field	Number 1
Default	0
Data Type	Number

3. When you have finished creating the attribute, select the Active check box.

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

Field	Value
Apply To	Transactions

3. Click the rule's Name field hyperlink.
4. In the Criteria list, 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	Partner is Indigo Airways
Type of Comparison	Compare to Values
Object	Transaction
Attribute	Partner
Condition	Equals
Value	Indigo Airways

Note: If desired, you can add an additional criterion, such as ticket class.

5. Click the Actions view tab.
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.

Section	Field	Value
Not applicable	Sequence	1
Not applicable	Name	Update Promo-Specific DEN-CHI Attribute
Not applicable	Type	Update Attribute

Section	Field	Value
Update this attribute	Object	Promotion
Update this attribute	Attribute	DEN - CHI Complex Freq Promo Attribute
Update this attribute	Action	Add
And/Or this value	Value	1

Creating Rules That Give the Members Bonuses

You must also create rules that give the members bonuses. One rule is created for each different bonus amount a member could receive. In this example, there are three potential bonuses so there are three 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.

Creating a Rule To Gives Members a 1000-Point Bonus

The following procedure describes how to create a rule to reward members with a 1000-point bonus for taking three flights during the promotion period.

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

1. In the thread bar, click Promotion:Complex Frequency DEN - CHI Promotion.
2. 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 equals 3, Give 1,000 Points
Apply To	Attributes

3. Click the rule name.
4. In the Criteria list, add a new Criteria record, and complete the necessary fields in the record and its detail form, as shown in the following table.

Field	Value
Sequence	1

Field	Value
Name	Number of DEN-CHI Flights equals 3
Type of Comparison	Compare to Values
Object	Promotion
Attribute	DEN - CHI Complex Freq Promo Attribute
Condition	Equals
Value	3

5. Click the Actions view tab.
6. 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

Creating a Rule To Gives Members a 3000-Point Bonus

The following procedure describes how to create a rule to reward members with a 3000-point bonus for taking four or five flights during the promotion period.

To create a rule that gives the members a 3000-point bonus for four or five 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 equals 4 or 5, Give 3,000 Points
Apply To	Attributes

2. Click the rule name.
3. In the Criteria list, add a new Criteria record, and complete the necessary fields in the record and its detail form, as shown in the following table.

Field	Value
Sequence	1
Name	Number of DEN-CHI Flights equals 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. Click the Actions view tab.
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

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

Creating a Rule To Gives Members a 5000-Point Bonus

The following procedure describes how to create a rule to reward members with a 5000-point bonus for taking six or more flights during the promotion period.

To create a rule that gives the members a 5000-point bonus for six 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 Greater Than Or Equal To 6, Give 5,000 Points.
Apply To	Attributes

2. Click the rule name.
3. In the Criteria list, add a new Criteria record, and complete the necessary fields in the record and its detail form, as shown in the following table.

Field	Value
Sequence	1
Name	Number of DEN-CHI Flights Greater Than Or Equal To 6
Type of Comparison	Compare to Values
Object	Promotion

Field	Value
Attribute	DEN - CHI Complex Freq Promo Attribute
Condition	Is Greater Than Or Equal To
Value	6

4. Click the Actions view tab.
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 keeps 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 gives points to members based on the total number of DEN-CHI flights they took during this period.

To activate the promotion

1. In the thread bar, click Promotion:Complex Frequency DEN - CHI Promotion.
2. In the Promotion form, click Activate.

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

Example of Creating an Action-Based Bonus

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

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

This example in this topic shows how to create an action-based bonus that gives 1,000 bonus points when you register as a member in the loyalty program.

> **Note:** The bonus for referring a new member is invoked when the member who gets the referral bonus is specified in the Referred By field at the time when a new member enrolls. If a member is already enrolled and you later go back and enter the referring member in the Referred By field, then the referral bonus is not given.

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

Because this topic is an example, it only describes how to create one action-based bonus, the bonus for registering in the program, which uses the product Registration Bonus. Products for three action-based bonuses are available in the Loyalty seed data:

- **Registration Bonus.** Use this product to create an action-based bonus to reward new members for registering.
- **Referral Bonus.** Use this product to create an action-based bonus to reward members for referring a new member.
- **Web Update Bonus.** Use this product to create action-based bonus to reward members for updating their profile on the Web.

The other two action-based bonuses are created similarly to the action-based registration bonus described in the example.

You do not have to create the products used in these three action-based bonuses, because they are already included in the seed data.

> **Note:** When members receive action-based bonuses, Siebel Loyalty creates transactions that have the status Queued to give the members the bonuses, so they cannot be processed manually but are automatically processed by the server. To configure the product so these transactions can be processed manually, see *Allowing Transactions to Be Processed Both Manuallyand Automatically*.

Creating the Promotion Record

As the first step, you must create a promotion record for the action-based bonus.

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	Bonus
Product Inclusion	Include Products

Specifying the Product for the Promotion

Now, you must associate this promotion with the appropriate action-based bonus product. 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.

Note: In this example, you select the product Registration Bonus to create an action-based bonus for registering. You can also select the product Referral Bonus to create an action-based bonus for referring a new member, and you can create an action-based bonus for updating your profile using the product Web Update Bonus.

To specify the product for this promotion

1. Click the Promotion Number (#) 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	Registration Bonus
Part Number (#)	Registration Bonus

Note: If this product does not exist in your database, then you need to create it and make it available to Siebel Loyalty. For more information, see *Defining Loyalty Products, Price Lists, and Catalogs*.

Creating a Rule for the Action-Based Bonus

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's Name field hyperlink.
4. In the Criteria list, 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 form, complete the necessary fields shown in the following table.

Field	Value
Object	Transaction
Attribute	Product
Condition	Equals

6. In the Values list on the Compare to Values Detail form, 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. Click the Actions view tab.

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 1000 Points
Type	Assign Points
Point Type	Regular
Value	1000

Activating the Promotion

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

To activate the promotion

1. In the thread bar, click Promotion:Enrollment Promotion.
2. In the Promotion form, click Activate.
   The promotion is active during the period between the start date and the end date.
   When a member must receive this bonus, the engine creates a transaction with a status of Queued, which means that it cannot be processed with the Process button but is processed by the Loyalty engine in batch mode. When the engine processes this transaction, the member receives the bonus.

Example of Creating a Roundtrip Promotion

A roundtrip promotion gives the member a bonus after the member completes a round-trip. Its criteria include:

- Airline equals Airline Name
- Departure Airport equals XXX
- Arrival Airport equals YYY
- Enrollment equals might or might not be required
- Flight Date equals Between Date 1 and 2
- Roundtrip equals Completed

Its action could be either one of the following:

- Give a flat bonus
- Give a percentage bonus (a percentage based on the 2nd flight)

This promotion uses two user properties, which Siebel Loyalty uses to evaluate each flight and decides whether it is part of a roundtrip or two separate one-way flights:

- Roundtrip Connection Gap (in Hours)
- Roundtrip Stay Gap (in Days)

This example assumes that you have already created the loyalty program, including the flight products used by that program. It gives a bonus for a roundtrip between San Francisco and Denver.

Creating the Promotion Record

As the first step, you must create a promotion record for the roundtrip bonus.

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	Roundtrip SFO-DEN
Apply To	Accrual-Product
Product Inclusion	Include Products

Specifying the Products for the Promotion

Now, you must associate this promotion with the products representing both parts of the roundtrip, the flight from Denver to San Francisco and the flight from San Francisco to Denver.

To specify the product for this promotion

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

Field	Value
Name	DEN-SFO
Part Number (#)	Loyalty Flights

4. Add another new record, and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Name	SFO-DEN
Part Number (#)	Loyalty Flights

Note: If these products do not exist in your database, then you need to create them and make them available to Siebel Loyalty. For more information, see *Defining Loyalty Products, Price Lists, and Catalogs*.

Creating the Promotion-Specific Attribute

Create a promotion-specific attribute to track when the round-trip is completed.

To create the promotion-specific attribute

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	Roundtrip SFO-DEN Attribute
Active	Y
Field	Text 1
Data Type	String

Creating a Rule to Give the Member a Bonus

Create the first rule, which gives the member a bonus when a round-trip is completed.

The key criterion for this rule evaluates the Roundtrip SFO-DEN Attribute to see whether a round-trip has been completed. This evaluates to true if the flight is the second half of a round-trip.

The action for this rule gives the member a bonus if a round-trip has been completed.

Note: In addition to this key criterion, you must also create other criteria that apply in addition to this being the correct flight product, such as using the required airline or the required booking class.

To create a rule that gives members a bonus when they complete the roundtrip

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	Give 3000 Reg NQ bonus when complete roundtrip
Apply To	Transactions

3. Click the rule's Name field hyperlink.
4. In the Criteria list, add a new record, and complete the necessary fields shown in the following table.

Field	Value
Sequence	1
Name	Evaluate Roundtrip
Type of Comparison	Evaluate Roundtrip

5. In the Evaluate Roundtrip Detail form, complete the necessary fields shown in the following table.

Field	Value
Compare Transaction Roundtrip Info: Object	Transaction
Compare Transaction Roundtrip Info: Attribute	Roundtrip Attribute
To Recorded Roundtrip Info: Object	Transaction

Field	Value
To Recorded Roundtrip Info: Attribute	Roundtrip SFO-DEN Attribute

6. In the Values list on the Compare to Values Detail form, add a new record and select the product used in this promotion, as shown in the following table.

Field	Value
Value	SFO-DEN

7. Click the Actions view tab.
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 3000 Regular NQ Points
Type	Assign Points
Point Type	Regular
Value	3000

Creating a Rule to Update the Roundtrip Attribute

Create the first rule, which updates the promotion-specific roundtrip attribute. This rule applies if this trip is the first half of a possible round-trip.

The criterion is any requirement that applies in addition to using the correct flight product, such as using the required airline or the required booking class. In this example, the criterion checks for the required airline.

The action is to update the promotion-specific attribute to show that half of a round-trip has been completed.

This attribute stores the information that is evaluated by the two user properties to see whether the next potentially applicable flight completes the round-trip.

To create a rule that updates the roundtrip 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	2
Name	Update SFO-DEN Roundtrip Attribute
Apply To	Transactions

3. Click the rule's Name field hyperlink.
4. In the Criteria list, add a new record, and complete the necessary fields shown in the following table.

Field	Value
Sequence	1
Name	Partner-Indigo Airways
Type of Comparison	Compare to Values

5. In the Evaluate Roundtrip Detail form, complete the necessary fields shown in the following table.

Field	Value
Object	Transaction
Attribute	Partner
Condition	Equals

6. In the Values list on the Compare to Values Detail form, add a new record and select the product used in this promotion, as shown in the following table.

Field	Value
Value	Indigo Airways

Field	Value

7. Click the Actions view tab.
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	Update Roundtrip attribute
Type	Update Roundtrip information
Update this roundtrip attribute: Object	Promotion
Update this roundtrip attribute: Attribute	Roundtrip SFO-DEN Attribute
With this transaction attribute: Object	Transaction
With this transaction attribute: Attribute	Roundtrip Attribute

Activating the Promotion

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

To activate the promotion

1. In the Promotions list, select the record for this promotion.
2. Click Activate.

   The promotion is active during the period between the start date and the end date, and members receive 3000 bonus points for completing the SFO-DEN round-trip.

Example of Creating a Partner Promotion

A partner promotion gives a member a bonus when the member purchases a product from a partner.

The partner's product could be a flight, hotel stay, car rental, credit card purchase, or any other product that a partner sells.

A partner promotion is just like the promotions shown in other examples, except that you select the partner's name in the Partner field. Apart from that, you can use the same rules, attributes, criteria, and actions as the other examples.

When a member purchases the product, the member receives a bonus, and the points are deducted from the partner's point block.

To create a promotion as a partner promotion

1. Navigate to the Loyalty Promotions Administration screen.
2. Add a new Promotion record, and complete the necessary fields. In the Partner field, select the name of the partner company.

For more information about how to set up partners and work with partners, see *Using Siebel Loyalty with Partners*

Example of Creating a Joint Promotion

A joint promotion gives a member a bonus when the member purchase products from two companies. The purchases could be from the host company and a partner company or from two partner companies.

In the example, the member receives 5000 bonus points for making the following purchases from the host company (Indigo Airways) and a partner:

- Fly Indigo Airways from DEN to SFO two times
- Rent a car for three days from Speedy Car Rentals

This example assumes that you have already created the loyalty program, including the products used by the program.

Creating the Promotion Record

As the first step, you must create a promotion record for the joint 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	Joint Indigo and Speedy Promotion
Apply To	Accrual-Product

Field	Value
Product Inclusion	Include Products

Specifying the Products for the Promotion

Now, you must associate this promotion with applicable the products from both companies.

To specify the products for this promotion

1. Click the Promotion Number (#) 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	DEN-SFO
Part Number (#)	Loyalty - Flights

4. Add another new Product record, and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Name	One Day Car Rental - Compact
Part Number (#)	Loyalty - Car Rental

5. Add more product records for every applicable car rental product, for example, for One Day Car Rental - Standard and One Day Car Rental - Luxury.

Note: If these products do not exist in your database, then you need to create them and make them available to Siebel Loyalty. For more information, see *Defining Loyalty Products, Price Lists, and Catalogs*.

Creating Promotion-Specific Attributes

Create two promotion-specific attributes, where one attribute tracks the purchases from each company.

To create the promotion-specific attributes

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

Field	Value
Name	Number of DEN-SFO Flights
Active	Y
Field	Number 1
Data Type	Number

3. Add another new record, and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Name	Number of Speedy Car Rentals
Active	Y
Field	Number 2
Data Type	Number

Creating Rules to Update the Promotion-Specific Attributes

You must create rules to update both of these promotion-specific attribute when a member makes the applicable purchases.

To create rules that update the promotion-specific attributes

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	2
Name	Update Number of DEN-SFO promo-spec attribute
Apply To	Transactions

Field	Value

3. Click the rule's Name field hyperlink.
4. In the Criteria list, add a new record, and complete the necessary fields shown in the following table.

Field	Value
Sequence	1
Name	Partner is Indigo Airways
Type of Comparison	Compare to Values

5. In the Compare to Values Detail form, enter the values shown in the following table.

Field	Value
Object	Transaction
Attribute	Partner
Condition	Equals

6. In the Values list on the Compare to Values Detail form, add a new record and enter the value shown in the following table.

Field	Value
Value	Indigo Airways

7. Click the Actions view tab.
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	Update Number of DEN-SFO flights promo-spec attribute

Field	Value
Type	Update Attribute
Update this attribute: Object	Promotion
Update this attribute: Attribute	Number of DEN-SFO Flights
Action	Add
Value	1

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

Field	Value
Sequence	2
Name	Update Number of Speedy Rentals promo-spec attribute
Apply To	Transactions

10. Click the rule's Name field hyperlink.
11. In the Criteria list, add a new record, and complete the necessary fields shown in the following table.

Field	Value
Sequence	1
Name	Partner is Speedy Car Rental
Type of Comparison	Compare to Values

12. In the Compare to Values Detail form, enter the values shown in the following table.

Field	Value
Object	Transaction
Attribute	Partner
Condition	Equals

13. In the Values list on the Compare to Values Detail form, add a new record and select the product used in this promotion, as shown in the following table.

Field	Value
Value	Speedy Car Rentals

14. Click the Actions view tab.
15. 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 Number of Speedy Car Rentals promo-spec attribute
Type	Update Attribute
Update this attribute: Object	Promotion
Update this attribute: Attribute	Number of Speedy Car Rentals
Action	Add
Value	1

Creating a Rule to Give the Member a Bonus

Next, you must create a rule that gives the member the bonus when the member has completed the required number of purchases from both companies.

The requirement for this rule is that both the member's promotion-specific attributes are equal to or greater than the required amounts. Use Greater Than rather than Equal To, because it might have more than the required value for one attribute before reaching the required value for the other.

To create a rule that gives members a bonus

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	Fly 2 Times, rent 3 days, get 5,000 Reg NQ points
Apply To	Attributes

3. Click the rule's Name field hyperlink.
4. In the Criteria list, add a new record, and complete the necessary fields shown in the following table.

Field	Value
Sequence	2
Name	Number of Speedy car rental days greater than or equal to 3
Type of Comparison	Compare to Values

5. In the Compare to Values Detail form, complete the necessary fields shown in the following table.

Field	Value
Object	Promotion
Attribute	Number of Speedy Car Rentals
Condition	Is Greater Than

6. In the Values list on the Compare to Values Detail form, add a new record and select the product that you created for this promotion, as shown in the following table.

Field	Value
Value	2

7. In the Criteria list, add another new record, and complete the necessary fields shown in the following table.

Field	Value
Sequence	1
Name	Number of DEN-SFO flights greater than or equal to 2
Type of Comparison	Compare to Values

8. In the Compare to Values Detail form, complete the necessary fields shown in the following table.

Field	Value
Object	Promotion
Attribute	Number of DEN-SFO Flights
Condition	Is Greater Than

9. In the Values list on the Compare to Values Detail form, add a new record and select the product that you created for this promotion, as shown in the following table.

Field	Value
Value	1

10. Click the Actions view tab.
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	1

Field	Value
Name	Give 5,000 Reg NQ points
Type	Assign Points
Point Type	Regular
Value	5000

Activating the Promotion

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

To activate the promotion

1. In the Promotions list, select this promotion.
2. Click Activate.

   The promotion is active during the period between the start date and the end date. Members receive the bonus points for making the required purchases.

Example of Creating a Joint Accrual Promotion

A joint accrual promotion gives a member and corporate partners points for joint accruals. In a joint accrual promotion, the points are calculated using the distance table and base promotion or from product points. The points to be given to the individual member or corporate member are calculated using the Admin - Accrual promotion. The rules given (described in the following subtopics) must also be part of the Admin - Accrual promotion.

For example, you might have two companies where one company needs to be given 50% of the distance flow to the corporate account and 50% to the individual member and the other company needs to accrue 40% to the corporate account and 60% to the individual. It is recommended that you take into account the corporate reference number while defining the rules for this promotion.

This example assumes that you have already created the loyalty program, including the products used by the program.

Creating the Promotion Record

As the first step, you must create a promotion record for the joint 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	Joint - Accrual
Apply To	Accrual-Product
Product Inclusion	Include Products

Creating Rules to Reward Individual and Corporate Members

If the accrual type for an account is both, then by default the corporate member gets the same number of points as the individual member.

However, if the corporate member needs to be rewarded in a different point type, or with a different number of points, then a separate promotion is required. The transaction for the individual member contains the corporate member number in the Corporate Member Reference field, and the individual member must have the same corporate member number mentioned in that individual member setup.

To create rules to reward individual and corporate members

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	2
Name	Reward Corporate Member
Apply To	Transactions

3. Click the rule's Name field hyperlink.
4. In the Criteria list, add a new record, and complete the necessary fields shown in the following table.

Field	Value
Sequence	1
Name	Enter the Name
Type of Comparison	Compare to Values

Field	Value

5. In the Compare to Values Detail form, enter the values shown in the following table.

Field	Value
Object	Member
Attribute	Member Type
Condition	Equals

6. In the Values list on the Compare to Values Detail form, add a new record and enter the value shown in the following table.

Field	Value
Value	Account

7. Click the Actions view tab.
8. Add a new Action record, and complete the necessary fields in the Action list and Detail form, shown in the following table. The action can be configured to give a different point percentage.

Field	Value
Sequence	1
Name	Assign Points
Type	Assign Points
Point Type	Use from Transaction
Object	Transaction
Attribute	Transaction Points

Activating the Promotion

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

To activate the promotion

1. In the Promotions list, select this promotion.
2. Click Activate.

   The promotion is active during the period between the start date and the end date. Members receive the bonus points for making the required purchases.

Example of Creating an Order-Level Accrual Promotion

An *order-level* accrual promotion gives a member points depending on the number of successfully processed transactions from an order. In this example, the member receives 500 points with the purchase of two pairs of jeans and three shirts in one order. It assumes that you have already created the loyalty program, including the products used by the program.

Creating the Promotion Record

As the first step, you must create a promotion record for the joint 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	Order Level - Accrual
Order Flag	Yes
Apply To	Accrual-Product
Product Inclusion	Include Products

Creating Promotion-Specific Attributes

Create two promotion-specific attributes, where one attribute tracks the number of jeans and shirts purchased.

To create the promotion-specific attributes

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	Number of Jeans
Active	Y
Field	Number 1
Data Type	Number

3. Add another new record, and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Name	Number of Shirts
Active	Y
Field	Number 2
Data Type	Number

Creating Rules to Check the Number of Jeans and Shirts Purchased

You must create rules to update both of these promotion-specific attributes when a member makes the applicable purchases.

To create rules to check the number of jeans and shirts purchased

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	Check Jeans Purchased

Field	Value
Apply To	Transactions

3. Click the rule's Name field hyperlink.
4. In the Criteria list, add a new record, and complete the necessary fields shown in the following table.

Field	Value
Sequence	1
Name	Enter the Name
Type of Comparison	Compare to Values

5. In the Compare to Values Detail form, enter the values shown in the following table.

Field	Value
Object	Transaction
Attribute	Product Name
Condition	Equals

6. In the Values list on the Compare to Values Detail form, add a new record and select the Jeans product.
7. Click the Actions view tab.
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	Update Number of Jeans Purchased
Type	Update Attribute
Update this attribute:	Promotion

Field	Value
Object	
Update this attribute: Attribute	Number of Jeans
Update this attribute: Action	Add
With this attribute: Object	Transaction
With this attribute: Attribute	Order Quantity

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

Field	Value
Sequence	2
Name	Check Shirts Purchased
Apply To	Transactions

10. Click the rule's Name field hyperlink.
11. In the Criteria list, add a new record, and complete the necessary fields shown in the following table.

Field	Value
Sequence	1
Name	Enter the Name
Type of Comparison	Compare to Values

12. In the Compare to Values Detail form, enter the values shown in the following table.

Field	Value
Object	Transaction
Attribute	Product Name
Condition	Equals

13. In the Values list on the Compare to Values Detail form, add a new record and select the Shirts product.
14. Click the Actions view tab.
15. 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 Number of Shirts Purchased
Type	Update Attribute
Update this attribute: Object	Promotion
Update this attribute: Attribute	Number of Shirts
Update this attribute: Action	Add
With this attribute: Object	Transaction
With this attribute: Attribute	Order Quantity

Field	Value

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

Field	Value
Sequence	3
Name	Apply Bonus for the Purchase
Apply To	Attribute

17. Click the rule's Name field hyperlink.
18. In the Criteria list, add a new record, and complete the necessary fields shown in the following table.

Field	Value
Sequence	1
Name	Enter the Name
Type of Comparison	Compare to Values

19. In the Compare to Values Detail form, enter the values shown in the following table.

Field	Value
Object	Promotion
Attribute	Number of jeans
Condition	Is Greater Than

20. In the Values list on the Compare to Values Detail form, add a new record and enter the value shown in the following table.

Field	Value
Value	2

21. In the Criteria list, add a new record, and complete the necessary fields shown in the following table.

Field	Value
Sequence	2
Name	Enter the Name
Type of Comparison	Compare to Values

22. In the Compare to Values Detail form, enter the values shown in the following table.

Field	Value
Object	Promotion
Attribute	Number of shirts
Condition	Is Greater Than

23. In the Values list on the Compare to Values Detail form, add a new record and enter the value shown in the following table.

Field	Value
Value	3

24. Click the Actions view tab.
25. 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

Field	Value
Name	Assign Points
Type	Assign Points
Point Type	Use from Transaction
Object	Transaction
Value	500

Activating the Promotion

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

To activate the promotion

1. In the Promotions list, select this promotion.
2. Click Activate.
   The promotion is active during the period between the start date and the end date. Members receive the bonus points for making the required purchases.

Example of Creating an Accrual Package Promotion

An accrual package promotion is similar to a joint promotion, in that a member earns a bonus for making purchases from multiple partners, but has the additional ability to split debit points for the bonus among all the partners involved in the promotion, in a specified ratio. For example, within a specific period, a member must do the following to receive 5000 bonus points:

- Fly Indigo Airways three times AND
- Stay in Top hotels twice AND
- Rent a Speedy car three times

The points are debited to the partners Indigo, Top and Speedy in the ratio 2:1:1. To achieve the points split, you associate multiple partners at the accrual package promotion level, rather than associating a single partner at the promotion level.

This example assumes that you have already created the loyalty program and products necessary for the promotion.

Creating a Promotion Record for an Accrual Package Promotion

The first step is to create the promotion record and specify the partners.

To create a promotion record for an accrual package promotion

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	Accrual Package Split Promotion
Always Apply	No
Apply To	Accrual-Product
Promotion Start	1/15/2008
Promotion End	7/15/2008
Product Inclusion	Include Products
Accrual Package Flag	Select this check box
Partner	Leave this field blank. You enter the partner names in *Creating a Promotion Record for an Accrual Package Promotion*.

3. Click the Promotion number.

   The Promotion form appears.
4. In the Promotion form, click the Package Accrual Split view tab.
5. To split the debit among the three partners in the ratio 2:1:1, add three new records, as shown in the following table.

Record	Partner Name	Percentage Split
1	Indigo	50
2	Top	25
3	Speedy	25

Creating Attributes for the Promotion

The next step is to create one attribute each for the three partners associated with the promotion.

To create the attributes for an accrual package promotion

1. In the Promotion form, 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	Indigo flight
Active	Y
Field	Number 1
Default	0
Data Type	Number

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

Field	Value
Name	Top hotel
Active	Y
Field	Number 2
Default	0
Data Type	Number

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

Field	Value
Name	Speedy car rental
Active	Y

Field	Value
Field	Number 3
Default	0
Data Type	Number

Creating Rules to Update Accrual Package Promotion Attributes

The next step is to create rules to update the accrual package promotion attributes when a member makes a purchase from the partners.

To create rules to update accrual package promotion attributes

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

Field	Value
Sequence Number (#)	2
Name	Update number of Indigo flights
Apply To	Transactions

3. Click the rule's Name field hyperlink.
4. In the Criteria list, add a new record, and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Sequence Number (#)	1
Name	Update number of Indigo flights
Type of Comparison	Compare to Values

5. In the Compare to Values Detail form, enter the values shown in the following table.

Field	Value
Object Number (#)	Transaction
Attribute	Partner
Condition	Equals

6. In the Values list on the Compare to Values Detail form, add a new record and select the partner to use for this promotion, as shown in the following table.

Field	Value
Value	Indigo

7. Click the Actions view tab.
8. In the Actions list, add a new record, and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Sequence Number (#)	1
Name	Update number of Indigo flights
Type	Update Attribute
Object	Promotion
Attribute	Select the Indigo flight promotion
Action	Add
Value	1

9. Repeat ste[1 through step 8 to add rules for Speedy rental and again for Top hotels.

Creating a Rule to Give a Bonus

The next step is to create a rule to give the member a bonus when the member has completed the required flights, hotel stays and car rentals.

The requirement for this rule is that all of the member's promotion-specific attributes are equal to or greater than the required amounts. Use Greater Than rather than Equal To, because the member might have more than the required value for one attribute before reaching the required value for the other.

To create a rule that gives members a bonus

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	Indigo 3 flights, Top 2 stays, Speedy 3 rentals, get 5,000 Reg NQ points
Apply To	Attributes

3. Click the rule's Name field hyperlink.
4. In the Criteria list, add a new record, and complete the necessary fields shown in the following table.

Field	Value
Sequence	1
Name	Count of Indigo flights greater than or 3
Type of Comparison	Compare to Values

5. In the Compare to Values Detail form, complete the necessary fields shown in the following table.

Field	Value
Object	Promotion
Attribute	Select the Indigo promotion
Condition	Is Greater Than

6. In the Values list on the Compare to Values Detail form, add a new record and select the product that you created for this promotion, as shown in the following table.

Field	Value
Value	2

7. In the Criteria list, add another new record, and complete the necessary fields shown in the following table.

Field	Value
Sequence	2
Name	Count of Top hotel stays greater than or equal to 2
Type of Comparison	Compare to Values

8. In the Compare to Values Detail form, complete the necessary fields shown in the following table.

Field	Value
Object	Promotion
Attribute	Select the Top promotion
Condition	Is Greater Than

9. In the Values list on the Compare to Values Detail form, add a new record and select the product that you created for this promotion, as shown in the following table.

Field	Value
Value	1

10. In the Criteria list, add another new record, and complete the necessary fields shown in the following table.

Field	Value
Sequence	3

Field	Value
Name	Count of Speedy rentals greater than or equal to 3
Type of Comparison	Compare to Values

11. In the Compare to Values Detail form, complete the necessary fields shown in the following table.

Field	Value
Object	Promotion
Attribute	Select the Speedy promotion
Condition	Is Greater Than

12. In the Values list on the Compare to Values Detail form, add a new record and select the product that you created for this promotion, as shown in the following table.

Field	Value
Value	2

13. Click the Actions view tab.
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	4
Name	Give 5,000 Reg NQ points
Type	Assign Points
Point Type	Regular
Value	5000

Activating the Promotion

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

To activate the promotion

1. In the Promotions list, select this promotion.
2. Click Activate.

   The promotion is active during the period between the start date and the end date. Members receive the bonus points for making the required purchases.

Example of Creating a Reward-Referrals Promotion

A reward-referrals promotion rewards members for referring other individuals to a loyalty promotion on a social network. The member who receives the referral reward must be specified in the Referred By Member Number field at the time when the new member enrolls.

The reward referrals promotion implements the Reward Referrer action. When implemented in a promotion, the Reward Referrer action causes the Loyalty Engine to create a new transaction by copying the original enroll-member transaction. In the newly-created accrual transaction, the primary member number of the transaction is replaced with the referral member number. The transaction is then processed by the Loyalty Engine to reward the referrer.

The example promotion in this topic shows how to create a promotion that uses the Enroll to Promotion action and the Reward Referrer action to perform the following tasks:

- Enroll a member into a promotion, and assign a bonus to the member for enrolling
- Assign a referral bonus to the referrer if a referral member ID is included in the initial enroll transaction

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

Creating the Promotion Record

As the first step, you must create a promotion record for the reward referrals 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	Reward Referrals
Always Apply	Yes
Apply To	Promotion Enrollment
Product Inclusion	All Products

Field	Value

Specifying the Product for the Promotion

Now, you must associate this promotion with the promotion enrollment product.

To specify the product for this promotion

1. Click the Promotion Number (#) 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	Promotion Enrollment
Part Number (#)	Loyalty - Member Services

Creating the Attribute to Record if a Referral Member Number Exists

Create a transaction attribute to record whether or not a referral member number exists in the record of the person being enrolled.

To create the attribute that records whether or not a referral member number exists

1. On the Loyalty Program Administration screen, click the Program Level Attributes tab, then the Transaction Attributes view tab.
2. Add a new record, and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Name	Referred By Member Number
Active	Yes
Field	Referred By Member Number
Read Only	Yes
Data Type	String

Creating Rules to Reward Members for Referrals

Create a rule for this promotion to enroll the new member into the promotion and to reward the referring member if a referral member number is provided.

To create rules that enroll new members and reward referring members

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	Referral member number does not exist
Apply To	Transactions

3. Click the rule's Name field hyperlink.
4. To create the first criterion, add a new record in the Criteria list, and complete the necessary fields as shown in the following table.

Field	Value
Sequence	1
Name	If Referred By Member Number is empty
Type of Comparison	Compare to Object

5. In the Compare to Value Details form, enter the values shown in the following table.

Field	Value
Object	Transaction
Attribute	Select the name of the transaction attribute that you have mapped to the Referred By Member Number field, in this example, Referred By Member Number.
Condition	Is Empty

6. Click the Actions view tab.
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	Enroll to Promotion
Type	Promotion Enrollment

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

Field	Value
Sequence	2
Name	Update IC
Type	Update Attribute

9. In the Update Attribute Action form, enter the values in the following table.

Field	Value
Update this attribute: Object	Member
Update this attribute: Attribute	Incentive Choice - *promotion_number* where *promotion_number* is the row ID of the promotion for which the Incentive Choice is defined.
Action	Set
With this attribute: Object	Transaction
With this attribute: Attribute	Promotion Incentive Choice

10. Click the Rules view tab.

11. Create the second rule for this promotion by adding a new record to the Rules list and entering the values shown in the following table.

Field	Value
Sequence	2
Name	Referral member number exists
Apply To	Transactions

12. Click the rule's Name field hyperlink.
13. To create the first criterion, add a new record in the Criteria list, and complete the necessary fields as shown in the following table.

Field	Value
Sequence	2
Name	If Referred By Member Number is not empty
Type of Comparison	Compare to Object

14. In the Compare to Value Details form, enter the values shown in the following table.

Field	Value
Object	Transaction
Attribute	Referred By Member Number
Condition	Is Not Empty

15. Click the Actions view tab.
16. 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

Field	Value
Name	Enroll to Promotion
Type	Promotion Enrollment

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

Field	Value
Sequence	2
Name	Update IC
Type	Update Attribute

18. In the Update Attribute Action form, enter the values in the following table.

Field	Value
Update this attribute: Object	Member
Update this attribute: Attribute	Incentive Choice - *promotion_number* where *promotion_number* is the row ID of the promotion for which the Incentive Choice is defined.
Action	Set
With this attribute: Object	Transaction
With this attribute: Attribute	Promotion Incentive Choice

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

Field	Value
Sequence	3
Name	Reward Referrer

Field	Value
Type	Reward Referrer

Activating the Promotion

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

To activate the promotion

1. In the thread bar, click Promotion: Reward Referrals.
2. In the Promotion form, click Activate.

   The promotion is active during the period between the start date and the end date that you chose.

Example of Creating a Social Rewards Promotion

A social rewards promotion is one type of action-based bonus promotion. A social rewards promotion rewards members for actions they perform on social networks, for example, when a member performs Like, Share, or Tweet actions about a product, promotion or brand, they are rewarded 100 social reward points.

When creating promotions that reward customers for social actions, two options are available:

- You can create the actions that are to be rewarded as products, for example you can create a product named Like or Tweet. You can then associate the product to the promotion. In this case, the member is rewarded for all their social actions of a particular type (Likes, or Tweets), regardless of the item the action refers to.
- Alternatively, you can create a promotion that rewards members who Like or Tweet about a specific product. In this case, the promotion can be associated with a specific product, and the action specified for the promotion is Like or Tweet. This is the option implemented in this example.

This example shows how to create a promotion for an airline Loyalty program that rewards members who perform Tweet, Like, or Share actions on social networks for an Early Bird flight product.

The example in this topic assumes that you have already set up a loyalty program, and that the Early Bird flight product exists in your database, and has been made available to Siebel Loyalty. The Early Bird flight product must have a part number that is equal to Social Reward. For more information about defining Loyalty products, see *Defining Loyalty Products, Price Lists, and Catalogs*.

Creating the Promotion Record

As the first step, you must create a promotion record for the social rewards 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	Social Rewards
Always Apply	Yes
Apply To	Accrual - Product

Specifying the Product for the Promotion

Now, you must associate this promotion with the Early Bird product.

To specify the product for this promotion

1. Click the Promotion Number (#) 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	Early Bird
Part Number (#)	Social Reward

Creating the Promotion-Specific Attribute

Create a transaction attribute to track social actions performed by members.

On the Loyalty Program Administration screen, click the Program Level Attributes tab, then the Transaction Attributes view tab.

To create the promotion-specific attribute

1. On the Loyalty Program Administration screen, click the Program Level Attributes tab, then the Transaction Attributes view tab.
2. Add a new record, and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Name	Social Action Type
Active	Y

Field	Value
Field	Social Action Type
Read Only	Yes
Data Type	String
Pick List	LOY Social Action Type Picklist

Creating a Rule for the Social Rewards Promotion

Next, you must create a rule for the social rewards promotion that gives members bonus points when they perform a Like or Tweet action or check-in their location.

To create a rule that gives customers a bonus for social actions

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	Check whether action is Like
Apply To	Transactions

3. Click the rule's Name field hyperlink.
4. In the Criteria list, add a new record, and complete the necessary fields shown in the following table.

Field	Value
Sequence	1
Name	Check Reward Type is Like
Type of Comparison	Compare to Values

5. In the Compare to Values Detail form, click New then complete the necessary fields shown in the following table.

Field	Value
Object	Transaction
Attribute	Social Action Type
Condition	Equals

6. In the Values list on the Compare to Values Detail form, enter the value shown in the following table.

Field	Value
Value	Like

7. Click the Actions view tab.
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	Assign Bonus Points
Type	Assign Points
Point Type	Regular
Value	100

9. Click the Actions view tab.
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	2
Name	Issue Voucher

Field	Value
Type	Assign Voucher
Voucher	500 Miles Domestic Upgrade
Quantity	1

11. Click the Rules view tab.
12. Create a second rule for the promotion in the Rules list, and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Sequence	2
Name	Check whether action is Tweet
Apply to	Transaction

13. Click the rule's Name field hyperlink.
14. In the Criteria list, add a new record, and complete the necessary fields shown in the following table.

Field	Value
Sequence	1
Name	Check Reward Type is Tweet
Type of Comparison	Compare to Values

15. In the Compare to Values Detail form, click New then complete the necessary fields shown in the following table.

Field	Value
Object	Transaction
Attribute	Social Action Type

Field	Value
Condition	Equals

16. In the Values list on the Compare to Values Detail form, add the value shown in the following table.

Field	Value
Value	Tweet

17. Click the Actions view tab.
18. 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	Assign Bonus Points
Type	Assign Points
Point Type	Regular
Value	100

19. Click the Actions view tab.
20. 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	Issue Voucher
Type	Assign Voucher
Voucher	500 Miles Domestic Upgrade

Field	Value
Quantity	1

21. Create a third rule for the promotion in the Rules list, and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Sequence	3
Name	Check whether action is Share
Apply to	Transactions

22. Click the rule's Name field hyperlink.
23. In the Criteria list, add a new record, and complete the necessary fields shown in the following table.

Field	Value
Sequence	1
Name	Check Reward Type is Share
Type of Comparison	Compare to Values

24. In the Compare to Values Detail form, click New then complete the necessary fields shown in the following table.

Field	Value
Object	Transaction
Attribute	Social Action Type
Condition	Equals

25. In the Values list on the Compare to Values Detail form, add the value shown in the following table.

Field	Value
Value	Share

26. Click the Actions view tab.
27. 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	Assign Bonus Points
Type	Assign Points
Point Type	Regular
Value	100

28. Click the Actions view tab.
29. 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	Issue Voucher
Type	Assign Voucher
Voucher	500 Miles Domestic Upgrade
Quantity	1

Activating the Promotion

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

To activate the promotion

1. In the thread bar, click Promotion: Social Rewards.
2. In the Promotion form, click Activate.

   The promotion is active during the period between the start date and the end date you specified.

Troubleshooting Action-Based Bonuses

If an action based bonus does not work properly, then check that the following requirements have been met:

- There must be exactly one product with each of the following Part Numbers
  - Registration Bonus
  - Referral Bonus
  - Web Update Bonus

  The name of the product does not matter, because the engine only evaluates the Product Id.
- These products must be associated with the correct Organization, which is the same Organization as the Program.
- The following Workflows must be Active:
  - LOY ABB New Member Process
  - LOY ABB Web Update Process
  - LOY ABB Web Update Shell Process
  - LOY Action Based Bonus Referral Subprocess
  - LOY Action Based Bonus Subprocess
- The following Run Time Events must exist and be active:

```
BusComp LOY Member - WriteRecordNew - GetProfileAttr("ApplicationName") = "Siebel Loyalty" OR
 GetProfileAttr("ApplicationName") = "Siebel Loyalty Partner Portal" - LOY ABB New Member Record

BusComp LOY Member - WriteRecordUpdated - GetProfileAttr("ApplicationName") = "Siebel Loyalty eMember" - LOY
 ABB Write Member Record eApps
```

Promotions Based on Day or Time of Purchase

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

- Purchases made between 4 PM and 6 PM

- Purchases made on Mondays
- Purchases made during the first week of the year
- The third purchase made in a given week
- The second purchase made in the same day

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

Related Topics

About Calendar Attributes

Creating Calendar Attributes

Creating Promotions Based on Day or Time of Purchase

About Calendar Attributes

You use calendar attributes to keep track of the dates and times of customers' purchases in order to create promotions rewarding frequent customers. For more information, see *Promotions Based on Day or Time of Purchase*.

Calendar attributes must be created at the program level. They can be used by all promotions in the program.

The following table lists the methods that are available when you create calendar attributes and their uses. When you create a calendar attribute, you select one of these methods, which returns the value of the attribute. For more information, see *Creating Calendar Attributes*.

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

Method	Description	Usage	Picklist
First Week of Year	Returns 0 for true or 1 for false to indicate whether the transaction occurred during the first week of the year.	The user just specifies the year in the criterion, and the attribute calculates the first week.	LOY PickList Calendar Boolean Values
Day of Week	Returns an integer representing the number of the day of the week.	If the transaction's Date:Time stamp is 8/2/2009 11:28:39 PM, then the Day of Week method returns 1, because this is a Sunday, the first day of the week.	None. Valid Values: 1 to 7
Day of Month	Returns an integer representing the number of the day of the month.	If the transaction's Date:Time stamp is 8/2/2009 11:28:39 PM, then the Day of Month method returns 2, because this is the second day of the month.	None. Valid Values: 1 to 31
Day of Year	Returns an integer representing the number of the day of the year.	If the transaction's Date:Time stamp is 12/31/2009 01:01:01 AM, then the Day of Year method returns 365, because this is the 365th day of the year.	None. Valid Values: 1 to 366
Week of Year	Returns an integer representing the number of the week of the year.	If the transaction's Date:Time stamp is 1/9/2009 01:01:01 AM, then the Week of Year method returns 2 because this is the second week of the year.	None. Valid Values: 1 to 53
Month of Year	Returns an integer representing the number of the month of the year.	If the transaction's Date:Time stamp is 8/2/2009 11:28:39 PM, then the Month of Year method returns 8.	None. Valid Values: 1 to 12
Hour	Returns an integer representing the hour of the transaction.	If the transaction's Date:Time stamp is 8/2/2009 11:28:39 PM, then the Transaction Hour attribute method returns 23.	None. Valid Values: 0 to 23
Year	Returns an integer representing the number of the year.	If the transaction's Date:Time stamp is 8/2/2009 11:28:39 PM, then the Year method returns 2009.	None
Date	Returns the date from the transaction's Date:Time stamp.	If the transaction's Date:Time stamp is 8/2/2009 11:28:39 PM, then the Date method returns is 8/2/2009.	None

Creating Calendar Attributes

You create calendar attributes at the program level, and they can be used in the criteria of any promotions in that program.

To create calendar attributes

1. Navigate to the Loyalty Program Administration screen.
2. Drill down on the name of the program that you want.

   The Active checkbox for the program must be deselected.
3. Click the Program Level Attributes view tab.
4. Click the Calendar Attributes subtab.
5. In the Calendar Attributes view, add a new record, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Name	Enter a name for the attribute. When you select the attribute in rules, this is the value that you select.
Active	Select this checkbox to activate the attribute, making it available for use in promotions in this program.
Method	Select the method that returns the value of this attribute. For more information, see *About Calendar Attributes*.
Field	Enter any field of the type Date, depending on the business requirement.
Data Type	Displays the data type returned by the method selected in the Method field.
Pick List	Displays the picklist for the method selected, as described in *About Calendar Attributes*.

Creating Promotions Based on Day or Time of Purchase

You create promotions to reward purchases based on the day or time when the purchase was made as you create other promotions, selecting the values described in the following procedure. For more information, see *Process of Creating Loyalty Promotions*.

To create promotions based on day or time of purchase

1. Create the needed calendar attributes at the Program level.

   For more information, see *About Calendar Attributes* and *Creating Calendar Attributes*.
2. Create promotions with rules that use these calendar attributes in their criteria. In the Criteria view of the rule, in the Compare to Values form:

   a. In the Object field, select Calendar.

b. In the Attribute field, select one of the calendar attributes defined for the program.
c. In the Type of Comparison field, select Compare to Values.
d. Use the Condition field and the Values list to specify values that are compared with the value of the attribute, as you do for other promotions that use Compare to Values as the type of comparison.

Theme-Based Promotions

Theme-based promotions allow you to create promotions that apply for only a limited time after the customer enrolls in the promotion. They can be used to offer rewards that encourage customers to buy products in a specific product line or to buy products in a theme-based assortment. A member can enroll again after the time limit of the initial enrollment has expired.

Scenarios for Theme-Based Promotions

The following scenarios show how promotions rewarding purchases by day and time might be used. You might use them differently, depending on your business model:

- A customer registers at a web site for first-time parents. The web site offers the opportunity to enroll in a promotion that is valid for three months after enrollment that gives rewards for purchases of clothing and other supplies for infants.
- A store that sells maternity clothing offers the opportunity to enroll in a promotion that is valid for one month after enrollment.

In both of these scenarios, customers will be making purchases of themed products for a limited time after enrollment. People need to buy infant supplies or maternity clothing for only a year or less. They enroll in the promotion when this need arises, and they are eligible for the promotion for only a limited time after enrolling.

The theme-based promotion encourages customers to make more of those purchases soon and to make those purchases from this seller.

Creating Theme-Based Promotions

Create theme-based promotions in the same way you create other promotions, using the following fields:

- **Effective Period and Effective Period UOM.** Use these fields to specify how long a member gets rewards after enrolling in this promotion. For example, if you want the member to receive rewards for three months after enrolling, then select 3 in the Effective Period field and select Months in the Effective Period UOM field.
- **Enrollment End.** This field displays the date when the enrollment ends and the member no longer receives rewards. It is calculated based on the values in the Enrollment Starts, Effective Period, and Effective Period UOM fields.

For information about creating promotions, see *Process of Creating Loyalty Promotions*.

6 Working with Siebel Loyalty Program Members

Working with Siebel Loyalty Program Members

This chapter covers the ways that employees at the host company use Siebel Loyalty after the application, programs, promotions, and redemptions have been set up. It includes the following topics:

- *About Working with Siebel Loyalty Program Members*
- *Integrating Loyalty with Cybersource and Taxware*
- *About Using Loyalty Member Services*
- *About Working with Loyalty Members Using the Siebel Application Interface*
- *Bulk Loyalty Membership Administration*
- *Administering Batch Enrollment*

About Working with Siebel Loyalty Program Members

This chapter covers the ways that member service representatives 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 member service representatives:

- **Partners.** Depending on your business model, member service representatives at partner companies can perform some of these tasks for your members. For more information, see *Using Siebel Loyalty with Partners*
- **Members.** Members can use eLoyalty to perform some of these tasks for themselves. For more information, see *Member Self-Service with Siebel eLoyalty*
- **Sales representatives**. Sales representatives also work with program members. For example, sales representatives sell products that earn bonus points for members. Depending on your business model, sales representatives might also redeem members' points for rewards.

After the loyalty administrator has set up loyalty programs and promotions, member service representatives can work directly with program members to help with member services and program administration in the following ways:

- **Member Services.** A task-based user interface that automates certain tasks and also validates member eligibility and the sufficiency of point balances for requested services. In addition, the task-based user interface enables the partner or host company to charge monetary fees for requested member service transactions. These tasks are covered in *About Using Loyalty Member Services*.
- **Working Program Members Using the Siebel Business Application Interface.** For other tasks, the member service representative works with members using the Siebel Business Application interface. These tasks are covered in *About Working with Loyalty Members Using the Siebel Application Interface*.

Integrating Loyalty with Cybersource and Taxware

Through integration with Siebel Order Management, Loyalty can create orders and can capture credit card payment details.

Loyalty uses Cybersource, a third party vendor, to validate and authorize credit card payments. In order for Cybersource to validate credit card details, the following fields must be defined: Credit Card Number, Credit Card Type, Expiration Month, Expiration Year, Billing Address, and Card Holder Name. If any one of these fields are invalid, then the authorization fails. For more information about Cybersource, see the Cybersource documentation.

Siebel Loyalty also uses Taxware International, a third-party service, to calculate the sales tax on orders and other transactions. For tax calculation purposes, every member must have at least one primary address. Without a primary address, the tax defaults to zero. For more information about Taxware International, see the Taxware documentation.

About Using Loyalty Member Services

Member Services are completed by member service representatives using a task-based interface. Member Services include:

- *Enrolling Members in Loyalty Programs*
- *Enrolling Members in Loyalty Promotions*
- *Reissuing Redemption Vouchers*
- *Cancelling Redemption Vouchers*
- *Renewing Loyalty Memberships*
- *Cancelling Loyalty Memberships*
- *Purchasing Lounge Services*
- *Transferring Points Between Loyalty Members*
- *Giving Gift Points from One Loyalty Member to Another Member of the Same Program*
- *Entering Accrual Disputes*
- *Reactivating Loyalty Points*

Enrolling Members in Loyalty Programs

To enroll a new member in a loyalty program, the member service representative must perform the following steps:

- Select a member type and membership scheme. For more information, see *Selecting a Member Type and Membership Scheme*.
- Enter member information, such as name, address, and communication preferences. Depending on which member type you select, Siebel Loyalty will display the view needed to perform one of the following tasks:
  - *Entering Member Information for an Individual Member*
  - *Entering Member Information for an Account Member*

- *Entering Member Information for a Household Member*

- For all membership types, you must assign the member a user name and password. For more information, see *Assigning a Member a User Name and Password*.

For information about creating parent-child memberships, see *Working with Parent-Child Member Relationships*.

CAUTION: If you have set up a registration bonus, then it is applied only if the member is enrolled in the Member screen, as described in this topic. If you add new members in some other view, then they do not get registration bonuses. For more information about registration bonuses, see *Example of Creating an Action-Based Bonus*.

Selecting a Member Type and Membership Scheme

To enroll a member, you begin by selecting the member type and membership scheme. For more information about membership schemes, see *Creating Membership Schemes for Siebel Loyalty*.

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 to earn points for the household's membership. Any household member can make purchases to earn points. The individuals within the household accrue and/or redeem points through the household membership.
- **Account.** This type of member includes companies that join programs. The company earns points for its purchases.
- **Partner.** This type of member includes companies who have partners that join programs. For example, a dealer can be a partner of an automobile manufacturer, because its customers earn the manufacturer's points when they buy cars. The same dealer can join a loyalty program as a member, so the manufacturer can reward the dealer with points for meeting sales goals.

To select a member scheme

1. Navigate to the Loyalty Members screen.
2. Click View, Action Pane, Tasks to view the Task user interface.
3. Click Member Enrollment, and complete the fields described in the following table.

Field	Description
Program Name	Choose the program to enroll in.
Member Type	Choose one of the 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 to earn points for the household's membership. Any household member can make purchases to earn points. The individuals within the household accrue and/or redeem points through the household membership. - **Account.** This type of member includes companies that join programs. The company earns points for its purchases. - **Partner.** This type of member includes companies who have partners that join programs. For example, a dealer can be a partner of an automobile manufacturer, because its customers earn the manufacturer's points when they buy cars. The

Field	Description
	same dealer can join a loyalty program as a member, so the manufacturer can reward the dealer with points for meeting sales goals.
Membership Scheme	Choose the scheme. Schemes indicate the period type and duration of the membership.

4. Click Next.

   The member type you selected determines which fields to display to enter member information.

Entering Member Information for an Individual Member

Use the following procedure to enter membership information for an individual member.

To enroll an individual member

1. In the Individual Member Details - I view, complete the member information fields. Some fields are described in the following table.

Field	Section in Form	Description
Contact First Name and Contact Last Name	Member Information	Select an existing contact or enter a new one. You can associate one or more contacts with a member. When you select the appropriate contact in either of these fields, the name is entered in both fields.
Corporate Member	Member Information	If the member type is individual, then you can select a Corporate Member if applicable.
Referred By and Relationship	Member Information	If applicable, then select the name of the member who referred the new member, and then select the relationship between these two members.
Partner Source	Administration Information	(Optional) Choose a channel partner.
Enrollment Channel	Administration Information	Choose from Web, MSR, External Service Provider, or Partner.
Receive Partner Promos and Receive Promos	Administration Information	Select this check box to receive partner promotions, and indicate the type to receive.
Statement Method	Administration Information	Choose the means of receiving statements.
Number (#) of Children	Administration Information	Specify the number of children.

Field	Section in Form	Description
First Name, Middle Name, Last Name, and so on	Contact Details	Some fields are populated with details from the Member Information section. Enter further personal information about the contact's gender, birthdate, and honorific.
Member Number (#), Name, and so on.	Referrals	If applicable, then enter details about the member who referred the new member.
Program	Membership Scheme Price List	Choose the program to enroll in.
Payment Mode	Membership Scheme Price List	Choose a payment mode.
Pay	Membership Scheme Price List	Specify the payment amount for new members.

2. Click Next, and provide further details about the member in the Individual Member Details - II view. Some fields are described in the following table.

Field	Section in Form	Description
Lounge End Date	Member Information	If this membership is a lounge purchase membership, then specify the end date.
Primary	Personal Address	Select this check box if this address is the primary address.
Address Type	Personal Address	Specify if this address is a Home, Business or Alternate address.
Address Line 1, and so on	Personal Address	Enter the details of street, city, and so on.

3. (Optional) In the Credit Cards section, where any existing information is displayed, you can add a new record to the list, 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 is used as the default payment method for transactions requiring payment. For more information about credit card payments, see *Siebel Order Management Guide* .

4. (Optional) In the Hobbies section, add one or more new records to the list, and enter information about the member's hobbies.
5. (Optional) Enter information about how to contact the member by phone, email, fax and SMS.
6. Click Next, and provide further details about the member in the Individual Member Details - III view:
    - (Optional) Enter the member's preferences for airline, hotel and rental car.
    - Enter the member's passport details.
    - Enter details of an emergency contact person for the member.
    - (Optional) Enter the member's favorite travel destinations.
    - (Optional) Enter the member's frequently travelled routes.
7. Click Next.

   The Member Details view summarizes information about the member, the transaction, and the payment.
8. Click Finish.

When you select an account membership scheme, you can enroll an account member.

Entering Member Information for an Account Member

Use the following procedure to enter membership information for an account member.

To enroll an account member

1. In the Account Member Details - I view, complete the member information fields. Some fields are described in the following table.

Field	Section on Form	Description
Member Name	Member Information	Enter the name of the account member.
Account	Member Information	Select the company name.
Contact First Name and Contact Last Name	Member Information	Select an existing contact or enter a new one. You can associate one or more contacts with a member. When you select the appropriate contact in either of these fields, the name is entered in both fields.
Accrual Type	Member Information	Select an accrual type: corporate only, individual only, or both. **Note:** If you select corporate only, then the individual member is not rewarded. The transaction is processed and if a promotion design is applicable to the transaction, then all the promotions with Admin flags enabled within the promotion design are rewarded to the corporate member.
Statement Method	Administration Information	Choose the means of receiving statements: email or mail.

Field	Section on Form	Description
Partner Source	Administration Information	(Optional) Choose a channel partner.
Enrollment Channel	Administration Information	Choose from Web, MSR, External Service Provider, or Partner.
Receive Partner Promos and Receive Promos	Administration Information	Select these check boxes to receive partner promotions or other promotions.
Account Name	Account Information	Enter the account name.
Site	Account Information	If the account has more than one location, then specify the relevant location for this member.
DUNS	Account Information	Enter the DUNS number that uniquely identifies the account.
Industries	Account Information	Select the industry type.
Founded	Account Information	(Optional) Enter information about the type, size and age of the company.
URL	Account Information	(Optional) Enter information about the type, size and age of the company.
Annual Travel Budget	Account Information	(Optional) Enter information about the type, size and age of the company.
Annual Revenue	Account Information	(Optional) Enter information about the type, size and age of the company.
Revenue Growth Rate	Account Information	(Optional) Enter information about the type, size and age of the company.
Total Employees	Account Information	(Optional) Enter information about the type, size and age of the company.
First Name, Middle Name, Last Name, and so on	Contact Details	Some fields are populated with details from the Member Information section. Enter further personal information about the contact's gender, birthdate, and honorific.

Field	Section on Form	Description
Member Number (#), Name, and so on.	Referrals	If applicable, then enter details about the member who referred the new member.
Program	Membership Scheme Price List	Choose the program to enroll in.
Payment Mode	Membership Scheme Price List	Choose a payment mode.
Pay	Membership Scheme Price List	Specify the payment amount for new members.

2. Click Next, and provide further details about the member in the Account Member Details - II view. Some fields are described in the following table.

Field	Section on Form	Description
Account	Account Member Details	Select the company name.
Accrual Type	Account Member Details	Select an accrual type: corporate only, individual only, or both.
Corporate Member	Account Member Details	(Optional) Select the corporate member.
Primary	Personal Address	Select this check box if this address is the primary address.
Address Type	Personal Address	Specify if this address is a Home, Business or Alternate address.
Address Line 1, and so on	Personal Address	Enter the details of street, city, and so on.

3. (Optional) In the Credit Cards section, where any existing information is displayed, you can add a new record to the list, 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 is used as the default payment method for transactions requiring payment. For more information about credit card payments, see *Siebel Order Management Guide* .

4. (Optional) Enter information about how to contact the member by phone, email, fax and SMS.
5. Click Next, and provide further details about the member in the Account Member Details - III view.
   - (Optional) Enter the member's favorite travel destinations.
   - (Optional) Enter the member's frequently travelled routes.
6. Click Next.

   The Member Details view summarizes information about the member, the transaction, and the payment.
7. Click Finish.

When you select a household membership scheme, you can enroll a household member.

Entering Member Information for a Household Member

Use the following procedure to enter membership information for a household member.

To enroll a household member

1. In the Household Member Details - I view, complete the member information fields. Some fields are described in the following table.

Field	Section on Form	Description
Household	Member Information	If this household is a new household, then enter the name and address details. Otherwise, select from the list of existing households.
Contact First Name and Contact Last Name	Member Information	Select an existing contact or enter a new one. You can associate one or more contacts with a member. When you select the appropriate contact in either of these fields, the name is entered in both fields.
Member Name	Member Information	Enter the member name.
Statement Method	Administration Information	Choose the means of receiving statements: email or mail.
Partner Source	Administration Information	(Optional) Choose a channel partner.
Enrollment Channel	Administration Information	Choose from Web, MSR, External Service Provider, or Partner.

Field	Section on Form	Description
Receive Partner Promos and Receive Promos	Administration Information	Select these check boxes to receive partner promotions or other promotions.
Head of Household	Household Information	Choose the head of the household from the list.
Segment	Household Information	(Optional) Choose the market segment for this household, such as White Collar or Rural.
Category	Household Information	(Optional) Choose the category, such as standard, gold or platinum.
Status	Household Information	Choose the status, such as active or under review.
Type	Household Information	Choose the type of household, such as family with children, or extended family.
Size, Number (#) of Dependents, Child 0-6, Child 7-12, Child 13-18	Household Information	(Optional) Enter the number of family members in the household, the number of dependents, and the number of children in the specified age ranges.
Income	Household Information	(Optional) Choose the income range for the household.
Wealth	Household Information	(Optional) Choose the existing wealth of the household.
Revenue	Household Information	(Optional) Choose the revenue of the household.
First Name, Middle Name, Last Name, and so on	Contact Details	Some fields are populated with details from the Member Information section. Enter further personal information about the contact's gender, birthdate, and honorific.
Member Number (#), Name, and so on.	Referrals	If applicable, then enter details about the member who referred the new member.
Program	Membership Scheme Price List Information	Choose the program to enroll in.

Field	Section on Form	Description
Payment Mode	Membership Scheme Price List Information	Choose a payment mode.
Pay	Membership Scheme Price List Information	Specify the payment amount for new members.

2. Click Next, and provide further details about the member in the Household Member Details - II view. Some fields are described in the following table.

Field	Section on Form	Description
Primary	Personal Address	Select this check box if this address is the primary address.
Address Type	Personal Address	Specify if this address is a Home, Business or Alternate address.
Address Line 1, and so on	Personal Address	Enter the details of street, city, and so on.

3. (Optional) In the Credit Cards section, where existing information is displayed, you can add a new record to the list, 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 is used as the default payment method for transactions requiring payment. For more information about credit card payments, see *Siebel Order Management Guide* .
4. (Optional) Enter information about how to contact the member by phone, email, fax, and SMS.
5. Click Next, and provide further details about the member in the Household Member Details - III view.
   - (Optional) Enter the member's favorite travel destinations.
   - (Optional) Enter the member's frequently travelled routes.
6. Click Next.

   The Member Details view summarizes information about the member, the transaction, and the payment.
7. Click Finish.

Assigning a Member a User Name and Password

For all membership types, you must assign the member a user name and password.

To assign a member a user name and password

1. Navigate to the Administration - User screen, Users view.
2. Add a new record to the Users list, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Last Name and First Name	If the member is an individual, then enter the name of that person. If the member is a household, account, or partner, then enter the name of the primary contact for the member.
User ID	Enter the login name for the user.
Challenge Question	Enter a question that users can enter to establish their identity if they forget their login name or password.
Challenge Answer	Enter an answer to the challenge question.
Responsibility	Select the appropriate responsibility for the member. The responsibility differs based on implementation, depending on the host company's policies.

For more information about creating new users, see the chapter on user administration in *Siebel Security Guide* .

Enrolling Members in Loyalty Promotions

Some promotions are automatically available to all members. Other promotions are only available to members who enroll. These are called opt-in promotions. When members learn about opt-in promotions, they can enroll themselves on the eLoyalty Web site, or they can have a member service representative enroll them.

Incentives are available to members who enroll if you have set up the incentives, as described in *Creating Incentives to Enroll in Promotions*.

To enroll a member in a promotion

1. Navigate to the Loyalty Members screen.
2. Click View, Action Pane, Tasks to view the Task user interface.
3. In the Members list, click the Member Number (#) hyperlink.
4. In the Tasks list, click LOY Promotion Enrollment.
5. Select the promotion and incentives:
   a. In the Loyalty Promotions list, select the promotion to enroll this member in.

      This list displays active promotions with enrollment required. If the host attempts to enroll the member in a promotion that the member is already enrolled in, then the application displays an error message.

b. If there are promotion incentives, then in the Incentive Choices list, select the promotion incentive that the member chooses.

   The member is charged for enrolling into the promotion, as you specified in the Points view of the Promotion Enrollment product that you defined in the Administration - Product screen.

c. Click Next.

6. Enter the cost of enrolling:

   a. Either select the record for the Payment mode that the member is using in the Price Lists list.
   b. Or select the Override Flag checkbox and complete the necessary fields in the Price Override area.
   c. Click Next.

7. If money payment is involved, then enter the payment details. In the Credit Cards list, select the existing credit card used to pay or add a new credit card.
8. Review the order summary, and click Next.
9. Review the transaction details, and click Finish.

Reissuing Redemption Vouchers

In the case where a member loses an issued voucher, the member can request that the voucher be reissued. A voucher can be reissued only if the status is either Available or Reserved.

Before the member service representative can reissue the voucher, a loyalty administrator must create a reissue voucher product. For more information about setting up products, see *Siebel Product Administration Guide* .

Once the voucher reissue product is created, a loyalty administrator must associate the voucher reissue product with a service. For more information, see *Setting Prices for Member Services*.

To reissue a voucher

1. Navigate to the Loyalty Members screen.
2. Click View, Action Pane, Tasks to view the Task user interface.
3. In the Members list, click the Member Number (#) hyperlink.
4. In the Tasks list, click Redemption Voucher Reissue.
5. In the Voucher Number list, highlight the voucher to be reissued and click Next.
6. Select the fee option. Options are: Points, Pay, and Points+ Pay.

   > **Note:** There can be more than three price options if options are defined in combinations of multiple point types and multiple currencies.

7. To override the calculated price, select Override Price and select an Override reason code.
8. Click Next.
9. Either select the shipping address or enter new address if the voucher must be shipped to an address other than the existing addresses of the member.
10. Click Next.
11. If a monetary payment is required, then enter the member's credit card information and click Next.
12. Review order summary and click Next.
13. Review order confirmation and click Next.
14. Review the new voucher details and click Finish.

Cancelling Redemption Vouchers

Voucher cancellation occurs when a member redeems points to purchase a redemption voucher, but subsequently returns the voucher to refund points to his point balance. Only unused vouchers can be cancelled.

In order to cancel a redemption voucher, the status must be either:

- Available
- Reserved

Vouchers with the following statuses cannot be cancelled:

- Used
- Cancelled
- Expired
- Reissued

Before the member service representative can cancel the redemption voucher, a loyalty administrator must create a cancel redemption voucher product. For more information about setting up products, see Siebel Product Administration Guide.

Once the purchase points product is created, a loyalty administrator must associate the purchase points product with a service. For more information, see *Setting Prices for Member Services*.

To cancel a redemption voucher

1. Navigate to the Loyalty Members screen.
2. Click View, Action Pane, Tasks to view the Task user interface.
3. In the Members list, highlight the Member.
4. In the Tasks list, click LOY Redemption Cancellation.
5. Click the Voucher radio button, then click Next.
6. In the Voucher list, select the Voucher.
7. Confirm voucher details and click Next.
8. Enter Refund details and click Next.
9. If you selected Override, then enter Override details and click Next.
10. Review Order Summary and click Next.
11. Review Cancellation Summary and click Finish.

Renewing Loyalty Memberships

You can use Siebel Loyalty to assist members with membership renewals.

To renew a membership

1. Navigate to the Loyalty Members screen.
2. Click View, Action Pane, Tasks to view the Task user interface.
3. In the Members list, click the Member Number (#) hyperlink.

4. In the Tasks list, click Membership Renewal.
5. Select New Membership Scheme and click Next.

   The membership scheme duration and type are retrieved from the product level loyalty attributes.
6. In the Price Lists list, select a Payment Mode and click Next.

   Payment options are pay, points, or a combination of the two.
7. (Optional) In the Price Override section:

   a. Select the Override Flag checkbox.
   b. Enter the Override Points and/or Override Pay.
   c. Choose an Override Reason Code, enter an Override Reason, and click Next.
8. Make any necessary changes to the credit card information, and click Next.
9. Verify the information in the Order Summary is correct, then click Next.
10. Verify the information in the Order Confirmation is correct, then click Next.
11. Verify the information in the Transaction Details is correct, then click Finish.

Cancelling Loyalty Memberships

When a member has paid to purchase a membership, but then decides to cancel the membership before the end of the membership term, the member might be eligible for a refund of part or all of the membership fees.

The fee refund options are:

- An amount pro-rated to the remaining portion of the membership term
- A percentage of the original purchase price
- No refunds

Where a refund is made, the amount includes:

- The portion of the membership fee
- The corresponding portion of any taxes paid on the membership fee

To cancel a membership

1. Navigate to the Loyalty Members screen.
2. Click View, Action Pane, Tasks to view the Task user interface.
3. In the Members list, click the Member Number (#) hyperlink.
4. In the Tasks list, click LOY Membership Cancellation Service.
5. Enter Cancellation Code.
6. Select Fee Refund basis, options are: No Refund, Percentage, or Prorata. If you select either Percentage or Prorata, then enter the Percentage.
7. To override the calculated price, select Override Price and select an Override reason code.
8. Click Next.
9. If a refund is necessary, then select Payment Mode. If you selected percentage as the fee refund basis, then enter Elapsed Day, Elapsed % Fees Paid, and Tax Paid.
10. Click Next.
11. Verify payment information and click Next.
12. Verify the information in the Order Summary is correct, then click Next.

13. Verify the information in the Order Confirmation is correct, then click Next.
14. Verify the information in the Transaction Details is correct, then click Next.

Purchasing Lounge Services

You can use Siebel Loyalty to assist loyalty members who want to purchase lounge services.

To purchase lounge service

1. Navigate to the Loyalty Members screen.
2. Click View, Action Pane, Tasks to view the task user interface.
3. In the Members list, click the Member Number (#) hyperlink.
4. In the Tasks list, click Member Lounge Purchase.
5. Select Lounge Period Type.
6. Select Lounge Period duration and click Next.
7. In the Price Lists list, Select Payment Mode and click Next.
8. (Optional) In the Price Override section:
    a. Select the Override Flag checkbox.
    b. Enter the Override Points and/or Override Pay.
    c. Choose an Override Reason Code, enter an Override Reason, and click Next.
9. Make any necessary changes to the credit card information, and click Next.
10. Verify the information in the Order Summary is correct, then click Next.
11. Verify the information in the Order Confirmation is correct, then click Next.
12. Verify the information in the Transaction Details is correct, then click Finish.

Purchasing Loyalty Points

If a member does not have enough points to qualify for a desired redemption, then some host companies allow the member to purchase enough points to qualify.

To purchase points

1. Navigate to the Loyalty Members screen.
2. Click View, Action Pane, Tasks to view the Task user interface.
3. In the Members list, highlight the Member.
4. In the Tasks list, click LOY Member Points Purchase.
5. Select Point Type.
6. In the Points field, enter the quantity of points to be purchased. Then click Next.
7. In the Price list, select the payment type.
8. To override the calculated price, select Override Price and select an Override reason code.
9. Click Next.
10. Confirm the price and select a credit card.
11. Click Next.
12. Review Order Summary and then click Next.
13. Review Transaction Details and then click Finish.

Transferring Points Between Loyalty Members

You can create a transaction to transfer points from one member to another. This type of action requires approval. The transferred points retain the same point type and expiration date as when they resided in the original account. You cannot cancel this kind of transaction; if the transfer was made in error, then you must create another transaction to transfer the points back.

The following guidelines apply to point transfers:

- A point transfer does not affect the point block that the points came from. When a transfer occurs, those points already belong to the donor member and therefore have already been deducted from a point block.
- You can only transfer available points, *not* qualifying points. In other words, you cannot use point transfers to move members up or down tiers.
- You cannot cancel a point transfer. If you transferred points by mistake, then you must transfer the points back in a separate transaction.
- Points can only be transferred between members who have the same membership type and belong to the same program.

To transfer points from one member to another

1. Navigate to the Loyalty Members screen.
2. Click View, Action Pane, Tasks to view the Task user interface.
3. In the Members list, highlight the Member.
4. In the Tasks list, click LOY Member Points Transfer.
5. Select Point Type.
6. Select the Transferee Member.
7. In the Points field, enter the quantity of points to be transferred. Then click Next.
8. In the Price list, select the payment type and click Next.
9. To override the calculated price, select Override Price and select an Override reason code.
10. Click Next.
11. Confirm the price and enter credit card details.
12. Click Next.
13. Review Order Summary and then click Next.
14. Review Order Confirmation and click Next.
15. Review Transaction Details and then click Finish.

Giving Gift Points from One Loyalty Member to Another Member of the Same Program

You can create a transaction to allow one member give gift points to another member of the same program. This transaction is similar to transferring points between members, as described in *Transferring Points Between Loyalty Members*.

The key difference between points transfer and gift points is that a member can give gift points even if the member does not have a large enough balance of points to cover the gift, while a member can transfer points only if the member

has a large enough balance to cover the transfer. In addition, you can limit the number of gift points members can give and receive to prevent abuse, as described in *Defining Point Gift Setup*.

You can charge members for this service in cash. You must use the payment mode of pay, and you cannot use pay plus points.

To give gift points from one member to another

1. Navigate to the Loyalty Members screen.
2. Click View, Action Pane, Tasks to view the Task user interface.
3. In the Members list, highlight the active member who is giving the gift.
4. In the Tasks list, click LOY Member Points Gift.
5. In the Gifts Points form, complete the necessary fields. Some fields are described in the following table.

   Note: If the gift violates the limits defined in Point Gift Setup, then an error message appears.

Field	Description
Recipient Member	Select the active member who is receiving the gift.
Available Points	Displays the available member point balance. This balance is the maximum that the giving member can give to the recipient member.
Point Type	Select the point type of the points being given.
Points	Enter the number of points being given.

6. Confirm the price, and select a credit card.
7. Click Next.
8. Review the order summary, and then click Next.
9. Review the transaction details, and then click Finish.

Entering Accrual Disputes

When members do not receive point credits for valid accrual transactions, they contact a member service representative to help resolve the accrual dispute. You can use Siebel Loyalty to capture accrual dispute data and send the data to the partner to validate.

Types of disputes captured by Siebel Loyalty include:

- Missing Accrual Dispute. A member claims that an accrual transaction does not appear on his or her statement.
- Incorrect Accrual Dispute. A member claims that points received for an accrual transaction are not correct. In addition, the member must provide supporting documentation to resolve the dispute.

Whether the disputes are submitted to the partner for review depends on the settings described in *Sending Accrual Disputes to Partners for Review*.

Creating a Missing Accrual Dispute

The following procedure describes how to create a missing accrual dispute.

To create a missing accrual dispute

1. Navigate to the Loyalty Members screen.
2. Click View, Action Pane, Tasks to view the task user interface.
3. In the Members list, click the Member Number (#) hyperlink.
4. In the Tasks list, click Create Accrual Dispute.
5. Select Missing Accrual from the Dispute Type drop down list.
6. Select Type of Product. Options include: Air, Hotel, Car, or Other. Then click Next.
7. Enter the mandatory attributes shown in the following table.

Field	Description
Transaction Date	Enter the transaction date.
Partner Name	Select the partner.
Product	Select the product.

> **Note:** These fields might vary depending on the type of product selected in the previous step.

8. Click Submit.

Creating an Incorrect Accrual Dispute

The following procedure describes how to create an incorrect accrual dispute.

To create an incorrect accrual dispute

1. Navigate to the Loyalty Members screen.
2. Click View, Action Pane, Tasks to view the Task user interface.
3. In the Members list, click the Member Number (#) hyperlink.
4. In the Tasks list, click Create Accrual Dispute.
5. Select Incorrect Accrual from the Dispute Type drop down list, then click Next.
6. In the Transactions list, highlight the Transaction and click Next.
7. Update the incorrect transaction details and click Next.
8. Verify the information in the Transaction Summary is correct, then click Submit.

Partner Review of Accrual Disputes

Whether the disputes are submitted to the partner for review depends on the settings

All the disputes are in Partner Pending status and are submitted to the partner user. You can also schedule the LOY Export Transactions workflow as a background process that generates an XML file of all the transactions.

Once the partner can validate the data, then the partner can credit points to the member.

Reactivating Loyalty Points

If members do not use all their points and some points expire, then the members might want to reactivate expired points. If you enable point reactivation, then the customer service representative can reactivate non-qualifying points that have expired. The customer sales representative cannot reactivate qualifying points.

You specify how long reactivated points remain active when you define the Points Reactivation product.

You specify which point types can be reactivated and how long they can be activated after they expire when you define point types. The customer sales representative cannot reactivate more points than the number that have expired recently enough that they can still be reactivated.

The member pays for this service in cash.

To make it possible for the member service representative to reactivate points, the administrator must perform the following setup tasks:

- Enable reactivation while creating the point type, as described in *Defining Point Types and Subtypes for Loyalty Programs*.
- Create the administrative promotion described in *Creating the Admin - Points Reactivation Promotion*.
- Set up pricing for reactivation by creating the Points Reactivation product, as described in *Setting Prices for Member Services*.

To reactivate Loyalty points

1. Navigate to the Loyalty Members screen.
2. Click View, Action Pane, Tasks to view the task user interface.
3. In the Members list, click the Member Number (#) hyperlink.
4. In the Tasks list, click Create Reactivation Point Details.
5. Select the Point Type and the Reactivation product, and click Next.

   Only point types that are enabled for reactivation are displayed in the list you select from.
6. Enter the number of points to be reactivated, and click Next.

   You cannot enter a number greater than the number of points that expired during the specified time period.
7. Select price options and enter payment details and click Next.

   Payment must use the Pay method. Pay plus points is not available.
8. Review the summary of the transaction, and click Submit.

About Working with Loyalty Members Using the Siebel Application Interface

After the loyalty administrator has set up loyalty programs and promotions, member service representatives can work directly with program members to help with the following tasks:

- *Entering Loyalty Members' Transactions*

- *Viewing Transaction Details*
- *Viewing Loyalty Member Details*
- *Working with Parent-Child Member Relationships*
- *Entering Loyalty Member Referrals*
- *Entering Loyalty Members' Profiles and Preferences*
- *Viewing Loyalty Members' Promotions*
- *Entering Loyalty Members' Orders*
- *Approving Loyalty Members' Transactions*
- *Cancelling Loyalty Members' Transactions*
- *Restricting Transactions Based on Membership Status*
- *Entering and Modifying Loyalty Members' Service Requests*
- *Managing Loyalty Members' Vouchers*
- *Changing Loyalty Members' Tier Status Manually*
- *Creating a Loyalty Membership Card Manually*
- *Lending Points to Loyalty Members*
- *Restricting Loyalty Point Transfers*
- *Restricting Loyalty Point Purchases*
- *Merging Loyalty Program Members*
- *Generating, Viewing, and Printing Loyalty Members'Statements*

Entering Loyalty Members' Transactions

A Transaction is any action that accrues ("earns") or debits ("burns") points for a member. There are the following types of transactions:

- **Accrual Transactions.** The member performs some activity that earns points. Members can accrue points on purchasing products from the host organization or from partners. 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, such as a product, a service, or an upgrade, and the points are debited from the member's account. The member redeems points for a reward with host, the partner or using the eLoyalty Member Portal.
- **Service Transactions.** The member purchases some service, such as enrollment, lounge purchase, membership renewal, or voucher reissue, and the points are debited from the member's account.
- **Custom Transactions.** You can also create custom transactions to suit your business model.

These transactions are also 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.

When redeeming points for a reward, the member can choose to pay for the transaction entirely with points, or with a combination of points and other values such as cash or a credit card charge.

> **Note:** As an alternative to the Members screen, transactions can also be entered in the Transactions screen. If you require additional fields, then you can add them to the Transactions screen by extending the Transaction business component using Siebel Tools. For more information about Siebel Tools, see *Using Siebel Tools* .

To enter a transaction

1. Navigate to the Loyalty Members screen.
2. In the Members list, click the Member Number (#) 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	Description
Transaction Date	Displays the date when the transaction occurred. This date is used as the date when the customer earns the points. **Note:** To decide whether a promotion applies to a transaction, the Siebel Loyalty Engine evaluates whether the transaction's Transaction Date (not its Processed On Date) is within the promotion's start and end dates, inclusive.
Type	Select whether the transaction is Accrual, Redemption, Service, or Custom.
Sub Type	Select the Subtype for the transaction: - **Accrual transactions.** The subtypes are: Action Based Bonus, Cancellation, Gift, Loan, Product, Incorrect Accrual, Manual Credit, and Missing Accrual. - **Redemption transactions.** The subtypes are: Availment, Cancellation, Loan Repayment, Manual Debit, Product, and Transfer. - **Service transactions.** The subtypes are: Membership Renewal, Voucher Reissue, Enrollment, Points Purchase, Points Transfer, Membership Cancellation, and Lounge Purchase. - **Custom transactions.** The subtypes depend on the subtypes you define.
Status	Select the status of the transaction from these options: - **In Progress.** 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 manager selects this value to reject the transaction. - **Approved.** The MSR or manager selects this value to approve the transaction. - **Acceptable.** If the status is Acceptable, then the user can process the transaction in real time by clicking the Process button. The engine does not process transactions with this status; the user must click the Process button. For information about when transactions are created with the status Acceptable, see *Allowing Manual Processing of Queued Transactions*. - **Queued.** If the status is Queued, then the engine component that is invoked by clicking the Process button does not process this transaction. It is only processed by the batch engine.

Field	Description
	○ **Partner Pending.** Indicates that an action from a partner is required before the transaction can be processed. The possible actions by a partner are Partner Approved and Partner Rejected. The field can also display the following values, generated by Siebel Loyalty: ○ **Rejected - Engine: Insufficient Points.** Siebel Loyalty sets the field to this value if the member does not have enough points for the redemption transaction. ○ **Rejected - Engine: Missing Member Data.** Siebel Loyalty sets the field to this value if required data about the member is missing.
Corporate Reference	Displays the Member ID of an Account Member if the current individual member is on a Corporate flight. The points accrued is controlled by the attributes defined at the Individual Member level (to validate whether he is actually affiliated with a particular corporation) and the Account Member level (to validate accrual type).
Product Name	If the subtype is Product, then select the name of the product.
Base Points	Displays the minimum number of points a member would receive (if this transaction is an accrual) or use (if this transaction is a redemption). All promotion calculations (such as a 50% bonus) are based on this value.
Point Type	Select the base point's type. For more information about point types, see *Creating Point Types for Loyalty Programs*.
Qualifying Points	Displays whether the base points are qualifying or nonqualifying (bonus) 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. To process the transaction without manager approval, leave this field empty and follow the instructions in *Entering Loyalty Members' Transactions*. For information about setting up the manager's approval limit, see *Adding Employees as Loyalty Users*.

5. You can view more information about a transaction by clicking the hyperlink in the Transaction Id field. Click the Points Items view and look at the Accrual Items list, if this transaction is an accrual transaction, or at the Redemption Items list, if this was a redemption transaction. The Accrual Items list shows all of the points that a member earned for this single transaction. The Redemption Items List shows the original accruals that were used to pay for the redemption. Both these lists are read-only.
6. If you want to process this transaction without manager approval, then:
   a. Click the hyperlink in the Transaction Id field.
   b. In the More Info form, select the External check box.
   c. In the Transaction form, in the Status field, select Acceptable.

Viewing Transaction Details

A single transaction can give a member points of multiple point types. For example, assume a program has two point types: Regular and Special. A transaction is created and processed for a member and the member earns Regular points as the base points. Another promotion is running that applies to this transaction and gives the member Special points. So, when the transaction is processed, the member earns both Regular and Special points.

To view transaction details

1. Navigate to the Loyalty Members screen.
2. Click the Member Number (#) of the desired member.
3. Click the Transactions view tab.
4. Click the Transaction Id of the desired transaction.
5. Look in the following places:
    - The Total Points field in the Transactions list.
    - The Accrual Items list in Loyalty Member, Transactions, Point Items view.
    - The promotion details applied on a transaction in Loyalty Member, Transactions, Processing Info view.

Using Transactions with Consolidated Accrual Items

Members of retail loyalty programs generally earn a small numbers of points for each transaction. For example, customers at a supermarket chain might have 50 to 100 items in an order, which would create at least that many accrual items in Siebel Loyalty.

A single redemption might process such a large number of items that it slows the redemption process. For example, for a single redemption transaction of 5000 points, the Loyalty engine might have to consume hundreds of accrual items, each with a value of ten to twenty.

To speed up the process of redemption for retail loyalty programs, Siebel Loyalty lets you consolidate all the accrual items of a single order into a single accrual item. The Loyalty engine processes the single consolidated accrual item, saving it the time of processing all of the individual accrual items. Consolidation is synchronous with the processing of each individual transaction.

Consolidating Accrual Items for Retail Transactions

The accrual items consolidation process applies to all transactions which have *Retail* selected in the Source field. The accrual items for all transactions that have the same order number are added based on their point type and expiry dates.

Create consolidated accrual transactions in the same way you create other accrual transactions. For more information, see *Entering Loyalty Members' Transactions*.

These transactions are consolidated under the following conditions:

- In the Source field in the Transaction list, *Retail* is selected.
- In the Order Number field, multiple transactions have the same order number, with Retail selected for all these transactions.

- It is recommended that the transactions have few promotions that apply to them.

Viewing Accrual Line Items for Transactions with Consolidated Accrual Items

You can view the accrued points for each accrual line item in a transaction with consolidated accrual items. The line items all must have Retail entered in the Source Field.

To view line items for transactions with consolidated accrual items

1. Navigate to the Loyalty Transactions screen.
2. In the Transactions list, drill down on the Transaction ID of a consolidated accrual transaction.
3. Click the Point Items view tab.

   The Accrual Line Items list contains all the individual accrual items that were rewarded in the transaction.

Viewing Total Accrued Points for Transactions with Consolidated Accrual Items

Note: The consolidated reward for all the transactions in that order can be viewed in the Points Balances view. Search for the order number, and the accrual item shows the consolidated value for this order.

To view total accrued points for transactions with consolidated accrual items

1. Navigate to the Loyalty Members screen.
2. Drill down on the member who performed the transaction.
3. Click the Point Items view tab.
4. In the Point Items list, in the Order Number field, query to find the order you want.

   The Point Item record shows the total consolidated number of points for this order in the Qty, Point Type, and Point Sub Type fields.

Cancelling Transactions with Consolidated Accrual Items

To cancel a transaction that is associated with consolidated accrual items, you can use the Cancel Order Web service. You can either:

- Cancel an entire order, which cancels all transactions associated to the order. To cancel the order, pass the Source field of Retail and the Order Number (#) to the Web service.
- Cancel a single transaction in the order. To cancel a transaction, pass the Source field of Retail and Transaction Id to the Web service.

For more information, see *Siebel CRM Web Services Reference* .

When you cancel a transaction, the accrual line items associated with the transaction are reverted to their previous value, and the accrual item associated with the transaction is consumed. The cancellation works in the same way as a cancellation of a non-consolidated accrual item: if the accrual item is partially or fully used, then other accrual items are consumed to redeem points equivalent to the points of the canceled accrual line item. You can also cancel individual transactions in the usual way, described in *Cancelling Loyalty Members' Transactions*.

Viewing Loyalty Member Details

You can use Siebel Loyalty to view member details such as point balances, transaction histories, member activities, and promotion attributes.

In the More Info view, you can also select a number from 1 to 5, to indicate the member's value as a customer in the Lifetime Value Score field.

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*.

To view a member's point balance

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the member and click its Member Number (#) hyperlink.

   The member's balances for point type 1 appears in the member form, in the Available Points, Qualifying Points, and Lifetime Qualifying Points fields.
3. Click the More Info view tab.

   The member's point balances for point types two and three appear in the Points Status sections.

   > **Note:** You can also click on the Point Balance view tab to see a list of all the point types defined for the program and the points earned by the member for each of these point types.

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.

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

Expiration dates are calculated at the point item level based upon the rules described previously. All of the points within a point item are of the same point type and have the same expiration date.

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

All of the points associated with a single point item do not have to be used at once. For example, if a redemption requires 500 points and the point item closest to expiring has 1,000 points, then 500 of those points are used for the redemption. The remaining 500 points either are used by a later redemption or expire. The point items that are used for a redemption transaction can be seen in the Loyalty Member, Transactions, Redemption Items list.

To view a member's point items

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the member and click its Member Number (#) hyperlink.
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.

> **Note:** For accruals whose expiry date is in the past, you can click the Expire Points button to deduct remaining points from a member's point total and increment the accruals used point total. A redemption record is also created. The Expire Points button only works for accruals whose expiry date is in the past.

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 might have to look at the transaction history to resolve members' questions about their point balance.

Use the Transactions view of the Members screen to look at the history of all the transactions that affect a given member's point balance. For more information about the Transactions view, see *Entering Loyalty Members' Orders*.

Viewing Loyalty Members' Activities

You can configure the product with Siebel Tools to get a more complete understanding of the members activities by creating an Activity record 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 and click its Member Number (#) hyperlink.
3. Click the Activities view tab.

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 Programs*.

To view a member's attributes

1. Navigate to the Loyalty Members screen.
2. In the Members list, click the Member Number (#) of the member whose attributes you want to view.
3. Click the Member Attributes view tab.

Viewing Loyalty Members' Promotion Attributes

Promotion attributes are used in the rules for a single promotion (as opposed to member attributes, which apply to a member across all promotions). For more information about promotion attributes, see *Creating Attributes for Loyalty Programs*.

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.

For example, suppose you create a promotion in which a member who purchases three SFO-IAD flights in a six-month period receives a reward of 1,000 bonus points. You set up a promotion attribute to track the number of times a specific member has purchased this flight. When a member calls to ask how close she is to earning the bonus points, you can check by using the procedure that follows.

This list displays information for all promotion attributes that have a value, regardless of whether the promotion requires enrollment or applies 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 and click its Member Number (#) hyperlink.
3. Click the Promotion Attributes view tab.

Working with Parent-Child Member Relationships

Siebel Loyalty enables parent members to accrue points to their balances based on child member activity.

The purpose of this feature is to allow a single parent member to act as the holding account for multiple child members. The feature takes the accrual transactions of child members and aggregates them to their parent member. For example, an account or a household can be a parent member in an airline or retail loyalty program. In this case, all child members of the account or household accrue their transactions directly to the parent.

> **Note:** Only an individual member can be a child member of a household member, and the individual member can be a child member of only one household. Only a household member can have individual members as child members.

This feature is useful for companies that wish to receive the points for any business transactions by their employees (because the company pays for the purchases that earn the points). In this case, the child members are the company's employees, and the parent member is the company itself.

Suppose an employee takes a business flight, paid for by the company. The flight earns 100 qualifying points and 100 nonqualifying points. The employee's points are set to roll up to the company. Siebel Loyalty creates the following transactions, in this sequence:

1. **Accrual to child member.** The child member (the employee) accrues 100 qualifying points plus 100 nonqualifying points. The transaction credits 200 points from the appropriate point block to the child member, who then has an available balance of 200 points. In addition, the child member earns 100 qualifying points at the tier level.

2. **Redemption from child member.** One hundred qualifying points and 100 nonqualifying points are redeemed from the child member. However, Siebel Loyalty does not nullify the qualifying points. The child member's available points balance is 0, and the qualifying points balance is 100. The transaction has no effect on the point block.
3. **Accrual to parent member.** This replicates the first transaction. 100 qualifying points and 100 nonqualifying points are accrued to the parent member (the company). The parent member's available points balance is 200, and the qualifying points balance is 100. The transaction has no effect on the point block.

If a child member transaction is canceled, for example, because the member returns goods, then the transaction accruing points to the parent member is also canceled. The points are redeemed from the parent member and credited to the appropriate point block.

Parent-child member transactions use the Admin - Point Transfer promotion. To work with parent-child member relationships, perform the following tasks:

- *Setting up Parent-Child Member Relationships*
- *Rolling Up Points from Child Members to a Parent Member*

Setting up Parent-Child Member Relationships

You can set up a multilevel membership in a program by enrolling all program participants as members, then associating some members as child members with a specific parent member.

> **Note:** Child members are only allowed for account and household members, not for individual members.

To set up parent-child member relationships

1. Enroll parent members and children members separately, as described in *Enrolling Members in Loyalty Programs*.
2. Associate child members with their parent members as follows:
   a. Navigate to the Loyalty Members screen.
   b. In the Members list, click the Member Number (#) hyperlink for the parent member.
   c. Click the Child Members view tab.
   d. In the Child Members list, add one or more new records.
   e. In the Contact field, Account field, or Household field of each new record, select child members for this parent member.

   In the child member's record in Member screen, More Info view, the parent member is now shown in the Parent Member field.

Rolling Up Points from Child Members to a Parent Member

After adding the child member and parent member, you can roll up points using the following procedure.

> **Note:** The points are not double-counted, because only the child member or the parent member has them as available points at any given time. However, for purposes of placing members in a tier level, the same qualifying points count as credit for both the child member and the parent member.

To roll up points from child members to 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 parent member record's Member Number (#) hyperlink.
4. Click the Child Members view tab.
5. In the Child Members list, select a child member whose points you want to add to the parent member's balance.
6. Click the child member record's Member Number (#) hyperlink.
7. Click the More Info view tab, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Accrual To	Member to which the child's points are credited. Select the parent member.
Auto Accrual Start Date	Start date for the transactions that roll up points from the child member to the parent member. Accept the default of today's date or enter a future date. **Note:** You cannot set this field to a date in the past.

As of the Auto Accrual Start Date, the child member's points are added to the parent member's balance. In addition, the Siebel Loyalty adds subsequent point accruals by the child member to the parent member's balance.

Entering Loyalty Member Referrals

When you enroll a new member, you can enter the member who referred the new member, and specify their relationship.

The member referrals list can potentially be used to give out reward points to members who refer many new members. For information about creating a referral bonus, see *Example of Creating an Action-Based Bonus*.

Note: If members register through the Web and enter the members who refer them, then 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 Member Number (#) hyperlink.
4. Click the Referrals view tab.
5. In the Referrals list, add a record, and complete the necessary fields that describe the new member.

Note: Only individual members can be referred. The relationship is created between the primary contact of the new member and the contact/household/account of the primary member. These relationships can be updated only through the Contact/Account/Household screen.

Entering Loyalty Members' Profiles and Preferences

You can track members' profiles and preferences, to provide them with service more effectively and to target promotions. For more information on entering members' profiles and preferences, see the following topics:

- *Entering Loyalty Members' Travel Profiles*
- *Entering Members' Hobbies*
- *Entering Members' Favorite Travel Destinations*
- *Entering Members' Frequently Travelled Routes*

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':

- Preferred airlines, hotels, and car-rental agencies
- Home airport
- Hobbies, favorite travel destinations and frequently travelled routes

Members can enter their travel profile through the eLoyalty Web site, or the Member Service Representative can enter the travel profile.

> **Note:** The values available in the travel profile depend on the partner type entered in the Partner screen, More Info view. For example, if you select Airline as the partner type for a partner, then that partner can be chosen as a preferred airline in Travel Profile view. If you cannot select a partner that you must be able to select in one of these fields, then go to Partner screen, More Info view and make sure the value in the Partner Type field for that partner is the same as one of the current values available in the drop-down list for the Partner Type field.

To enter a member's travel profile

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the member and click its Member Number (#) hyperlink.
3. Click the Travel Profile view tab.
4. In the Travel Profile form, click New and complete the necessary fields.

Entering Members' Hobbies

You can track members' hobbies to provide them with service more effectively and to target promotions.

To enter a member's hobbies

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the member and click its Member Number (#) hyperlink.
3. Click the Hobbies view tab.
4. In the Hobbies form, click New and complete the necessary fields.

Entering Members' Favorite Travel Destinations

You can track members' favorite travel destinations to provide them with service more effectively and to target promotions.

To enter a member's favorite travel destinations

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the member and click its Member Number (#) hyperlink.
3. Click the Favorite Travel Destinations view tab.
4. In the Favorite Travel Destinations form, click New and complete the necessary fields.

Entering Members' Frequently Travelled Routes

You can track members' frequently travelled routes to provide them with service more effectively and to target promotions.

To enter a member's frequently travelled routes

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the member and click its Member Number (#) hyperlink.
3. Click the Frequently Travelled Routes view tab.
4. In the Frequently Travelled Routes form, click New and complete the necessary fields.

Viewing Loyalty Members' Promotions

Some promotions are automatically available to all members. Other promotions, called opt-in promotions, are only available to members who enroll.

The Promotions, Enrolled Promotions view of the Members screen lists all opt-in promotions that a member is enrolled in, regardless of who enrolled the member, so it can be used to view all the promotions that a member is enrolled in. This same view can also be used to enroll the member in a new promotion, but it is recommended that you use the member service described in *Enrolling Members in Loyalty Promotions*.

The Promotions, Applicable Promotions view of the Member screen lists all promotions that apply to a member, including opt-in promotions and promotions that automatically apply to all members.

Viewing the Promotions a Member Has Enrolled In

The following procedure describes how to view promotions that a member has enrolled in.

To view promotions a member enrolled in

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the member to be enrolled.
3. Click the Member Number (#) hyperlink.
4. Click the Promotions view tab.
5. In the Promotions link bar, click Enrolled Promotions.

Viewing the Promotions that Apply to a Member

The following procedure describes how to view all promotions that are available to a member.

To view all promotions that apply to a member

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the member to be enrolled.

3. Click the Member Number (#) hyperlink.
4. Click the Promotions view tab.
5. In the Promotions link bar, click Applicable Promotions.

Entering Loyalty Members' Orders

When you enter an order for a member, the member can earn multiple types of rewards for one accrual. The member can also use multiple types of payment for one redemption.

Orders can also be used when a member uses cash to purchase a product (an accrual) or uses points to purchase a product (a redemption). An order allows you to charge the member currency amounts for the purchase price, taxes and shipping and handling.

Orders are related to transactions, because when an order is submitted, a Transaction is automatically created for each order line item that accrues or debits points. Transactions only handle point accruals and debits, they do not involve order billing.

An order can have several lines, where each line represents a purchase. For example, if you purchase a camera, a lens, and a camera bag, then the order placed has three lines, one line for each of the products purchased. If the Order flag in the promotions screen is set to Yes, then Loyalty tracks all promotion level attributes, but only for that order. You can use this feature to set up order level promotions at a store. For example, you could set up a promotion so that if a customer buys a camera and a lens in the same order, then the customer receives a 5% discount.

For detailed information about entering orders, see the chapter on creating a quote or order in *Siebel Order Management Guide* .

To enter a member's order details

1. Navigate to the Loyalty Members screen and locate the member whose order you want to enter.
2. Click the hyperlink in the Member Number (#) field and click the Orders view tab.
3. In the Orders list, add a new record, and complete the necessary fields.

   In the Type field, select Sales Order.
4. Click the hyperlink in the Order Number (#) field.
5. On the Sales Order form, select the applicable Price List.
6. Click the Line Items view tab.
7. Add a new record to the Line Items list, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Product	Select the product for which the member can earn base points and special points.
Txn Type	Select Accrual.
Point Type	Select the record for the type and number of points that applies to this order.

8. If this item is taxable and you have Taxware installed, then from the view-level menu, choose Calculate Tax.

The totals are updated to reflect the taxes charged on the item.

9. Click the Payments view tab and enter a form of payment for the order.
10. If the form of payment is a credit card, then click Authorize.
11. Click Submit.

    A Transaction is automatically created for each order line item that accrues or debits points.
12. To verify that transactions were created:
    a. Navigate to the Loyalty Members screen and locate the member whose order you entered.
    b. Click the hyperlink in the Member Number (#) field and click the Transactions view tab.
    c. In the Transactions list, query for the Order Number (#) of the order you just processed.
    d. Verify that one transaction was created for each order line item.

Entering an Order Payment in Points and Currency

When entering an order on behalf of a loyalty member, you can specify payment with a combination of points and currency. This ability is only available for products that are set up for multiple methods of payment. For more information, see *Setting Up Products for Redemption by Siebel Loyalty*.

When you enter an order to be paid with a combination of points and money, Siebel Loyalty uses the following formula to calculate how much money is needed to complete the transaction:

```
[Member's Price] = [List Price] - ([Cost Per Point] * [Points to Use])
```

For example, suppose a particular airline flight costs $100 and each point is worth $1 toward the flight's purchase price. A member wishes to pay 50 points toward that purchase. When you create a sales order and enter the points to use toward the purchase, Siebel Loyalty calculates the price as $50.

For detailed information about entering orders, see the chapter on creating a quote or order in *Siebel Order Management Guide* .

To enter an order payment in points and money

1. Navigate to the Loyalty Members screen and locate the member whose order you want to enter.
2. Click the hyperlink in the Member Number (#) field and click the Orders view tab.
3. On the Orders screen, enter a new order.
4. In the Type field, select Sales Order.
5. Click the hyperlink in the Order Number (#) field.
6. On the Sales Order form, select the applicable Price List.
7. Click the Line Items view tab.
8. Add a new record to the Line Items list, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Product	Select a product that is set up for multiple methods of payment.
Net Price	Displays what the product costs in currency, after the value in the Points field is subtracted from the total price of the item.
Txn Type	Select Redemption.

Field	Description
Points	Enter a number of points that is less than the number needed to pay for the item in full.

9. From the list menu, select Reprice All.

   In the Net Price field, Siebel Loyalty displays the monetary price of the item minus the portion of its value that is covered by the points you entered.
10. If this item is taxable and you have Taxware installed, then from the view-level menu, choose Calculate Tax.

    The totals are updated to reflect the taxes charged on the order.
11. Click the Payments view tab and enter a form of payment for the nonpoints balance.
12. If the form of payment is a credit card, then click Authorize.
13. Click Submit.
14. To verify that the multiple payment types redemption transaction was processed as you expected:
    a. Navigate to the Loyalty Members screen and locate the member whose order you entered.
    b. Click the hyperlink in the Member Number (#) field and click the Transactions view tab.
    c. In the Transactions list, query for the Order Number (#) of the order you just processed.
    d. The Redemption Items list near the end of the view displays a record for only the number of points actually redeemed for the order.

Approving Loyalty Members' Transactions

Some transactions might require manager approval. After member service representatives submit transactions that require approval to their managers for their consideration, managers can view and approve them, and member service representatives can display the audit trail for those approvals. For information about how the managers approval limit is set up, see *Adding Employees as Loyalty Users*.

Submitting Transactions for Approval

After creating transactions, member service representatives submit certain transactions for management approval.

To submit a transaction for approval

1. Navigate to the Loyalty Members screen.
2. Click the Member Number (#) of the desired member.
3. Click the Transactions view tab.
4. In the Transactions list, find the transaction that you want to submit for approval.
5. In the Status field, change the value from In Progress to Submitted.

   Siebel Loyalty sends this transaction to the designated manager's approvals queue.

Approving or Rejecting Transactions

After member service representatives submit transactions, loyalty managers view the transactions and consider them for approval.

To approve or reject a transaction

1. Navigate to the Home Page.
2. In My Approval Inbox, identify a transaction that you want to consider for approval, and click the hyperlink in its Name field.
3. In the transaction's Status field, change the value to Approved or Rejected - Manager, as appropriate.
4. In the Pick Employee popup box, do the following:
    a. Select the employee to whom to send a notice of approval or rejection.
    b. In the Comments field, enter an explanation of or expansion on your decision.
    c. Click Send.

Viewing the Approvals for a Transaction

Member service representatives can view an approvals audit trail for each transaction to learn its history of approvals or rejections.

Some transactions can also be rejected automatically. For example, a redemption transaction is rejected if the member does not have enough points for this redemption. If a transaction is rejected because there were no points, then it does not appear in the approval history. The audit trail only shows records changed during the approval process, whose Status was changed by an employee.

To view the approvals for a transaction

1. Navigate to the Loyalty Transactions screen.
2. Identify the transaction whose approvals audit trail you want to view and click the hyperlink in its Transaction Id field.
3. Click the Transaction Approval view tab.

    The Approvals list shows a record for each approval or rejection, including the manager who made the decision, when, and a comment or explanation.

Cancelling Loyalty Members' Transactions

You can cancel different types of members' transactions. For example, you can cancel members' accrual or redemption transactions:

- If members mistakenly redeem points for a product they do not want, then 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, then they can call the help desk to have the member service representative cancel the accrual that they earned previously.

For information about canceling accrual transactions with consolidated accrual items, see *Cancelling Transactions with Consolidated Accrual Items*.

If a member cancels a redemption, then some of the points might have expired since the member redeemed them. If so, then these points are no longer available if the redemption is cancelled. These points are added back to the member's account, but the points 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.

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

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

Setting a Cancel Action for Member Attributes

The following procedure describes how to set a Cancel Action for member attributes.

To set a cancel action for member attributes

1. Navigate to the Loyalty Program Administration screen.
2. Locate the program that the attribute applies to and click its Program Id hyperlink.
3. Clear the program form's Active check box.
4. Click the Program Level Attributes view tab.
5. In the link bar of the Program Level Attributes view, click Member Attributes.
6. In the Cancel Action field, select a Cancel Action.
7. When you are finished, select the program form's Active check box.

Setting a Cancel Action for Promotion Attributes

The following procedure describes how to set a cancel action for promotion attributes.

To set a cancel action for promotion attributes

1. Navigate to the Loyalty Program Administration screen.
2. Locate the program that the attribute applies to and click its Program Id hyperlink.
3. Click the Promotions view tab.
4. Clear the program form's Active check box.
5. Locate the promotion and click its Promotion Number (#) hyperlink.
6. Click the Promotion Specific Attributes view tab.
7. In the Cancel Action field, select a Cancel Action.
8. When you are finished creating all attributes for the program, select the program form's Active check box.

To Cancel a Transaction

The following procedure describes how to cancel a transaction.

To cancel a transaction

1. Navigate to the Loyalty Members screen.

2. In the Members list, select the member and click its Member Number (#) hyperlink.
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 transaction selected, click Cancel Transaction.

   Siebel Loyalty creates a new redemption transaction which undoes the effect of the cancelled transaction. The Cancelled Transaction ID field of this new transaction displays the Transaction Id of the transaction that was cancelled.
6. In the record for the new redemption transaction, in the Status field, choose Acceptable (if your company does not require manager approval) or Submitted (if your company does not require manager approval) to process the new transaction.

   When you cancel a transaction, it debits points that are closest to expiration, as a standard redemption transaction does, but it also debits qualifying points and lifetime qualifying points.

Restricting Transactions Based on Membership Status

A membership service representative can restrict the accrual and redemption transactions, based on a Siebel Loyalty member's membership status.

To restrict transactions based on membership status

1. Navigate to the Loyalty Program Administration screen.
2. Locate the program that the restrictions applies to and click its Program Id hyperlink.
3. Clear the program form's Active check box.
4. Click the SoM Restrictions view tab.
5. Add a new record to the SoM Restrictions list, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Status	Select the membership status that the restrictions apply to. Custom member statuses can also be created. For more information about defining member statuses, see *Defining Loyalty Member Statuses*.
Restrict Accrual	If Restrict Accrual is selected, then members in this given status do not accrue points for their activities.
Restrict Redemption	If Restrict Redemption is selected, then members in this given status are not able to redeem points.

6. When you are finished creating all restrictions for the program, select the program form's Active check box.

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 must be designated to view and deal with these service requests. One or more employees must be designated to assign service requests entered through the Web site to the appropriate owner.

Member service representatives must 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 and click its Member Number (#) hyperlink.
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, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Summary	Enter a description of the service that the member requests.
Account	If the member is an account or partner, then select the company name.
Last Name	If the member is an individual or household, then select the member name.
SR Type	Choose the SR Type for the service request, for example, Incident, Known Error, Problem, or Request for Change.
Owner	By default, the employee, partner, or customer who enters the service request is the owner. If necessary, select the appropriate owner to deal with the service request. The service request is visible to the owner in My Service Requests view.

Managing Loyalty Members' Vouchers

A voucher entitles a member to a specific product or service. For example, a voucher might entitle a member to an upgrade on an airline flight or on an automobile rental.

Members are given vouchers in the following ways:

- Vouchers are automatically assigned as tier rewards. For more information, see *Defining Vouchers as Tier Rewards*.

- Vouchers are automatically assigned by promotions using the Assign Voucher action. For more information, see *Creating Actions for Loyalty Promotion Rules*.
- Vouchers are manually assigned by a member services representative, as described in this topic.

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*.

Giving Vouchers to Members

Member service representatives can give vouchers to members for a number of reasons, depending on your business model. For example, if a flight was delayed, then all members on that flight might get a voucher for an upgrade on a future flight.

To give a voucher to a member

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the member and click its Member Number (#) hyperlink.
3. Click the Vouchers view tab.
4. Add a new record to the Vouchers list, and complete the necessary fields.

   The voucher's expiration date is automatically calculated based upon the expiration rule defined in the voucher product.

Viewing Information About Members' Vouchers

Member service representatives can view information about a member's vouchers, such as information about when vouchers are valid and what discount a voucher gives. This is useful if members call to ask for information about their vouchers.

To view information about a member's vouchers

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the member you want and click its Member Number (#) hyperlink.
3. Click the Vouchers view tab.

   This view lists the members' vouchers. Some fields are described in the following table.

Field	Description
Transaction Id	Displays the transaction id of the transaction that caused this voucher to be assigned to the member.
Discount Type	Displays either Absolute Value or Percentage.
Voucher Discount Value	Displays a number specifying the quantity of the discount. For example: ○ If the Discount Type is Percentage and Voucher Discount Value is 10, then the voucher gives a discount of 10%.

Field	Description
	○ If the Discount Type is Absolute Value and the Voucher Discount Value is 20, then the voucher gives a discount of $20 (or 20 of whatever currency is used).
Transaction Item	For a Package Redemption, displays the Transaction Item that caused the voucher to be generated.
Status	Displays the status of the voucher, for example, whether it is available, already used, or expired.
Quantity	Displays the quantity of this voucher that the member has.
Start Date	Displays the date when the voucher can first be used.
Expiration Date	Displays the date after which the voucher cannot be used.
Voucher Basis	Displays the reason why the member received the voucher. Options are: ○ **Tier Reward.** The member received the voucher automatically, as a reward for changing tiers. For more information, see *Defining Vouchers as Tier Rewards*. ○ **Redemption.** The member received the voucher as a result of redeeming points or points and pay.
Amount	Displays the amount of the voucher, as it was defined in the Action view of the promotion used to assign the voucher.
Used Date	If the voucher has already been used, then this field displays the date when it was used.
Currency Exchange Date	Displays the currency exchange date of the voucher, as it was defined in the Action view of the promotion used to assign the voucher.

Using Vouchers

Vouchers are used by associating them with a transaction. Members can use two types of vouchers:

- **A specific voucher.** The member presents a voucher with a unique identifier, the voucher number.
- **A generic voucher type.** The member does not present a specific voucher number, but instead makes Siebel Loyalty use one or more vouchers of some general voucher type. For example, an airline customer can have Siebel Loyalty use three 500 mile upgrade vouchers. When the member uses a generic voucher type, Siebel Loyalty automatically uses the vouchers that are closest to expiring.

Members can use vouchers with either an accrual transaction (for example, by using upgrade vouchers on airline flight) or a redemption transaction (for example, by using vouchers to get a free hotel stay).

To use a voucher

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the member you want and click its Member Number (#) hyperlink.
3. Click the Transactions view tab.
4. Create an accrual or a redemption transaction, and enter all required fields.
5. Use the voucher in one of these ways:
   - Choose a specific voucher in the Voucher Number (#) field.
   - Specify the generic vouchers used by selecting a type in Voucher Type field and entering a quantity in the Voucher Qty fields.
6. Submit and process the transaction.
7. Click the Vouchers view tab.
8. In the Vouchers list, verify that the chosen voucher (or vouchers) has the field values shown in the following table.

Field	Value
Status	Used
Processed Date	today's date
Used Date	the transaction's transaction date

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 might 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 must 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*
- *Viewing Loyalty Members' Activities*

Entering and Submitting the Special Tier Status

When member service representatives decide that members must 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 and click its Member Number (#) hyperlink.
3. Click the Tiers view tab.
4. Select the tier record that is to be changed.
5. Click Revise.

   A new record is created with the same value in the Tier Class field as the record you selected.
6. In the new record, complete the necessary fields. Some fields are described in the following table.

Field	Description
Tier	Select the tier to which you want to promote the member.
Start Date and End Date	Displays values that are automatically calculated. If you want the tier's start and end dates to be different than these values, then these must be entered by the manager who approves the change. **Note:** If you enter a new start and end date for the tier now, then those dates are overridden by the Loyalty Engine when the tier change is approved.
Submit To	Select the manager who must approve this request or enter the manager's user name.

   The tier's status changes to Pending until the manager approves the change.

Approving or Rejecting the Manual Tier Change

The responsible manager reviews the request for the manual tier change 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. Do one of the following:
   - To approve the special status, click Approve.

     The Approval Status becomes Manual - Approved and the tier's Start Date and End Date are automatically calculated by the Loyalty Engine. If you want to enter a different Start Date or End Date, then do so now. In the Member, Tiers view, you can see that this new tier is now the active tier for this tier class.
   - To reject the special status, click Reject.

     The Approval Status becomes Manual - Rejected. In the Member, Tiers view, you can see that the old tier for this tier class is still the active tier, while the new tier displays as rejected and is inactive.

4. If an additional level of approval is required, then select the manager who must give this approval in the Submit To field.

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 feature is useful if members lose their cards.

Siebel Loyalty checks the membership card status and expiry date while processing an accrual from a point-of-sale device in order to validate the membership card.

To create a membership card manually

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the member and click its Member Number (#) hyperlink.
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	Description
Tier	Select the member's tier, which you can find in the Member form which precedes the Memberships Card list.
Expiration Date	Enter the date when the membership card expires.
Expiration Date on Card	Displays the date when the membership card expires.

Lending Points to Loyalty Members

If a member has almost enough points to qualify for a desired redemption, then some companies lend the member enough points to qualify. The member pays back the loan with future accruals.

Loyalty does not allow a member to have a negative point balance. Instead, loans are used.

Note: Loans can only give nonqualifying points.

To decide whether to lend a member points, you can perform the task described in *Viewing Loyalty Member Details*.

Setting the Maximum Loan That a Member Can Receive

Before you can approve the loan to a member, you must set the value of the maximum loan that the member can receive, and this value must be approved by an employee who is authorized to approve loans of that value. For information on how to specify the maximum loan that an employee can approve, see *Adding Employees as Loyalty Users*.

To set the maximum loan that a member can receive

1. Navigate to the Loyalty Members screen.
2. In the Loyalty Members list, click the Member Number (#) of the desired member.
3. In the More Info form, in the Max Point Loan field, enter the maximum number of points that can be loaned to this member.
4. If you are authorized to approve loans of this amount, then in the Max Point Loan Status field, select Approved.
5. If you are not authorized to approve loans of this amount, then in the Submitted field, select the manager who must approve the loan.

Lending Points to a Member

After the member's maximum loan limit has been approved, 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 and click its Member Number (#) hyperlink.
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	Description
Type	Select Accrual (automatically populated).
Sub Type	Select Loan (automatically populated).
Product/Service	Select the product that was created to represent the loan. This must be a product with the name *Loan* or a similar name.
Points	Enter the number of points to be loaned.
Point Type	Select the point type.

Field	Description
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 can change this value, if, for example, the manager is on vacation.
Status	Select Submitted to submit the loan for approval.

5. The manager changes the loan transaction's status to Acceptable and clicks the Process button.

   The member's available points balance is increased by the loan amount.

Repaying the Loan

When a member earns points in the future, those points are used to pay back the loan.

To set up automatic repayment of loans, *Setting Up Points Loan Repayment Workflow*.

For manual repayment of the loan, follow this procedure.

To manually repay a loan

1. With the record for the loan selected in the Loans list, scroll down to see the Repayments list.
2. Add a new record to the repayments list, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Product/Service	Select a product.
Points	Enter the number of points to be repaid.
Point Type	Select the point type. This must be the same type used in the loan.
Submit To	Select the manager who must approve this request.
Status	Displays In Progress.

3. Click the repayment's Transaction ID field.
4. Change the transaction's status to Submitted to submit the transaction for approval.
5. The manager approves the transaction by changing its status to Acceptable.
6. Click Process to process the transaction.

Redeeming the Loan

The loaned points remain available to the member until the member uses these points as part of a redemption. When the member redeems the loan by making a purchase, the points are debited from the member's account.

Restricting Loyalty Point Transfers

In some cases, Loyalty companies might want to restrict point transfers between members.

You can enter restrictions for each:

- Transferor or Transferee
- Point Type
- Membership Type
- Tier in Dominant Tier Structure Combination
    - Minimum Transaction QTY
    - Maximum Transaction QTY
    - Annual QTY Limit

Note: There cannot be more than one line with the same Limit On, Point Type, Membership Type and Dominant Tier combination for one Siebel Loyalty program.

To restrict point transfers

1. Navigate to the Loyalty Program Administration screen.
2. Locate the program and click its Program Id hyperlink.
3. Click the Points Transfer Setup tab.
4. Add a new record to the Point Transfer Setup list and complete the necessary fields. Some fields are described in the following table.

Field	Description
Limits on	Select either Transferor or Transferee.
Point Type	Select Point Type.
Membership Type	Select the Membership Type. Choices include: - Account - Household - Individual - Partner

Field	Description
Tier	Enter the Tier.
Minimum Transaction Quantity	Enter the Minimum Transaction Quantity. This number cannot be greater than the Maximum Transaction Quantity.
Maximum Transaction Quantity	Enter the Maximum Transaction Quantity. This number cannot be less than the Minimum Transaction Quantity.
Transfer Period Limit	Enter the total number of points a user can transfer in a given calendar year. The Transfer Start Date attribute at the program level determines the time the start date for transfer in the calendar year. The Transfer Start Date, by default, is same as the program start date.

Restricting Loyalty Point Purchases

The purchase of points could have certain limitations, which could differ from member to member based on each member's Dominant Tier and membership type. For example, a Platinum Tier member might be able to purchase more points in a single transaction (Transaction limits) or even over a period of time (Period Limits), as compared to a Bronze member.

To restrict point purchases

1. Navigate to the Loyalty Program Administration screen.
2. Locate the program and click its Program Id hyperlink.
3. Click the Point Purchase Setup tab.
4. Add a new record to the Point Purchase Setup list, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Point Type	Select Point Type.
Membership Type	Select the Membership Type. Choices include: o Account o Household o Individual o Partner
Tier	Enter the Tier.

Field	Description
Minimum Transaction Quantity	Enter the Minimum Transaction Quantity.
Maximum Transaction Quantity	Enter the Maximum Transaction Quantity.
Purchase Period Limit	Enter the total number of points a user can purchase in a given period of time. This can be based on the Purchase Start Date attribute at the program level.

Merging Loyalty Program Members

You can merge one or more Loyalty member accounts into another member account.

For example, a merge can be useful if someone enrolled in the same Program twice by mistake and accrued points in both memberships. You can use a merge to combine these two memberships into one.

A merge can also be useful if someone enrolled in a Program as a household, but other people from the same household enrolled in the same program as individuals. You can use a merge to combine the household and individual members as a single household member.

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

- **Remaining Member.** The member that remains active after the merge. You must select this member last when you do the multiselect before the merge.
- **Deactivated Members.** The members that are deactivated after the merge. These are the members that you do not select last before the merge.

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

- All the members must be enrolled in the same program.
- If the remaining (active) member is an individual, then all deactivated members must be individuals.
- If the remaining (active) member is an account or household, then the deactivated members can be of any type.

Results of the Member Merge

This topic describes how data from all the records are merged into the remaining (active) record when you perform the merge:

- **Points.** Siebel Loyalty adds up the Available, Lifetime and Qualifying Points of all members, and it gives the total to the remaining member.
- **Last Transaction.** Siebel Loyalty compares the dates when the last transaction was processed for all members, and it uses the latest date as the last transaction of the remaining member.
- **Contact Campaigns, Activities, Transactions, Vouchers, Service Requests, Statements, and Membership Cards.** Siebel Loyalty gives the Contact Campaigns, Activities, Transactions, Vouchers, Service Requests, Statements, and Membership Cards of all the members to the remaining member. Siebel Loyalty combines

the transaction history of all the members into a single transaction history and combines the service request history of all the members into a single service request history.

- **Tiers.** Siebel Loyalty allows the remaining member to retain the highest tier or the two tiers. In addition, the member's tier is recalculated based upon the new combined point total at the next regularly scheduled tier recalculation.
- **Tier History.** Siebel Loyalty gives the combined tier histories of all the members to the remaining member. This means that the tier history shows overlapping tiers in the same tier class for the same date.
- **Contact-Level Information.** For information stored at the Contact level, such as the Travel Profile:
  - If the same contact was used for all memberships, then Siebel Loyalty keeps the remaining member's information.
  - If different contacts were used and these are individual memberships, then Siebel Loyalty keeps the remaining member's information.
  - If different contacts were used and these are household or account memberships or an individual membership being merged into an account or household membership, then Siebel Loyalty adds all contacts to the remaining membership. The user decides which of these contacts to keep.
- **Enrolled Promotions.** The enrolled promotions of all members are combined.

Member Attributes

During the member merge process, member attributes are merged but member field attributes are not. By default, the member merge has the following results for member attributes:

- If member attributes cannot be added together, then Siebel Loyalty keeps the attribute value of the remaining member. For example, this applies to member attributes with values such as yes or no.
- If member attributes can be added together, for example, numeric totals, then they are added.

You can specify how member attributes are added by selecting an option in the Merge Action field of the Loyalty Program Administration screen, Program Level Attributes, Member Attributes view. For example:

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

The values that are available in the Merge Action field depend on the data type of the attributes, as shown in the following table.

Data Type	Values for Merge Action Field
Date	**Earliest.** Replaces date with the earliest date for the attribute. **Latest.** Replaces date with the latest date for the attribute. **Standard.** Keeps the date for the attribute that the remaining member had before the merge.
Integer, Number	**Max.** Replaces number with the maximum number for the attribute. **Min.** Replaces number with the minimum number for the attribute.

Data Type	Values for Merge Action Field
	Sum. Replaces number with the sum of the numbers for the attribute for all members. **Standard.** Keeps the number for the attribute that the remaining member had before the merge.
String	**Standard.** Keeps the value for the string that the remaining member had before the merge.

Changing the Results of the Merge by Setting User Properties

The following results of the merge can be changed by using Siebel Tools to change the user properties for the LOY Member business component:

- **Delete Merged Tiers.** If this user property is set to Y, then the remaining member retains the highest tier of the two tiers. If it is set to N, then the remaining member keeps all tiers of all merged members.
- **Delete Merged Contacts.** If this user property is set to Y, then the remaining member keeps only the contacts that the remaining member had before the merge. If it is set to N, then the remaining member keeps all Contact records of all merged members.
- **Delete Non-Qualified Merged Promotions.** If this user property is set to Y, then the remaining member keeps only the promotions that the remaining member was enrolled in before the merge. If it is set to N, then the remaining member keeps all promotions of all merged members.

Performing the Member Merge

Use this procedure to perform the member merge.

To merge a member with another member

1. Navigate to the Loyalty Members screen.
2. In the Members list, multiselect all the records you want to merge, while holding down the Shift key.

   > **Note:** Be sure to select the deactivated members first and the remaining (active) member last. Siebel Loyalty merges all the selected records into the last-selected record.

3. In the application-level menu, choose Edit, Merge Records.
4. In the Merge Records confirmation message window, make sure the displayed Member Number (#) is that of the intended remaining member, and click OK.

   All the merged members' points, activities, vouchers, service requests, promotions, member attributes, and referrals are added to the remaining member's existing items. Member field attributes are not merged.

   > **Note:** Deactivated members' records are retained with the Status of Merged.

Generating, Viewing, and 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 can receive statements by mail or by email, depending on their communication preference.

You can generate statements manually, or you can create a workflow that generates them automatically based on the Statement Frequency field of the Tier record, described in *Defining Tier Classes and Tiers*. 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.

Siebel Loyalty stores a record of all statements that have been sent to members. If a member calls with a question about the statement, then 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.

Note: Transactions are included based upon their Processed On Date, not their Transaction Date. For example, if a transaction occurred on Feb. 28 but is not processed until March 2, then this transaction is included in a statement that covers March 1 to March 31, because its Processed On date falls within the statement's Start and End Dates.

Generating a Statement

The following procedure describes how to generate a statement.

To generate a statement

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the member and click its Member Number (#) hyperlink.
3. In the Member form, click Generate Statement.
4. In the dialog box, select the statement type, enter the start date and end date for the statement, and click Submit.

   An electronic record of the statement is created.

Viewing Statement Information

The following procedure describes how to view statement information for a member.

To view statement information for a member

1. Navigate to the Loyalty Members screen.
2. In the Members list, select the member and click its Member Number (#) hyperlink.
3. Click the Statements view tab.
4. In the Statements list, click the Statement Number (#) hyperlink to view details about that statement:
   - The Statement form and More Info form include general information about the statement. Some fields are described in the following table.

Field	Description
Start Date	Displays the start date of the statement.
End Date	Displays the end date of the statement.

Field	Description
Available PT 1	Displays the balance of point-type-1 points available at the end date of the statement.
PT 1 Qual This Statement	Displays the number of point-type-1 qualifying points received during the period of the statement.
PT 1 Non-Qual This Statement	Displays the number of point-type-1 nonqualifying points received during the period of the statement.
PT 1 Qual TC1 This Period	Displays the balance of point-type-1 points at the end of the period of the statement that are qualifying points for Tier Class 1.
PT 1 Needed TC1	Displays the number of point-type-1 points that are needed to reach the next tier in Tier Class 1.
Next Tier TC1	Displays the next tier that this member can reach in Tier Class 1.

- The Memberships Card view lists all the membership cards for this member. For more information about membership cards, see *Creating a Loyalty Membership Card Manually*.
- The Transactions view lists all the member's transactions for the period of the statement. For information about transaction fields, see *Entering Loyalty Members' Orders*.
- The Vouchers Outstanding view lists any vouchers that are available to the member. For more information, see *Managing Loyalty Members' Vouchers*.
- The Vouchers Used view lists any vouchers that the member used during the statement period. For more information, see *Managing Loyalty Members' Vouchers*.
- The Frequency Bonuses view lists the points that a member received as the result of a frequency promotion. Some fields are described in the following table. These point accruals do appear in the Transactions view because they are not associated with one individual transaction, they are the result of several related transactions. For example, if a promotion gave a member a 1,000-point bonus after completing three SFO - BOS flights, then each flight is listed as a transaction in the Statement, Transactions view, and the 1,000 points is listed in the Statement, Frequency Bonuses view. For more information about frequency bonuses, see *Types of Loyalty Promotions*.

Field	Description
Point Type	Displays the point type needed to qualify for this bonus.
Qual	If this check box is checked, then only qualifying points count toward the bonus. If it is not checked, then only nonqualifying points count toward the bonus.

Field	Description
Number (#) of Points	Displays the number of points needed to qualify for this bonus.
Expiration Date	Displays the date when the bonus offer expires.
Process Date	If the member has qualified for the bonus, then this field displays the date when Siebel Loyalty gave the member the bonus.

Printing a Statement

The following procedure describes how to print a statement.

To print a statement

1. Navigate to the Loyalty Statements screen.
2. In the Statements list, query for the desired member.
3. Click the Statement Number (#) of the statement you want to print.
4. Click the Reports icon, and the Generate Report pane is displayed.
5. Complete the fields, then click Submit to generate the report.
6. Click My Reports to navigate to the Reports view of the BI Publisher Reports screen, then drill down on the relevant Report Name field in the Reports view to display the report.

   You can now print the report. For additional information on generating and printing reports, see *Siebel Fundamentals Guide* .

Bulk Loyalty Membership Administration

You can manually administer changes that apply to multiple Loyalty members. Bulk membership administration is described in the following topics:

- *About Bulk Loyalty Membership Administration*
- *Administering Bulk Promotion Enrollment*
- *Administering Bulk Tier Changes*
- *Administering Bulk Point Updates*
- *Administering Bulk Status of Membership Changes*
- *Administering Bulk Actions Using Analytics Segments*
- *Viewing Bulk Action History*
- *Administering Bulk Accruals*
- *About Importing Loyalty Members and Transactions Using Siebel EIM*

About Bulk Loyalty Membership Administration

For bulk membership administration, the input file can be formatted as a flat file, an XML file or a CSV file. This input file is read into a Siebel property set using Siebel EAI. This property set is then broken down into smaller work units, each typically containing about a hundred records. Each work unit is then passed as input to the method ProcessWorkUnit(). This method delegates processing to the Siebel Workflow described in *LOY Bulk Member Admin Process Workflow*.

The work units are processed asynchronously, making use of available CPU capacity, which allows the user to continue using Siebel Loyalty during processing. The work units are processed in parallel, improving performance.

Enabling Bulk Loyalty Membership Administration

To enable bulk Loyalty membership administration, you must activate the server component group named Systemaux, which contains the component File System Manager, used for bulk membership administration.

To enable bulk Loyalty membership administration

1. Navigate to the Administration - Server screen, then the Servers and the Component Groups view.
2. In the Component Groups list, select Systemaux.
3. Click the Startup button.

Controlling the Size of Work Units

The number of records in each work unit is controlled by the business service property named Work Unit Size which is under the LOY Member Admin Service. Using Oracle's Siebel Tools, you can set the value of this user property to any quantity up to 100.

Use a larger work unit size if you typically process large numbers of records. For example, if you typically process 10,000 records, then a work unit size of 10 is too low, because you need 1,000 child workflow instances to process all the records, which would slow performance. As a general rule, use a work unit size of 100 if the number of records processed is high, more than about 10,000, but lower the work unit size to 50 if the number of records processed is about 1,000.

Configuring a Log Directory for Work Unit Processing

You must configure a directory to store the log files generated during work unit processing. The following procedure describes this task.

To configure a log directory for work unit processing

1. Create a directory in the location where you want to store work unit log files and assign it the name `Logfiles`.
2. In Siebel Tools, update the Logfile user property of the LOY Member Admin Service business service to specify the full path of the `Logfiles` directory you created.
3. Deliver your changes to the Siebel runtime repository.

Administering Bulk Promotion Enrollment

Bulk promotion enrollment enables you to enroll a large number of members in a promotion and to reward members for this enrollment.

Bulk promotion enrollment is useful because:

- It enables administrators to enroll large volumes of members in a promotion instead of using the product interface to enroll one member at a time.
- It enables administrators to manage member promotion enrollment if there is a disruption of service, for example because the call center is not operating or the Siebel Loyalty user interface is not available.
- It enables administrators to manage member promotion enrollment for privileged members directly, without going through the member service representative.

Here is a case where it is useful to enroll new members in promotions using a bulk process rather than enrolling each new member manually. As part of a marketing campaign, an airline has segmented Loyalty members based on demographics, and it wants to enroll all Platinum members with certain demographic characteristics in a month-long reward promotion to introduce a new route that it is flying. It has created the promotion, and it must enroll over 2,000 members in it. To enroll this large number of members in the promotion, the administrator:

- Creates an accrual promotion that requires enrollment.
- Runs a bulk promotion enrollment to enroll all the members in the accrual promotion.

Create the promotion that you want to enroll members in, before you run the bulk enrollment.

To administer a bulk promotion enrollment

1. Navigate to the Loyalty Program Administration screen.
2. In the Programs list, select a program and click its Program Id hyperlink.
3. Click the Bulk Membership Administration view tab.
4. Add a new Bulk Membership Administration record, and complete the necessary fields. Some fields are shown in the following table.

Field	Value
Action Type	Promotion Enrolment.
Reason Code	Select the reason for this bulk enrollment.
Input Format	Select the format of the file that lists the members to enroll. Options are: ○ **CSV.** Member numbers of the members being enrolled must be in a file with comma-separated values. ○ **XLS.** Member numbers of the members being enrolled must be in a Microsoft Excel spreadsheet. ○ **Analytics Segment.** Members enrolled are specified by an analytics segment defined in Siebel Marketing.
Promotion	Select the promotion that these members will be enrolled in.
Incentive Choice	If there are incentives for enrolling in this promotion, then select the incentive that these bulk enrollees receive.

5. To run bulk membership enrollment and enroll the members you specified, click Run.

Administering Bulk Tier Changes

Bulk tier change administration involves manually managing Loyalty members' Tiers by selecting a certain group of members and changing their Tier at the same time.

Before the member service representative can make bulk tier changes, a loyalty administrator must create a points adjustment product. For more information about setting up products, see *Siebel Product Administration Guide* .

Once the purchase points adjustment product is created, a loyalty administrator must also associate the Manual Credit and Manual Debit products with a service. For more information, see *Setting Prices for Member Services*.

To administer bulk tier changes

1. Navigate to Loyalty Program Administration.
2. In the Programs list, select a program and click its Program Id hyperlink.
3. Click the Bulk Membership Administration view tab.
4. Add one or more new records to the Bulk Administration list and complete the necessary fields. Some fields are described in the following table.

Field	Description
Action	Select Change Tier.
New Tier	Select the tier to be assigned to the list of members.
Tier Start Date	Enter the start date of the tier.
Tier End Date	Enter the end date of the tier.
Input Format	Select the format to input the list of members. Options are: XML, CSV, or Analytics Segment.
File	If you selected XML or CSV as the input format, then enter the path and file of the member list. This field is inactive is you selected Analytics Segment as the input format.
Segment	If you selected Analytics Segment as the input format, then select the segment to be used. This field contains all the segments created in Siebel Marketing. For more information, see *Administering Bulk Actions Using Analytics Segments*.
Reason Code	Select a reason for making the adjustment.

Field	Description

5. Click Process.

Administering Bulk Point Updates

Bulk point administration involves manually managing Loyalty members' points by selecting a certain group of members and either debiting or crediting their point balances.

Before administering bulk point updates, make sure the following requirements are in place:

- The Admin - Manual Credit promotion and the Admin - Manual Debit promotion exist.
- You have created a point adjustment product with a Type of Loyalty Service.
- You have associated the product with the program for which you want to administer bulk point updates as a service product in the Service Product Association view for the program.

Administering Bulk Point Updates

The following procedure describes how to administer bulk point updates.

To administer bulk point updates

1. Navigate to Loyalty Program Administration.
2. In the Programs list, select a program and click its Program Id hyperlink.
3. Click the Bulk Membership Administration view tab.
4. Add one or more new records to the Bulk Administration list and complete the necessary fields. Some fields are described in the following table.

Field	Description
Action	Select Adjust Point.
Adjustment Type	Select the adjustment type. Options are: o Credit o Debit
Point Type	Select the point type.
Quantity	Enter the number of points that have to be credited or debited to member's accounts.
Input Format	Select the format to input the list of members. Options are: XML, CSV, or Analytics Segment.

Field	Description
File	If you selected XML or CSV as the input format, then enter the pathfile of the member list. This field is inactive is you selected Analytics Segment as the input format.
Segment	If you selected Analytics Segment as the input format, then select the segment to be used. This field contains all the segments created in Siebel Marketing. For more information, see *Administering Bulk Actions Using Analytics Segments*.
Reason Code	Select a reason for making the adjustment.

5. Click Process.

Administering Bulk Status of Membership Changes

Bulk status of membership administration involves changing the status of membership for a group of members who are selected based on given criteria. For example, a loyalty manager could select a group of members who have not had any accrual activity in the last year and can set their status to Dormant.

To administer bulk status of membership changes

1. Navigate to Loyalty Program Administration.
2. In the Programs list, select a program and click its Program Id hyperlink.
3. Click the Bulk Membership Administration view tab.
4. Add a one or more new records to Bulk Administration list and complete the necessary fields. Some fields are described in the following table.

Field	Description
Action	Select Change Status of Membership.
New Status	Select the new status.
Input Format	Select the format to input the list of members. Options are: XML, CSV, or Analytics Segment.
File	If you selected XML or CSV as the input format, then enter the pathfile of the member list. This field is inactive is you selected Analytics Segment as the input format.

Field	Description
Segment	If you selected Analytics Segment as the input format, then select the segment to be used. This field contains all the segments created in Siebel Marketing. For more information, see *Administering Bulk Actions Using Analytics Segments*.
Reason Code	Select a reason for the adjustment.
Status	Select New.

5. Click Process.

Administering Bulk Actions Using Analytics Segments

It is possible to use analytics segments to perform bulk member administration actions, if you have licensed the Segment Builder view in Siebel Marketing and Oracle Business Intelligence Enterprise Edition. For more information about Siebel Marketing, see *Siebel Marketing User Guide* .

For more information about Oracle Business Intelligence Enterprise Edition, which was formerly known as Siebel Business Analytics, see the relevant documentation for the version of the software that you are running:

- For versions earlier than 10.1.3.2, see Oracle's Siebel Business Analytics Platform documentation.
- For versions 10.1.3.2 or later, see the Oracle Business Intelligence Enterprise Edition documentation.

This documentation is on Oracle Technology Network.

To administer bulk actions using analytics segments

1. Populate the segment data needed for bulk member administration as follows:
   a. Create Segments in the Segment Builder view based on Loyalty Member data.
   b. Populate the staging table S_LOY_OLAPSTG with the member data in a segment for a given Loyalty Program.
   c. Modify the workflow LOY Bulk Action Process so it refers to the segment ID as a Process property. Then activate and redeploy the workflow.

      This segment Id is the CALL_LST_ID in the S_LOY_OLAPSTG staging table.
2. Optionally, you can also specify the Staging table business component name as a user property in the Generic Import Business Service by enabling the Segment field in the business component and applet with the segment lookup based on the S_LOY_OLAPSTG table.

   You can do this if you want to configure some other business component on the existing S_LOY_PLAPSTG table.
3. Administer the bulk transaction, as you administer the other types bulk transactions:

a. Navigate to Loyalty Program Administration.
b. In the Programs list, select a program and click its Program Id hyperlink.
c. Click the Bulk Membership Administration view tab.
d. Click New to add one or more new records to Bulk Administration list.
e. Complete the necessary fields in each record:
   - In the Input format field, select Analytics Segment. This option refers to the Loyalty Member data derived using Oracle Business Intelligence Enterprise Edition.
   - In the other fields, enter the appropriate information, which depends on the type of bulk transaction you are performing, as described in the procedures about different types of bulk transactions earlier in this topic.
f. Click Process.

Viewing Bulk Action History

After administering bulk transactions, you can view the history of how these transactions were processed. The history view is hierarchical: each bulk transaction has a plus (+) or minus (-) icon next to it, which you can click to view or to hide all of the work units used to perform that transaction. For more information about work units, see *About Bulk Loyalty Membership Administration*.

This history enables you to see how many records were processed and how many were rejected in the bulk action.

If records were rejected in the bulk action, then click the error log generated for each work unit to see why they were rejected. Modify the records to correct the cause of the rejection. Then resubmit those records in a new bulk action.

To view bulk action history

1. Navigate to the Loyalty Program Administration view.
2. Click the Program Id field of the program that you want.
3. Click the Bulk Member Administration view tab.
4. Click the Bulk Action History link.

Administering Bulk Accruals

If you import transactions into Siebel Loyalty, then they do not go through the usual transaction validations. Therefore, you must administer bulk accruals as follows:

- First import all the transactions into the staging table.
- Schedule the LOY Bulk Import Accrual process workflow to run as a background process.
- The workflow validates the transactions. The status of transactions that pass the validation remain as In Progress. The status of transactions that do not pass the validation are set to Failed.
- All the transactions that passed the validation can be imported into the EIM transaction table. From there, they are imported to loyalty tables.
- All the failed transactions can be sent to the appropriate partners for validation.

About Importing Loyalty Members and Transactions Using Siebel EIM

You can use Siebel Enterprise Integration Manager (EIM) to perform bulk imports of loyalty members and transactions into the Siebel database from other data sources. Detailed information on using Siebel EIM to import data into the Siebel database is provided in *Siebel Enterprise Integration Manager Administration Guide* . This topic outlines information that is specific to importing loyalty member data into the Siebel database.

About Assigning Loyalty Server Keys

The recommended method of bulk importing loyalty members and transactions into the Siebel database is to import the data into the EIM tables EIM_LOY_MEMBER and EIM_LOY_TXN, then process transaction data with the Loyalty Batch Engine to make sure that members' balances and point blocks are updated appropriately.

To enable the imported loyalty member transactions to be processed by the Loyalty Batch Engine, each imported member must be allocated a valid server key number. You can specify a server key number for each member to be imported in the MEMBER_MEM_KEY_NUM field in the EIM table EIM_LOY_MEMBER. For performance reasons, it is important that the server keys are distributed evenly across the imported members, so do not assign the same key to all members. For detailed information on how to assign server keys, see *Setting Up Server Keys for Siebel Loyalty*.

> **Note:** When a new loyalty member is added to the Siebel Loyalty application through the user interface, Siebel Loyalty automatically assigns a key to the new member and updates the informational field, Number (#) of Members Assigned, in the Server Key Map list. Be aware that the Number (#) of Members Assigned field is not updated for members imported into Siebel Loyalty using EIM. This limitation does not affect the correct functioning of the Siebel Loyalty application.

Administering Batch Enrollment

You can process batches of the following transaction types:

- **New membership applications.** You can process a batch of new membership applications. For example, Alpha Retail is in partnership with Beta Cards, and wants to offer membership in the Alpha Retail loyalty program to all Beta Cards members. Beta Cards sends an XML (extensible markup language) file of its electronic records to Alpha Retail, and Alpha Retail processes the enrollment.
- **Membership data updates.** You can process a batch of updates to existing records. For example, Alpha Retail typically receives many membership applications on hand-written paper forms. Each form has a preprinted membership number. Alpha Retail creates memberships with just a membership number, and no data, before it distributes the application forms. When Alpha Retail receives the handwritten application forms, it uses an ICR (intelligent character recognition) system to convert the handwritten information to electronic format, and batch processes the electronic applications.
- **Membership renewals.** You can process a batch of renewals for memberships that are about to expire. For example, Alpha Retail emails membership renewal notices to all existing members whose membership expire in 30 days. The email states their current point balances, and lists renewal fees with pricing options in Points, Pay and Points plus (+) Pay. A renewal request form is attached to the email. Members print the renewal request form and hand-write their choices, then mail the completed form back to Alpha Retail. Alpha Retail uses an

ICR (intelligent character recognition) system to convert the handwritten information to electronic format, and batch processes the electronic renewals.

For more information on batch processing new membership applications, membership data updates, and membership renewals, see the topic about the Loyalty Member Service Web service in *Siebel CRM Web Services Reference* .

7 Setting Up Siebel Loyalty Redemptions

Setting Up Siebel Loyalty Redemptions

This chapter discusses how to set up Siebel Loyalty redemptions. It includes the following topics:

- *About Siebel Loyalty Redemptions*
- *About Redemption Pricing*
- *Process of Setting Up Airline Flight Redemptions*
- *About Nonflight Redemptions*
- *Process of Setting Up Nonflight Redemptions*
- *Sequence for Redeeming a Tangible Product Through a Web Store*
- *About Electronic Vouchers*
- *Sequence for Redeeming Electronic Vouchers*
- *Example of Setting Up Redemption Pricing Using Base Redemption Promotions*
- *Example of Creating Promotions to Assign Values to Vouchers*
- *Partner Pricing for Loyalty Redemptions*
- *Redemption Packages*
- *Redemption Loans*
- *Points-To-Pay Conversion*
- *Bidding for a Redemption Product*
- *Batch Redemption Process*
- *Addressing Concurrent Redemption Transactions*
- *Methods to Calculate Loyalty Redemption Price*

About Siebel Loyalty Redemptions

Customer loyalty programs are designed to recognize and reward frequent users of a company's products and brands, or those of the company's partners. A Rewards Program can offer its members a number of opportunities to accrue and apply points toward redemption awards.

Using Siebel Loyalty, companies can develop and implement loyalty programs and redemption awards that allow them to remain competitive and differentiated in the market place. These redemption opportunities increase customer satisfaction, while allowing the company to manage the liability associated with member points accruals.

Siebel Loyalty provides Web services application programming interfaces (APIs) that support redemption through third-party systems. For information on these APIs, including what the APIs do along with details of their input and output arguments, see *Siebel CRM Web Services Reference* .

Loyalty programs can help increase customer satisfaction and brand loyalty by:

- Providing innovative redemption offerings which meet the program member's needs and which match the evolving trends in the loyalty marketplace.
- Offering redemption products which a member can redeem using a lower number of points than competitive loyalty programs.
- Offering the points-plus-pay pricing option.

A typical Siebel Loyalty redemption process includes the following steps:

1. The program member requests a redemption.

   The member chooses an available redemption product from the catalog and makes a redemption request with the Loyalty operation, or by using a self-service process.
2. Siebel Loyalty:

   a. Checks the members eligibility in the program.

      Siebel Loyalty checks the member's eligibility for the redemption, based on the member's current membership status. For example, if the member has a pending payment to be made to loyalty program operations from an earlier transaction, then the member's current status is pending payment, and the member is ineligible for a redemption.
   b. Checks the availability of the product.

      For an airline redemption, Siebel Loyalty checks whether or not a redemption seat is available on any partner airline flying from the selected origin city to the destination city in the reservations inventory (RES system). For a nonflight redemption, Siebel Loyalty might bypass this check. Note that checking for the availability of a seat is done outside Siebel Loyalty.
3. The member selects the product for redemption.

   The member selects the redemption product, for example, an airline flight from Sydney to San Francisco or a five-star hotel stay in Paris. Multiple products can be redeemed in one redemption request.
4. Siebel Loyalty quotes a price for the redemption product.

   Siebel Loyalty provides the member with the price in points, or points-plus-pay (in a currency), for redeeming the selected product.

   You can convert points to cash payment, or obtain a loan to redeem the product in the redemption request. There can also be multiple point types in the same redemption request.
5. The member accepts the quote.

   The member accepts the quotation in points or points-plus-pay.
6. Siebel Loyalty does the following:

   a. (Optional) Checks the member's credit.

      After the member accepts the redemption quotation, Siebel Loyalty optionally performs a credit check to ensure the member has a sufficient points to undertake the redemption. As some loyalty programs allow members to create a redemption request and process the request at a later time, this step is optional.
   b. Creates the redemption request.

      Siebel Loyalty creates the redemption request to be retrieved at a later time.
   c. Checks the member's credit (mandatory).

After creating or retrieving a redemption request, Siebel Loyalty performs a mandatory credit check to ensure the member has sufficient points to undertake the redemption.

d. Invokes a credit card payment.

   If a currency payment is required, then Siebel Loyalty invokes a credit card payment through a payment gateway and collects the payment.

e. Debits the member's points balance.

   Siebel Loyalty debits the required number of points from the member's point balance based on the quotation accepted by the member in Step 5.

7. In some cases, the member redeems points to receive a voucher that can be used with a partner at a future date to use nonflight products. For example, the member might get a voucher that can be used for a one-day car rental or for a one-night stay at a hotel. The following steps are optional and only occur when the member receives a voucher:

   a. Siebel Loyalty generates and issues a voucher.

      In some cases, Siebel Loyalty generates a voucher with a unique voucher number and an expiry date. If a voucher is required, then Siebel Loyalty initiates an outbound process to issue the generated voucher to the member for a future-dated nonair redemption. If the process involves an air redemption, then the loyalty program issues an electronic voucher or a redemption log number to the partner or travel agent, who in turn, issues an airline ticket to the member.

   b. If required, you can use an application such as Oracle Business Intelligence or another third-party application to calculate the price to pay to the partner for the redemption product.

   c. The member redeems the voucher.

      The member presents the voucher to the partner to use the partner product. If this redemption is for an air redemption or for nonair products ordered from a catalog, then this step might not be relevant.

   d. The partner:

      - Validates the voucher. The partner validates the redemption voucher for a valid membership, valid product details (for example, duration), expiry date, and so on, with the loyalty program operations. This step enables loyalty program operations to flag the voucher as Reserved, and prevents the member from using the same voucher with another partner. A receipt number can be issued to guarantee the use of the voucher to the partner.
      - Provides the product or service. The partner provides the product or service based on the redemption voucher presented by the member. For airline partners, the intermediary or internal partner first issues a ticket for the itinerary, and then the member uses the same voucher for flight redemption.
      - Sends an invoice for payment. After the customer uses the voucher, the partner sends an invoice to Loyalty Program Operations to claim the payment.

   e. The Loyalty finance department pays the partner. The loyalty program's finance department reconciles the invoice with the used voucher and pays the partner the computed payable amount.

      Vouchers can be used differently for flight and nonflight redemptions. For more information about vouchers, see *Points-To-Pay Conversion*.

Real-Time Processing of Redemptions

Siebel Loyalty implements the ProcessRealTimeRedemption method of the LOY Redemption Web service to reduce the processing time of real-time redemption transactions. The ProcessRealTimeRedemption method performs the following tasks in the redemption process as separate steps:

1. Checks the member's credit and displays a message about the status of the transaction.

   The ProcessRealTimeRedemption method:

   - Performs the member credit check, taking into account any redemptions that are pending for the member

     > **Note:** If the member does not have sufficient points for the redemption transaction but is eligible for a loan, then the ProcessRealTimeRedemption method processes a loan transaction for the member, then returns a status of Successful for the redemption transaction.

   - Displays a message to the member confirming that the redemption transaction was successful, and provides a transaction number
2. Processes the redemption transaction and debits the member's points balance.

Siebel Loyalty updates members about the status of their redemption request and only then completes the transaction by debiting the points from members. By performing each task separately, the time members wait for a response to their request is reduced, as is the total time taken to process the request. For more information on the ProcessRealTimeRedemption method, see *Siebel CRM Web Services Reference* .

About Redemption Pricing

Members redeem points to obtain products offered by program partners for redemption. Products include such items as airline flights, hotel bookings, car rentals, or upgrades, for example, upgrades to first class on existing travel tickets, and so on.

You can define redemption pricing in two ways:

- *About Pricing Using Redemption Rules*
- *About Pricing Using Base Redemption Promotions*

About Pricing Using Redemption Rules

The price for a redemption is usually calculated using redemption rules. Redemption pricing can use the following views:

- **Points.** It is not common to define pricing for airline redemptions using the Points view, because it requires you to create a separate product for each pair of cities, and define the pricing separately for each of those products. It is common to define pricing for tangible products or services using the Points view. For example, you might use the following pricing:
  - 50,000 points for a rental car in London for one day.
  - 70,000 points for one night at a specific hotel in Tokyo.

- **Points by zone.** Some of the frequent flyer programs price air awards based on the zones derived from the origin city and destination city. You create generic flight products; for example, there might be products for an economy class flight, a business class flight, and a first class flight. Then you create rules that determine different prices for these products depending on origin and destination city. For example:
  - 30,000 points for an economy class ticket from New York to Chicago
  - 80,000 points for an economy class ticket from New York to Paris.
  - 120,000 for a first class ticket from New York to Paris.
- **Points by distance.** Other programs price their air awards based on zones derived from the flight distance between origin and destination cities for one or more segments in the itinerary. You create generic flight products, then you create the following rules that determine different prices for these products depending on the distance travelled:
  - 25,000 points for an economy class ticket from 800 to 1,200 miles.
  - 75,000 points for an economy class ticket from 5,000 to 7,000 miles.
  - 110,000 for a first class ticket from 5,000 to 7,000 miles.

Airlines typically provide an option to program members to obtain a redemption award by paying in points plus pay (currency). Members can use this option if they do not have a sufficient point balance for the redemption. For example, if redemption tickets for the member and the member's spouse require 100,000 points while member's current points balance is only 85,000 points. Siebel Loyalty programs allow you to set up multiple price options for the same redemption ticket. For example:

- 100,000 points only
- 80,000 points plus US$100
- 60,000 points plus 200 Euros

For an airline redemption, the activities can be grouped together, although the process of grouping the activities does not take place within Siebel Loyalty. Siebel Loyalty handles grouped activities by storing the activities along with their parent activity to create a transaction. If it cannot calculate the travel distance from the parent transaction, then Siebel Loyalty attempts to calculate the distance from the constituent activities if they are present.

About Pricing Using Base Redemption Promotions

Base redemption promotions give you a way to create redemptions that cannot be handled using redemption rules:

- Redemption rules, which are used for normal redemptions, update redemption prices based on the pricing setup done at the product level.
- Base redemption promotions can be used to create redemption pricing that also takes into account external factors, such as the load factor, the number of days redeemed before the flight date, or the tier level of the customer.

Here is an example of when base redemption promotions are useful: An airline wants to create a redemption price for flights that gives its platinum members a discount price of 10% less than the redemption price that other members pay and that gives a further 3% discount if the redemption is for flights during the month of October.

When you create the product, you must determine whether the product's redemption price is calculated using the price that is set up at the product level or using a base redemption promotion. If you choose Base Promotion as the product's

pricing method, then Siebel Loyalty ignores the price set at the product level and instead it uses the price set by the base redemption promotion.

To set up redemption promotions, perform the following tasks:

1. Create the redemption product. When you associate the redemption product with a partner, select Base Promotion in the Pricing Method field. For more information, see *Associating the Flight Redemption Product witha Program Partner*.
2. Set up a base redemption promotion to calculate the base redemption price. The base redemption promotion can calculate the base price using either attributes in the transaction or custom attributes. For example, it might calculate the base price using inputs such as load factor and inventory available. For more information, see *About Base Promotions* and see *Setting Up Siebel Loyalty Promotions*
3. Set up additional promotions to calculate discounts. The discount promotions might use inputs such as member tier and day of the week of the flight. For more information, see *Setting Up Siebel Loyalty Promotions*
4. If this promotion uses points to pay conversion, then you must also set up a promotion to charge a cash price that makes up for a possible shortfall of points. When you create the Redeem Points action for this promotion, enter information in the Cost Per Point fields that is used to calculate how much cash must be paid for each point that the customer is short. For more information about points to pay conversion, see *Points-To-Pay Conversion*.
5. Add these promotions to a promotion design. The redemption price determined by the base redemption promotions gets assigned to the transient variable associated with that point type. The subsequent redemption promotions in the promotion design use this transient variable to update the redemption discount. The final redemption price is based on this value as updated by the last promotion in the base redemption promotion design. For more information, see *Using Promotion Designer*.

Base redemption promotions and other redemption promotions that are Promotion-Designer enabled use the following actions:

- **Discount Points.** Reduces the number of points that the customer must pay for the redemption product. Used in redemption promotions of the redemption promotion design to calculate discount.
- **Discount Points plus (+) Pay.** Reduces the number of points and the amount of cash that the customer must pay for redemption product. Used in the redemption promotions of the redemption promotion design to calculate discount.
- **Redeem Points.** Reduces the number of points in the customer's point balance.
- **Redeem Points plus (+) Pay.** Reduces the number of points in the customer's point balance and also requires the customer to pay cash.

The actions Discount Points and Discount Points plus (+) Pay can handle the entire redemption discount, including reducing the point balance and charging additional cash. The actions Redeem Points and Redeem Points plus (+) Pay do not necessarily have to be used in promotion design. However, one can use these actions in the promotion design if the business requirement is that additional points must be redeemed or additional cash must be charged beyond the normal price of the product.

Discount Points and Discount Points plus (+) Pay are the opposite of Redeem Points and Redeem Points plus (+) Pay. Discount Points and Discount Points plus (+) Pay reduce the amount that the customer pays for the product. Redeem Points and Redeem Points plus (+) Pay increase the amount that the customer pays for the product.

Related Topic

Example of Setting Up Redemption Pricing Using Base Redemption Promotions

Process of Setting Up Airline Flight Redemptions

To set up pricing for airline flight redemption, the loyalty administrator performs the following tasks:

1. *Creating Zones Mapped to Airports*
2. *Creating the Flight Redemption Product*
3. *Associating the Flight Redemption Product witha Program Partner*
4. *Defining the Static Redemption Price for Flight Products*
5. *Setting Up the Flight Redemption Promotion*
6. *Using Electronic Vouchers for Redemptions*

For flight redemptions, a redemption log or transaction number is sent to an internal partner. The partner is the intermediary that issues a redemption ticket to the member and quotes the transaction number as a form-of-payment.

Creating Zones Mapped to Airports

You can price airline flight redemptions based on airports, distances, or zones.

To price an airline flight redemption based on zones, you must define zones and then map airports to those zones at the partner level.

This task is a step in *Process of Setting Up Airline Flight Redemptions*.

Creating Zones

If you are defining pricing by zone, then perform the following procedure to create the zones at the partner level.

This task is a step in *Process of Setting Up Airline Flight Redemptions*.

To create zones

1. Navigate to the Partners screen.
2. Click My Partners or All Partners to display a list of the available redemption partners.
3. Select the Partner record that you want.
4. Click the Zones view tab.
5. Add new records, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Zone Code	A code representing the zone.
Zone Name	Enter a name for the zone, for example, Western Europe or Australia.

Mapping Airports to Zones

If you are defining pricing by zone, then perform the following procedure to map zones to airports at the partner level.

This task is a step in *Process of Setting Up Airline Flight Redemptions*.

To map airports to zones

1. Navigate to the Partners screen.
2. Click My Partners or All Partners to display a list of the available redemption partners.
3. Select the Partner record that you want.
4. Click the Airport - Zone Map view tab.
5. Add new records, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Airport Code	Enter the code representing the airport.
Zone Name	Select the zone that this airport is in.

Creating the Flight Redemption Product

For an airline flight redemption, most frequent flyer programs only create one generic flight redemption product instead of creating products for each segment (for example, LHR-BOM), because they define redemption based on flight distance or on the departure and arrival zones.

> **Note:** If you define pricing in points, then you must create a separate flight redemption product for each segment, and you must define the pricing separately for each of these product.

The flight redemption product is not usually an electronic voucher, but it can be. If you are creating a product of the type Electronic Voucher, then see *Creating Vouchers for Loyalty Members*.

This task is a step in *Process of Setting Up Airline Flight Redemptions*.

To create the flight redemption product

1. Navigate to the Administration- Product screen, then the Products view.
2. Create a new record, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Name	Enter the name of the redemption product. For airline redemptions, you usually create generic products, such as First Class Flight or Economy Flight.
Type	The type of product that you are offering for redemption (for example, Product or Electronic Voucher).

Related Book

Siebel Product Administration Guide

Associating the Flight Redemption Product with a Program Partner

Associate the flight redemption product with the program partner who provides the redemption product to the customer.

If host company is the airline that provides the flight to the customer, then select the host company in the Partner field.

This task is a step in *Process of Setting Up Airline Flight Redemptions*.

To associate the redemption product with a program partner

1. Navigate to the Loyalty Program Administration screen.
2. Locate the program you want, and click its Program Id field.
3. Click the Partners view tab.
4. In the Partner's list, select the partner that you want.
5. In the Loyalty Product Offerings view for that partner, click New to add the airline redemption product and complete the necessary fields. Some fields are described in the following table.

Field	Description
Product	Select a redemption product that you created in *Creating the Flight Redemption Product*.
Start Date	Enter the start date for redemption product's association with this partner. **Note:** The start and end dates for the association must be within the start and end dates for the product. The redemption activity can only occur on a date that is within both the product's effective dates and the association's effective dates.
End Date	Enter the end date for redemption product's association with this partner.
Offer Type	Select Redemption as the type of product offering.
Pricing Method	If you are using pricing rules, then select the method that you use to enter the pricing rules in *Defining the Static Redemption Price for Flight Products*. Select one of the following methods: - Points - By Zone - By Distance

Field	Description
	If you are pricing using redemption base promotions, then select Base Promotion in this field. You must also create the base promotion and discount promotions used to determine the redemption price, as described in *About Pricing Using Base Redemption Promotions*, instead of determining the price as described in *Defining the Static Redemption Price for Flight Products*.
Accrual Template	If you are using accrual templates, then select the accrual template. For more information, see *Setting Up Loyalty Partner Product Offerings*.

Defining the Static Redemption Price for Flight Products

You can define redemption pricing rules in the Points, Points by Distance, or Points by Zone view, as described in *About Redemption Pricing*.

These rules determine the static redemption price for the redemption product. You can discount or surcharge this static price using a promotion.

Note: This topic describes how to set up pricing using redemptions rules, which is the most common method of setting up pricing. For more complex redemption pricing, you can set up pricing using base redemption promotions. For more information, see *About Pricing Using Base Redemption Promotions*.

This task is a step in *Process of Setting Up Airline Flight Redemptions*.

To create the redemption price using redemption rules

1. Navigate to the Administration - Product screen.
2. Select the redemption product.
3. Click the More Info view tab.
4. Click one of the following view tabs:
    - **Points.** You generally do not use the Points view for airline products. To define the redemption pricing for airline products in the Points view, you must create a separate product for each flight segment and define the pricing for each segment separately. If you are using this option, then click the Points tab, add a new record for this segment, and complete the following fields.

Field	Description
Payment Mode	The payment mode can be one of the following: - **Pay.** Payment is made using a currency. - **Points.** Payment is made using points. - **Points plus (+) Pay.** Payment is made using a combination of points and currency.

Field	Description
	Note: You can use different currencies for each price line for the pay component if you choose the Pay or Points plus (+) Pay options.
Pay	The currency portion of a Points plus (+) Pay payment mode. For example, US$250. This field is required for a Payment Mode of Pay or Points plus (+) Pay.
Partner Price	The price paid to the airline partner for payment of the flight. For more information, see *Partner Pricing for Loyalty Redemptions*.
Program	The program associated with the airline redemption.
Partner	The partner associated with the airline redemption. You can select one partner for each price line. If the pricing is common for different partners, then you have to create multiple price lines for each product. The list that you select from includes partners that were associated with the product in *Associating the Flight Redemption Product witha Program Partner*.
Departure Airport	The airport from where the flight departs.
Arrival Airport	The airport to where the flight arrives.
Departure Zone	The zone from where the flight departs. For example, AU for Australia.
Arrival Zone	The zone to where the flight arrives. For example, Asia1 for south-east Asia.
Booking Class	The class of the airline ticket. For example, economy, business class, or first class.
Round Trip	This flag indicates the airline ticket includes the return portion of the air travel back to the airport of origin.
Points	The price of the ticket in points. For example, 16,000 points. This field is required for a Payment Mode of Points or Points plus (+) Pay.

Field	Description
Point Type	The currency used by the loyalty program to reward and recognize members based on their activities. For example, FFP for frequent flyer points. To create point types, see *Creating Point Types for Loyalty Programs*. This field is required for a Payment Mode of Points or Points plus (+) Pay.
Qualifying Points	Qualifying points are points that count toward a member's tier status. For example, a member who needs to qualify for the silver tier might require 25, 000 qualifying points. Nonqualifying points, often called bonus points, can be used for a redemption, but do not count toward a member's tier status.
Transaction Type	The type of the transaction. For redemptions, select Redemption.
Cost per Point	The price for each point in currency value. For example, $0.04 US for each point.

- **Points by Zone.** If you have one generic redemption flight product and you define the pricing by zone, then click the Points By Zone tab, add a new record for each arrival zone-departure zone pair, and complete the fields shown in the following table.

Field	Description
Payment Mode	The payment mode can be one of the following: - **Pay.** Payment is made using a currency. - **Points.** Payment is made using points. - **Points plus (+) Pay.** Payment is made using a combination of points and currency. **Note:** You can use different currencies for each price line for the pay component if you choose the Pay or Points plus (+) Pay options.
Pay	The currency portion of a Points plus (+) Pay payment mode, for example, US $250. This field is required for a Payment Mode of Pay or Points plus (+) Pay.
Partner Price	The price paid to the airline partner for payment of the flight. For more information, see *Partner Pricing for Loyalty Redemptions*.
Program	The program associated with the airline redemption.
Partner	The partner associated with the airline redemption.

Field	Description
	You can select one partner for each price line. If the pricing is common for different partners, then you have to create multiple price lines for each product. The list that you select from includes partners that were associated with the product in *Associating the Flight Redemption Product witha Program Partner*.
Departure Zone	The zone from where the flight departs, for example, AU for Australia.
Arrival Zone	The zone to where the flight arrives, for example, Asia1 for south-east Asia.
Booking Class	The class type of the airline ticket, for example, economy, business class, or first class.
Round Trip	This flag indicates the airline ticket includes the return portion of the air travel back to the airport of origin.
Point Type	The currency used by the loyalty program to reward and recognize members based on their activities, for example, FFP for frequent flyer points. To create point types, see *Creating Point Types for Loyalty Programs*. This field is required for a Payment Mode of Points or Points plus (+) Pay.
Qualifying Points	Qualifying points are points that count toward a member's tier status. For example, a member who needs to qualify for the silver tier might require 25, 000 qualifying points. Nonqualifying points, often called bonus points, can be used for a redemption, but do not count toward a member's tier status.
Points	The price of the ticket in points, for example, 16,000. This field is required for a Payment Mode of Points or Points plus (+) Pay.
Cost per Point	The price for each point in currency value, for example, $0.04 US for each point.
Transaction Type	The type of the transaction. For redemptions, select Redemption.

- **Points by Distance.** If you have one generic redemption flight product and you define the pricing by distance, then click the Points By Distance tab, add a new record for each range of distances, and complete the fields in the following table.

Field	Description
From	In conjunction with the To field, use the From field to specify the distance between any two points for prespecified distance ranges. For example: 0 – 2000 Miles, 2001– 4000 Miles, 4001– 6000 Miles and Above 6000 miles. Enter the lower end of the distance range in the From field, for example, for a distance range of 0 to 2001 miles, enter 0.
To	In conjunction with the From field, use the To field to specify the distance between any two points for prespecified distance ranges. For example: 0 – 2000 Miles, 2001– 4000 Miles, 4001– 6000 Miles and Above 6000 miles. Enter the upper end of the distance range in the To field, for example, for a distance range of 0 to 2001 miles, enter 2001.
Payment Mode	The payment mode can be one of the following: - **Pay.** Payment is made using a currency. - **Points.** Payment is made using points. - **Points plus (+) Pay.** Payment is made using a combination of points and currency. **Note:** You can use different currencies for each price line for the pay component if you choose the Pay or Points plus (+) Pay options.
Partner Price Type	Choose one of the partner price types: - **Per Unit Distance.** The price is defined on a unit basis (for each mile or for each kilometer). For a distance of 5000 miles, for example, the price is calculated as 50 miles multiplied by the unit price. - **Slab.** The price defined for a distance range (slab). For example, for a distance range of 1 to 2001 miles, the partner price is constant for any flights that fall within that range. For more information, see *Partner Pricing for Loyalty Redemptions*.
Pay	The currency portion of a Points plus (+) Pay payment mode, for example, US $250.
Partner Price	The price paid to the airline partner for payment of the flight. For more information, see *Partner Pricing for Loyalty Redemptions*.
Program	The program associated with the airline redemption.
Partner	The partner associated with the airline redemption.

Field	Description
	You can select one partner for each price line. If the pricing is common for different partners, then you have to create multiple price lines for each product. The list that you select from includes partners that were associated with the product in *Associating the Flight Redemption Product witha Program Partner*.
Unit of Measure	The unit of measure for distance based pricing. Choose either Miles or Kilometers.
Booking Class	The class of the airline ticket, for example, economy, business class, or first class.
Round Trip	This flag indicates the airline ticket includes the return portion of the air travel back to the airport of origin.
Point Type	The type of point used by the loyalty program to reward and recognize members based on their activities, for example, FFP for frequent flyer points. To create point types, see *Creating Point Types for Loyalty Programs*. This field is required for a Payment Mode of Points or Points plus (+) Pay.
Qualifying Points	Qualifying points are points that count toward a member's tier status. For example, a member who needs to qualify for the silver tier might require 25, 000 qualifying points. Nonqualifying points, often called bonus points, can be used for a redemption, but do not count toward a member's tier status.
Points	The price of the ticket in points, for example, 16,000.
Cost per Point	The price for each point in currency value, for example, US$0.04 for each point.
Transaction Type	The type of the transaction. For redemptions, select Redemption.

Note: You cannot define duplicate lines having the same attributes and having the financial values in a given currency. That is, two lines for the same Program to Partner combination, for the same zones and for the same class can be defined, as long as the point type, or the payment currency differs.

Setting Up the Flight Redemption Promotion

After you set up the static price for the redemption product using the Points, Points by Zone or Points by Distance view, you must set up a promotion that applies to this static price.

You can use this promotion to add a discount or surcharge to the static price.nThe promotion must use an action of the type Redeem Points to make the price appear.

> **Note:** Even if you do not want to add a discount or surcharge, you must create this promotion. If you do not, then the static price does not appear.

Example of a Flight Redemption Promotion

This topic gives one example of setting up the flight redemption promotion. You might use this feature differently, depending on your business model.

In this example, the promotion applies a 25% discount on flights between London's Heathrow or Gatwick airports and Toronto's Pearson airport on Bravo Air (BA).

To set up this example, perform the following high-level steps:

1. Define Origin, Destination City, Partner as Program level attributes (transaction attributes).
2. Create a new Rule: 25% discount on Redemption.
3. Define the promotion criteria using the following transaction attributes:
    - If Origin Airport equals LHR or LGW, Destination Airport equals YYZ
    - If Partner equals BA
4. Define the promotion action as follows:
    - Action equals Redeem Points
    - Object equals Transaction
    - Attribute equals Transaction Points
    - Operator equals Multiply
    - Value equals .25

Using Electronic Vouchers for Redemptions

If you chose the product type of Electronic Voucher in *Creating a Nonflight Redemption Product*, then you must also:

- Create a promotion to assign the voucher to members. The promotion must have the action Assign Voucher. For more information, see *Process of Creating Loyalty Promotions*.
- Perform the set up tasks needed to pay the partner who received the voucher and provided the product. For more information, see *Partner Pricing for Loyalty Redemptions*.

About Nonflight Redemptions

Nonflight redemptions can be completed for a tangible product such as a CD player or a service such as a car rental:

- **Redemption for a tangible product.** Redemption for a tangible product involves redeeming points for any item available in online stores, or for a gift voucher which can be used at a retail chain store. Examples of online stores include digital camera stores, audio-video equipment stores, luggage stores, gift shops, and so on. In this case, the member adds the product to the member's online shopping cart. The store provides a quotation in points-plus-pay. If the member accepts the quotation, then Siebel Loyalty debits the points from the member's account, and initiates a credit card payment process for the member to pay the currency portion.
- **Redemption for a service.** Redemption for a service involves redeeming points to receive an award certificate or voucher for using the service at a later date. The services can include a stay at a hotel or a car rental service. As with redemptions for products, the member can pay for redemptions for a service with points as well as a currency. The only difference is that the member receives a voucher or award certificate from the loyalty program that the member can use with the hotel or car rental agency at any future date, before the voucher expiry date.

For information about setting up redemption for a service, see *Process of Setting Up Nonflight Redemptions*.

Process of Setting Up Nonflight Redemptions

To set up pricing for nonflight redemption, the loyalty administrator performs the following tasks:

- *Creating a Nonflight Redemption Product*
- *Associating the Nonflight Redemption Product witha Program Partner*
- *Defining the Static Redemption Price for Nonflight Products*
- *Setting Up the Nonflight Redemption Promotion*
- *Setting Up Order Management for the Product*
- *Using Electronic Vouchers for Redemptions*

Creating a Nonflight Redemption Product

For tangible products, it is common to allow the member to redeem the product by making a purchase on a Web site. For example, you can set up a portable CD player as a redemption product, flag the product as Orderable for Siebel Order Management, and create a Web store where customers can order that product and other products.

For services and for some tangible products, it is common to give the member an electronic voucher that the member can redeem for the product. For example, the member can get an electronic voucher that can be redeemed for a one-night stay at a hotel. In this case, choose Electronic Voucher in the Product Type field.

If you are creating a product of the type Electronic Voucher, then see *Creating Vouchers for Loyalty Members*.

This task is a step in *Process of Setting Up Nonflight Redemptions*.

To create a nonflight redemption product

1. Navigate to the Administration Product screen.
2. Create a new record, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Name	Enter the name of the redemption product.
Type	The type of product that you are offering for redemption (for example, Product or Electronic Voucher).

Related Book

Siebel Product Administration Guide

Associating the Nonflight Redemption Product with a Program Partner

Associate the nonflight redemption product with the program partner who provides the product to the customer.

This task is a step in *About Nonflight Redemptions*.

To associate the redemption product with a program partner

1. Navigate to the Loyalty Program Administration screen.
2. Locate the program you want, and click its Program Id field.
3. Click the Partners view tab.
4. In the Partner's list, select the partner that you want.
5. In the Loyalty Product Offerings view for that partner, click New to add the redemption product and complete the necessary fields. Some fields are described in the following table.

Field	Description
Product	The redemption product that you created in *Creating the Flight Redemption Product*.
Start Date	The start date for the redemption product's association with this partner. **Note:** The start and end dates for the association must be within the start and end dates for the product. The redemption activity can only occur on a date that is within both the product's effective dates and the association's effective dates. It is used for validating the redemption request.

Field	Description
End Date	The end date for the redemption product's association with this partner.
Offer Type	The type of product offering. Select Redemption from the drop-down list for redemption products.
Pricing Method	Select one of the following options: ○ **Points**. Select points if you are defining the pricing using redemption rules, as described in *Defining the Static Redemption Price for Nonflight Products*. You define the pricing rule list for the nonflight redemption product in the Points view. ○ **Base Promotion.** Select Base Promotion if you are pricing using redemption base promotions. You must also create the base promotion and discount promotions used to determine the redemption price, as described in *About Pricing Using Base Redemption Promotions*, instead of determining the price as described in *Defining the Static Redemption Price for Nonflight Products*. ○ **Note:** For nonflight redemptions, the pricing method must be Points or Base Promotion. Points by Zone and Points by Distance are applicable only for flight redemptions.

Defining the Static Redemption Price for Nonflight Products

You can define the pricing for a nonflight product in the Points view of the Administration - Products screen. For example, you can set up a redemption price of 16,000 points for a redemption product such as an electric shaver, or 100,000 points for a one-night stay in a hotel.

These rules determine the static redemption price for the redemption product. You can discount or surcharge this static price using a promotion.

Note: This topic describes how to set up pricing using redemptions rules, which is the most common method of setting up pricing. For more complex redemption pricing, you can set up pricing using redemption promotions. For more information, see *About Pricing Using Base Redemption Promotions*.

This task is a step in *Process of Setting Up Nonflight Redemptions*.

To create the redemption price

1. Navigate to the Administration Product screen.
2. Select the redemption product.
3. Click the More Info view tab.
4. Click the Points view tab.

Note: For nonflight redemptions, you must use the Points view for pricing. Points by Zone and Points by Distance are used only for flight redemptions.

5. Add a new record for each program-partner combination that uses this product, and complete the necessary fields, described in the following table.

Field	Description
Payment Mode	The payment mode can be one of the following: o **Pay.** Payment is made using a currency. o **Points.** Payment is made using points. o **Points plus (+) Pay.** Payment is made using a combination of points and currency. **Note:** You can use different currencies for each price line for the pay component if you choose the Pay or Points plus (+) Pay options.
Pay	The currency portion of a Points plus (+) Pay payment mode, for example, US$250.
Partner Price	The price paid to the partner for providing the product. For more information, see *Partner Pricing for Loyalty Redemptions*.
Program	The program associated with the product redemption.
Partner	The partner associated with the product redemption. You can select one partner for each price line. If the pricing is common for different partners, then you have to create multiple price lines for each product. The list that you select from includes partners that were associated with the product in *Associating the Nonflight Redemption Product witha Program Partner*.
Points	The price of the product in points, for example, 16,000 points.
Point Type	The currency used by the loyalty program to reward and recognize members based on their activities, for example, FFP for frequent flyer points. To create point types, see *Creating Point Types for Loyalty Programs*. This field is required for a Payment Mode of Points or Points plus (+) Pay.
Qualifying Points	Qualifying points are points that count toward a member's tier status. For example, a member who needs to qualify for the silver tier might require 25,000 qualifying points. Nonqualifying points, often called bonus points, can be used for a redemption, but do not count toward a member's tier status.
Transaction Type	The type of the transaction. For redemptions, select Redemption.

Field	Description
Cost per Point	The price for each point in currency value, for example, $0.04 US for each point.

Setting Up the Nonflight Redemption Promotion

After you set up the static price for the redemption product using the Points view, you must set up a promotion that applies to this static price. You can use this promotion to add a discount or surcharge to the static price.

The promotion must use an action of the type Redeem Points to make the price appear.

> **Note:** Even if you do not want to add a discount or surcharge, you must create this promotion. If you do not, then the static price does not appear.

Example of a Nonflight Redemption Promotion

This topic gives one example of setting up the nonflight redemption promotion. You might use this feature differently, depending on your business model.

In this example, the promotion applies a 25% discount on a camera.

To set up this example, perform the following high-level steps:

1. Create a new Rule: 25% discount on Redemption.
2. Define the promotion criteria using the following transaction attribute:
    - If Product equals XYZ Superzoom Camera
3. Define the promotion action as follows:
    - Action equals Redeem Points
    - Object equals Transaction
    - Attribute equals Transaction Points
    - Operator equals Multiply
    - Value equals .75

Setting Up Order Management for the Product

If you are creating a tangible product that is sold in a Web store, then you must set up the Web store, and set up order management and fulfillment.

This task is a step in *Process of Setting Up Nonflight Redemptions*.

Related Book

Siebel Order Management Guide

Using Electronic Vouchers for Redemptions

If you chose the product type of Electronic Voucher in *Creating a Nonflight Redemption Product*, then you must also:

- Create a promotion to assign the voucher to members. The promotion must have the action Assign Voucher. For more information, see *Process of Creating Loyalty Promotions*.
- Perform the set up tasks needed to pay the partner who received the voucher and provided the product. For more information, see *Points-To-Pay Conversion*.

Sequence for Redeeming a Tangible Product Through a Web Store

Once the loyalty administrator has set up the redemption points and the pay price list, the members can pay in points or a currency to redeem a desired tangible product. The following sequence describes the how the member interacts with Siebel Loyalty to redeem points for a tangible product:

1. The member signs into the online store using the Member Portal, a Contact Center-based task UI, or a third-party system.
2. Siebel Loyalty:
   a. Identifies and authenticates the member at the Loyalty Web site.

      Obtains the member's information.
   b. The member initiates the redemption process either by calling the contact center or a travel agent, or by signing in to the Loyalty Web site. If the member uses the Web site or a travel agent, then the third-party system needs to obtain the member information after identifying the member, to facilitate the redemption process. The Loyalty business service then displays the required details of the member such as the member's name, tier, and point balance, preferred delivery channel, delivery channel details such as the member's address, and so on.
   c. Checks the member's redemption eligibility.

      The member's redemption request is processed only if the member's current status has no restriction on redemption activity. If the membership status is Due for Renewal, Terminated or Expired, then the member might not be allowed to redeem. The Check Redemption Eligibility business service retrieves the current membership status of the member and refers to the Status of Membership setup to check the restrictions that are set for that status. The loyalty program can call this business service just before providing a quotation to a member. This call enables the member to browse through the catalog and encourages the member to update the member's status to active, for example, by renewing the membership.
   d. Displays the member's information.
3. The member does the following:
   a. Browses through the online store catalogue.

      The member browses through the selection of products available and adds the desired products for purchase into a shopping cart. The member can add and amend his cart at any time prior to confirming his order.

b. Selects the desired product or products in the product catalog in the Member Portal.

4. Siebel Loyalty calls the Get Redemption Price business service to provide the applicable price for the product on that date, to the member. Online stores normally show the static prices for orderable products. The Get Redemption Price business service is required for the loyalty program to display the current prices (which might be different from the displayed prices) or to run a promotion.

   The Get Redemption Price business service:

   a. Refers to product base price.

      The Get Redemption Price business service checks the partner product offering to validate the redemption for partner, product, association effective dates to get the pricing type. Based on the pricing type set for the partner-product offering, the business service retrieves the prices for the product that is defined. If variable prices are set up, that is, different combinations of point type and currency, then the business service can either obtain all the price combinations or obtain the price only for the point type and currency selected for the online store.

   b. Checks whether a promotion is applicable.

      The business service checks whether there is a promotion applicable for the ordered product.

   c. Calculates the redemption price.

      If a promotion is applicable to the product, then Get Redemption Price calculates any discount on the order price, or based on the number of units being ordered for the same item, calculates the total price.

   d. Returns the redemption price to the online store.

      Get Redemption Price returns the output of the calculation to the calling application, in this case, the online store.

5. The online store displays the price options.

   The online store displays the various price options to the member. The catalog UI has a Pay field in the price options table to show the points-plus-pay option. The table displays all the prices that are set for a given program, partner, and product combination, in different point types and currencies. For example: 10,000 Miles, 8,000 Miles and US$40, 5,000 Miles and 30 Euro, 100 Francs, and so on.

6. The member:

   a. Selects the price option and adds the product to the shopping cart.

      The member selects the price option that best suits the member (based on the member's current point balance), and adds it to the member's shopping cart.

      The List Price field displays the currency component of the redemption price, if the member chooses the Points plus (+) Pay option. The base List Price is defined in the product and is modified by any applicable promotion. The Current Price field is used to display the currency price, which the member needs to pay. The Current Price can be the same as or different from the List Price. If it is different, then the loyalty program compares the points part of the redemption price with the member's point balance and, if the balance is less than the points required, then the difference is converted to a currency amount by using the cost for each point.

      The following is an example of how Siebel Loyalty calculates the current price:

      - Redemption price (List Price) : 10,000 plus $20.00
      - Member's point balance : 5,000
      - Point difference : 5,000

- Cost per point: $0.04
- Cost for point difference: $200 (5000 points * $0.04/point)
- Current price: $220 ($20 from redemption price plus $200 for point difference)

Once the member adds the item to shopping cart, the product name and the current price is displayed in the cart.

b. Checks the Shopping Cart.

The member confirms the details of the member's order. If the member amends the quantity to purchase, then the modified price in points or points-plus-pay displays. If the member is satisfied with the order details, then the member can click Check out to proceed.

Alternatively, the member can click Save Cart to save the current shopping cart for processing at a later time, or click Empty Cart to clear the shopping cart and not place any orders.

c. Confirms the delivery address for the purchase.

The member enters the preferred delivery address for the product purchase. In some cases, the member has an additional option to select from the last four addresses for previous product purchases.

> **Note:** This step is not applicable to the Member Portal.

d. The member enters the credit card details.

If the purchase involves currency payment, then the member either selects and confirms existing credit card information, or provides new credit card information.

7. The online store creates a quotation.

The online store calls Siebel Order Management to create a quotation that provides both the points and currency payment amount as input parameters.

8. Siebel Order Management:

a. Checks and calculates any shipping charges.

b. Checks and calculates any required taxes.

Siebel Order Management checks for the currency component in the price to calculate the taxes required for the purchase.

c. Calculates the taxes.

Siebel Order Management calculates the taxes owing on the purchase and returns the total quotation in points, pay and tax to the online store.

For more information on Siebel Order Management, see *Siebel Order Management Guide* .

9. The Online store displays the quotation returned by Siebel Order Management.

The Online store displays the quotation in the Order Summary page.

10. The member:

a. Checks the Order Summary.

The member ensures that the order and delivery address details are correct before confirming the order.

b. Confirms the order.

The member confirms the order.

11. Siebel Loyalty calls the Credit Check business service to check the member's credit.

Siebel Loyalty calls the Credit Check business service to verify the member has sufficient points to make the redemption purchase. If the member has fewer points than required, then the business service refers to the Loan setup at the member tier level. The Loan setup checks the extent of the loan to be extended to the member and compares it with the redemption quotation for validation. The business service is described in detail in *Sequence for Loyalty Credit Check*. The credit check has the following results:

- If the credit check is successful, then the member can proceed to complete the order.
- If the credit check fails, then Siebel Loyalty informs the member accordingly, and ends the process.

12. Siebel Order Management creates the order.

    Siebel Order Management creates an order number with the product as a line item, price and shipping details. For more information on Siebel Order Management, see *Siebel Order Management Guide* .
13. Siebel Order Management processes the credit card payment:

    a. Siebel Order Management initiates the collection of currency payment through the payment gateway. If the payment is successful, then Siebel Loyalty proceeds. If the payment fails, then Siebel Loyalty updates the payment status accordingly, and ends the process.
    b. If the credit card payment is successfully processed, then Siebel Order Management calls the Loyalty business service to create a redemption transaction to debit the member's point balance with the quoted price in points. If the credit card processing fails, then Siebel Loyalty updates the payment status accordingly, and ends the process.
    c. Siebel Order Management returns the order number and the payment reference number (for the credit card payment) to the calling application, which in turns provides the order invoice to the member.
    d. Siebel Order Management initiates the shipment of the purchased item to the member's delivery address.

    For more information on Siebel Order Management, see *Siebel Order Management Guide* .

About Electronic Vouchers

Electronic vouchers can be issued to customers and used by them to obtain redemption products. For information about creating vouchers, see *Creating Vouchers for Loyalty Members*.

When Are Vouchers Issued?

Siebel Loyalty issues a voucher for a redemption transaction based on the product type being redeemed. It issues a voucher in the following cases:

- The product type is Electronic Voucher.
- The product is a bundled product (that is, it is a packaged product) and at least one of its constituent products is of type: electronic voucher. In this case, Siebel Loyalty issues one voucher for each constituent product of type electronic voucher.
- The Assign Voucher action is satisfied in any of the promotions while processing the redemption transaction, and the voucher type is specified in the promotion action (that is, the Use from Transaction flag is not selected).

The expiry date of the voucher is determined by the voucher expiry date that is set up when the voucher product is created. For more information about creating voucher products, see *Creating Vouchers for Loyalty Members*.

Difference Between Vouchers for Flight and Nonflight Redemptions

Vouchers are used differently for flight and nonflight redemptions:

- **Flight Redemptions.** Vouchers are not used for most flight redemptions. When vouchers are used for flight redemptions, the electronic voucher or redemption log number is used as a form of payment for the airline or internal partner to issue a ticket to the member. Once the reservation system issues the ticket, it flags the electronic voucher as Availed to prevent anyone else from using it. The reservation system automatically sends a notification to Siebel Loyalty on the electronic voucher's usage.
- **Nonflight Redemptions.** Vouchers are generally used for nonflight redemptions for services, such as a stay at a hotel room or a car rental. The member quotes the voucher number as a form of payment to the partner who provides the service. The partner validates the activity with the loyalty program operations. The program operators manually change the voucher status to Reserved. This status prevents the member from quoting the voucher number to another partner to obtain a redemption product. Once the member goes to the partner and presents the voucher to use the redemption, the Partner contacts loyalty program operations or sends a batch of redemption transactions to change the status of the vouchers to Availed or Used.

Partner Payment for Redemption Vouchers

Partners need to receive payment for the products or services used by the members of the loyalty program during redemption. Partners submit redemption transactions and send invoices for payment by the loyalty program.

Depending on the partnership agreement, redemption vouchers can be immediately validated, used and paid, as is the case with airline redemption. In this case, the Loyalty operation does not wait for the member to fly on the partner airline, but pays the partner when issuing the redemption ticket, through the bank settlement plan of the International Air Transport Association (IATA).

Some airlines follow a different business practice. The electronic vouchers are used at the time of lifting the first coupon in the ticket instead of the time of ticket issue.

An issued voucher that is used, cannot be expired for revenue recognition, and attains the Invoiced status when a partner payable is created against the voucher.

Voucher Status Validation

You can validate the voucher status at the time of redemption with the LOY Voucher Service business service, using the VoucherValidityCheck method. This method validates the voucher using input parameters on the membership number, Partner Id, voucher number, and activity date. It determines whether the voucher validation is successful or not. For more information on this business service and method, see *Siebel CRM Web Services Reference* .

Redemption Voucher Status

The redemption voucher undergoes the following status during the voucher's life cycle, for nonflight redemption:

- **Available**. Siebel Loyalty issues the voucher to the member.
- **Cancelled**. The member returns the voucher to the loyalty program operations to cancel the voucher.
- **Reserved**. The member uses the voucher to book a partner product or service.
- **Used**. The member presents the voucher for the partner product or service. To attain this status, the partner has to notify Siebel Loyalty about the availability of the voucher.
- Invoiced. The partner sends an invoice against the voucher.
- **Paid**. The Finance department makes payment against the invoice and voucher.
- **Expired**. The revenue is recognized after a defined time period from the expiry date.
- **Closed.** The voucher is closed and cannot be used.
- **Reissued.** A voucher is reissued when another voucher is issued in its place. A voucher can be reissued only if it is in either of the statuses: Available or Reserved. For example, if a voucher V1 goes into the Reissued status when another voucher, V2, is issued in its place, then after the reissue process, the V1 status is Reissued, and the new voucher V2 status is either Available or Reserved. Voucher V2 contains a reference to the original voucher, V1.

Voucher Revenue Recognition

In the Redemption Voucher model described in *Process of Setting Up Nonflight Redemptions*, the member uses the voucher as a form of payment to obtain a redemption product. Every voucher has an expiry date. The member needs to use the voucher to obtain the redemption product or service prior to the expiry date.

Siebel Loyalty validates each used voucher by checking the date of activity against the expiry date of the voucher. If the date of the activity occurs after the voucher expiry date, then the loyalty program rejects the voucher.

Occasionally, the information for a voucher used before its expiration date is not sent to Siebel Loyalty until after the expiration date has passed. To handle such occurrences, Siebel Loyalty creates an additional time window for the voucher to completely expire, and to recognize revenue against the voucher. This time window is the amount of time after a voucher's expiration date when it can still be used. At the end of this time period, if the voucher is not yet used, then the voucher's status is changed to Expired, and the revenue is recognized.

Sequence for Redeeming Electronic Vouchers

After the loyalty administrator has set up the redemption voucher types and the points and pay price list, the members can pay in points or a currency to redeem a desired product. The product can either be a service product such as a hotel room or a tangible product that the member redeems by using an electronic voucher.

The following sequence describes how a member interacts with Siebel Loyalty to redeem points for an electronic voucher.

1. The member calls the service center for redeeming the member's points for a nonflight service product.

2. The service agent identifies and authenticates the member.
3. The redemption process:
    a. Obtains the member's information.

        The member initiates the redemption process either by calling the service center, calling a travel agent, or by logging onto the Loyalty Web site. If the member calls the service center, then the agent needs to get the member information after member identification, which facilitates the redemption process. The redemption process calls the Loyalty business service to display the required details of the member, such as the member's name, tier, point balance, preferred delivery channel, delivery channel details, such as the address, and so on.
    b. Checks the member's redemption eligibility.

        The member's redemption request is processed only if the member's current status has no restriction on redemption activity. If the membership status is Due for Renewal, Terminated or Expired, then the member might not be allowed to redeem. The Check Redemption Eligibility business service retrieves the current membership status of the member and refers to the Status of Membership setup to check the restrictions that are set for that status. The loyalty program can call this business service just before providing a quotation to a member. This call enables the member to browse through the catalog and encourages the member to update the member's status to active, for example, by renewing the membership.
4. The service agent searches from the products available and selects the product requested by the member.
5. The redemption process obtains the redemption price.

    The task UI then calls the Get Redemption Price business service to provide the member with the applicable price on the request date. Online stores normally show the static prices for orderable products. The Get Redemption Price business service is required if the loyalty program is to show the current prices (which might be different from the displayed prices), or to run a promotion.
6. The Get Redemption Price business service:
    a. Refers to the product price.

        The Get Redemption Price business service checks the partner product offering to validate the redemption for partner, product, and association effective dates and to get the pricing type. Based on the pricing typeset for the partner-product offering, the business service retrieves the prices for the product defined. If variable prices are set up, for example, different combinations of point type and a currency, then the business service can either get all the price combinations, or get the price only for the point type and currency selected on the online store.
    b. Checks if a promotion is applicable.

        The business service checks whether there is a promotion applicable for the ordered product.
    c. Calculates the redemption price.

        If there is an applicable promotion, then it calculates any discount on the order price or, based on the number of units being ordered for the same item, calculates the total price.
    d. Returns the redemption price.
    e. Returns the output of the calculation to the calling application, in this case the online store.
7. The Check Price business service performs a points credit check.

    This service checks whether the price options are valid, that is, whether the redemption can proceed using the price options for this member. It also returns the point balances of the member in all the applicable point types along with the points shortfall, if any. Finally, it invokes a points-to-pay conversion, as required, for any of the point types.

8. The agent displays the price options.

   The agent then gets the different price options in points plus pay in the Task UI along with the member's point balance. Using this information, the agent is able to advise the member of the correct option in line with his current point balance.
9. The member confirms the price.

   The member confirms the price option and the service agent accordingly selects the same on the Task UI.
10. The service agent:
    a. Confirms the address.

       The service agent confirms the delivery address where the member prefers to receive his service voucher.
    b. Captures the credit card details.

       The agent captures the member's credit card details for payment of the product he has selected.
11. Siebel Order Management:
    a. Creates a quotation.

       The Service Center Task UI calls Siebel Order Management to create a quotation, providing both the points as well as the pay amount.
    b. Checks for currency payment.

       Siebel Order Management checks for the currency component of the price to calculate taxes.
    c. Calculates shipping charges.

       Siebel Order Management calculates any shipping charges to deliver the product.
    d. Calculates the taxes.

       Siebel Order Management calculates taxes on the redemption and returns the total quotation in points, pay and tax.
    e. Displays the quotation.

       The Service Center Task UI displays the quotation from Siebel Order Management.

       For more information on Siebel Order Management, see *Siebel Order Management Guide* .
12. The member accepts the quotation.

    The Member confirms the details of the quotation.
13. The Credit Check business service verifies that the member has sufficient point balance to make the redemption purchase. If the member's point balance falls short of the points required, then the business service refers to the Loan setup at the member tier level. The service checks the extent of the maximum loan, and compares it with the redemption price (in points) to validate whether there are sufficient points to proceed.
14. The service agent proceeds to fulfill the member's request.

    If the credit check is successful, then the agent can proceed to fulfill the member's request. If the credit check is unsuccessful, then the service agent informs the member accordingly and the process is terminated.
15. Siebel Order Management:
    a. Creates the order.

       Siebel Order Management creates an order with the product as a line item.
    b. Processes the credit card payment.

The Task UI calls Siebel Order Management to process the currency payment.

16. The Loyalty business service:
    a. Creates a redemption transaction.

       If the credit card payment is successful, then the Loyalty business service creates a redemption transaction by debiting the member's point balance with the quoted price in points. It creates a redemption transaction for each order line rather than a redemption transaction for one order. The transaction stores a reference to the order.
    b. Issues a voucher for a redemption transaction based on the product type being redeemed:
       - The product type is electronic voucher.
       - The product is a bundled product (that is, it is a packaged product) and at least one of its constituent products is of type: electronic voucher. In this case, Siebel Loyalty issues one voucher for each constituent product of type electronic voucher.
       - The Assign Voucher action is satisfied in any of the promotions while processing the redemption transaction, and the voucher type is specified in the promotion action (that is, the Use from Transaction flag is not selected). In this case, Siebel Loyalty issues a voucher only for the product of type electronic voucher. Even if this product is a bundled product, Siebel Loyalty does not issue vouchers for the constituent products of the product, even if they are of type electronic voucher.

Example of Setting Up Redemption Pricing Using Base Redemption Promotions

This topic gives one example of setting up airline pricing using the base redemption promotion design. You might use this feature differently, depending on your business model.

It is most common to set up redemption pricing using pricing rules, as described in *Defining the Static Redemption Price for Flight Products* and *Defining the Static Redemption Price for Nonflight Products*. To define more complex pricing, you can use base redemption promotions, as described in this example.

This example describes a flight redemption, but base redemption promotions can also be used for nonflight redemptions.

In this example, the base promotion gives the base redemption price to members based on external factor such as revenue associated with ticket. Additional promotions in the promotion design apply discounts to this base price that depend on the member's tier: base members get a 5% discount, silver members get a 10% discount, gold members get a 20% discount, and platinum members get a 30% discount and additional 10% discount based on booking channel. Members have the option of using only points or using points plus pay to get the redemption product. This base redemption promotion design is applicable only to members who are more than 18 years old and are US citizens.

To set up this example, perform the following high-level steps:

1. Define the redemption product that represents the particular flight that this pricing applies to. For more information, see *Process of Setting Up Airline Flight Redemptions*.

   As part of the process of setting up redemption pricing, you associate the redemption product with a partner, and when you do this, you must select Base Promotion in the Pricing Method field. For more information, see *Associating the Flight Redemption Product witha Program Partner*.
2. Set up the transient variable (optional).

When you create a new non-qualifying point type in the given program to be used for redemption, a transient variable is automatically created aligning with this point type. However, if the point type already exists and you want to create a transient variable for this point type, then you must do the following:

a. Navigate to the Program screen, Program Level Attributes, then the Transient Attributes view.
b. Create a new transient attribute.
c. Align this transient attribute to the given point type and give it a default value of zero.

3. Define the base redemption promotion for the product.

a. Create the Promotion record, and select the promotion Designer Availability checkbox and the Base checkbox.
b. Create the first rule in the base promotion, which simulates all the price options available for the member, including Points and Points plus (+) Pay.

- Create the criteria for this rule, which include 1) ticket revenue (gotten from the transaction amount) multiplied by 1000 to get base points, 2) product name, and 3) can include other criteria (such as the partner name, if the same product is offered by more than one partner with different pricing).
- Create the action for this rule. The action type is Redeem points, for the appropriate type of points and number of points.
- Create a second action of the type Redeem Points plus (+) Pay, with both a point type and value and a currency value.
- If tickets can be purchased using multiple currencies, then create additional actions of the type Redeem Points plus (+) Pay, with the point type and value and currency values using the other currencies.
- Create separate rules for each product and partner. This is required because the same promotion design applies to the entire product and partner category.

c. Create the next rules in the base promotion, which set the base price based on the price option the member selects. There must be separate rules for payment mode equals points and for payment mode equals Points plus (+) Pay. If there are multiple currency options, then there must be a rule for payment mode equals Points plus (+) Pay with each available transaction currency.

- These rules have criteria to check the payment mode.
- Other criteria might include product or partner. There must be separate rules for each combination of product and partner that the promotion applies to. (Criteria for product and partner is recommended for partners and product which have same partner and product category respectively, because a promotion design will contain a single base promotion that is applied for all the redemption offerings for this product-partner combination.)
- The actions are Redeem Points or Redeem Points plus (+) Pay, depending on the payment mode.

4. Create the next promotion, which gives members a discount based on the member tier.

a. Create the first rule of this promotion.
   - The rule has criteria to check that the value of Member Tier equals Base Member.
   - The rule has actions of the type Discount Points and Discount Points plus (+) Pay, which give a discount of 5%.
b. Create the second rule of this promotion.

- The rule has criteria to check that the value of Member Tier equals Silver Member.
- The rule has actions of the type Discount Points and Discount Points plus (+) Pay, which give a discount of 10%.

c. Create the third rule of this promotion.

   - The rule has criteria to check that the value of Member Tier equals Gold Member.
   - The rule has actions of the type Discount Points and Discount Points plus (+) Pay, which give a discount of 20%.

d. Create the fourth rule of this promotion.

   - The rule has criteria to check that the value of Member Tier equals Platinum Member.
   - The rule has actions of the type Discount Points and Discount Points plus (+) Pay, which give a discount of 30%.

5. Create the next promotion, which gives members a discount based on booking channel.

   a. Create the rule of this promotion.

      - The rule has criteria to check that the value of Booking Channel equals Web.
      - The rule has actions of the type Discount Points and Discount Points plus (+) Pay, which give a discount of 10%.

6. Create an eligibility promotion to check for members who are US citizens and are more than 18 years old.
7. Add all these promotions to a flow chart so they are executed in the proper sequence:

   a. Create the promotion design. Give it a name and start and end dates. Select Redemption Product as the apply-to. In addition, select the appropriate product category and partner category.
   b. Add the Start object.
   c. Add the Eligibility Promotion object, and select the eligibility promotion you created.
   d. Add the Base Redemption Promotion object, and select the base promotion you created.
   e. Add the Promotion object, and select the promotion you created to give members a discount based on member tier.
   f. Add the Promotion object, and select the promotion you created to give members a discount based on booking channel.
   g. Add the End object.
   h. Validate the promotion design by clicking the Validate button.
   i. When the Validation Status is Green (where the status bar appears in the color green), activate the promotion design.

   For more information about working with Promotion Designer, see *Using Promotion Designer*.

Example of Creating Promotions to Assign Values to Vouchers

This topic gives one example of creating promotions to assign values to vouchers. You might use this feature differently, depending on your business model.

In this example, there is a promotion that gives members vouchers as rewards. If members spend $100, then they get a voucher that is good for a $10 discount. If members spend $200, then they get a voucher that is good for a 10% discount.

To create a promotion to assign a value to a voucher

1. Create a generic voucher in the usual way, as described in *Creating Vouchers for Loyalty Members*. Some fields are described in the following table.

Field	Description
Name	Discount Voucher
Type	Electronic Voucher

2. Create the promotion in the usual way, described in *Process of Creating Loyalty Promotions*.
3. For the first rule for the promotion, create a criterion that applies the rule to purchases greater than $100 and less than $200, and create an Action that gives the Voucher the absolute value of $10 discount:
    a. Navigate to the Loyalty Promotion Administration screen, then the Promotion, Rule, and Action view.
    b. In the Action view, complete the necessary fields, described in the following table.

Field	Description
Voucher	Discount Voucher
Discount Type	Absolute Value
Voucher Discount Value	10
Currency	USD

4. For the second rule for the promotion, create a criterion that applies the rule to purchases greater than $200, and create an action which gives the Voucher the value of 10% discount:
    a. Navigate to the Loyalty Promotion Administration screen, then the Promotion, Rule, and Action view.
    b. In the Action view, complete the necessary fields, described in the following table.

Field	Description
Voucher	Discount Voucher
Discount Type	Percentage
Voucher Discount Value	10

Field	Description
Currency	not applicable

Partner Pricing for Loyalty Redemptions

At the end of the redemption process, after the member receives the redemption voucher or the redemption product, the loyalty program needs to pay the Partners who have offered the redemption products.

Partner price can be defined in Siebel Loyalty in the Products screen, Points, Points by Zone, or Points by distance view, Partner Price field. For more information, see the following topics:

- *Defining the Static Redemption Price for Flight Products*.
- *Defining the Static Redemption Price for Nonflight Products*.

Depending on your business model, in some cases, you might need to configure Siebel Loyalty and integrate it with some external application, such as Oracle Business Intelligence, to calculate the final partner redemption price.

Redemption Packages

Redemption packages allow members of Siebel Loyalty programs to redeem their points for two or more products offered by different partners. Loyalty operations provides these offers to members during off season, when the members can get these products at discounted prices (in points).

Redemption packages can be set up in two ways:

- A redemption package be set up as a promotion. For more information, see *About Setting Up Redemption Packages as Promotions*.
- A redemption package can be set up as a bundle product. For more information, see *Setting Up Redemption Packages as Bundled Products*.

About Setting Up Redemption Packages as Promotions

The redemption package promotion is invoked if the member redeems more than one product specified in the package. This topic describes the redemption product, base price list, and promotion setup.

Another approach is to use a bundle product. A bundle product enables a user to select more than one product in the bundle product and set the price at the bundle product level.

The redemption package setup as a promotion has several subprocesses. The required promotion setup is as follows:

- Redemption voucher type setup.
- Redemption product and base price list setup. For more information, see *Example of Setting Up a Redemption Product and Base Price List for a Redemption Package*.

- Redemption promotion setup. For more information, see *Example of Setting Up a Redemption Promotion for a Redemption Package*.

The transaction processing that occurs is as follows:

- Initiate a redemption request on a Service Center UI, or loyalty program portal or third-party system
- Generate a quotation (using Get Redemption Price)
- Collect credit card payment (if points plus pay and taxes are used)
- Create a redemption transaction
- Generate a redemption voucher (if the product has a voucher)
- Issue the redemption voucher (if the product has a voucher)

Example of Setting Up a Redemption Product and Base Price List for a Redemption Package

To set up a redemption product and base price list, complete the steps in the following procedure.

To set up a redemption product and base price list

1. Create new redemption products in the Loyalty Admin – Products tab, if they are not defined already. For example, the products which might need to be set up for travel from Mumbai, India to London with a two night stay include:
    - BOMLHR flight redemption
    - LHRBOM flight redemption
    - Five-star hotel (two nights in a twin shared room)
    - Weekend compact car rental

    For more information on creating products, see *Siebel Product Administration Guide* .
2. Create the redemption base prices.

    Define the redemption base prices for the products. The base price lists required for the user travel from Mumbai to London might be as shown in the following table.

Product	Program	Partner	Point Type	Points
BOMLHR flight redemption	My Jet Program	My Jet Airway	Miles	40000
LHRBOM flight redemption	My Jet Program	My Jet Airway	Miles	40000
Five-star hotel (two nights in a twin shared room)	My Jet Program	My Luxury Hotel	Miles	25000
Weekend compact car	My Jet Program	My Car Rental Agency	Miles	2000

Product	Program	Partner	Point Type	Points

Example of Setting Up a Redemption Promotion for a Redemption Package

For general information about creating promotions, see *Setting Up Siebel Loyalty Promotions*

As an example, you might set up a promotion with the following attributes:

- Set the Booking Date as a promotion attribute.
- Create a new Rule: 25% discount on redemption.
- Define the criteria using the following attributes:

```
If Product = BOMLHR, LHRBOM, 2 night twin-share, Weekend Compact Car
```

- Define Action as: `Accrue 25,000 points.`

Setting Up Redemption Packages as Bundled Products

To set up redemption products as a bundled product, complete the steps in the following procedure.

To set up a redemption products as a bundle product

1. Create new redemption products in the Loyalty Administration – Products tab as described in *Example of Setting Up a Redemption Product and Base Price List for a Redemption Package*.

   For more information on creating a product, see *Siebel Product Administration Guide* .
2. Associate the redemption product with a partner.

   The redemption products are associated to the partner in the Partner Product Offering view in the Loyalty Partners tab. You can select the program for which this product is being offered by the partner, the effective dates within which the product is available for redemption to the members, the offer type as redemption, and the pricing type: Points, Points by Distance, or Points by Zone.

   > **Note:** For a bundled product, the pricing type is typically Points.
3. Create a bundle product.

   Define one more product with the Structure Type as Bundle, and associate the products defined in *Example of Setting Up a Redemption Product and Base Price List for a Redemption Package*. If a constituent product type of a bundled product is electronic voucher, then Loyalty issues a voucher for that product when redeeming the bundled product.
4. Define the redemption package base price list for the bundle product.

   Based on the partner product offerings setup for the individual products within the bundle product, you can choose one partner for one price line in the Bundle Product-Points view.

Redemption Loans

Members select redemption products on a Web catalog and redeem their points to obtain the product. In some cases, the members might not have a sufficient point balance and would have to forgo the redemption.

To increase member satisfaction, the loyalty program allows a member to take out a loan to provide the extra points required for the redemption. This facility is similar to a bank providing an overdraft facility to a customer on the customer's bank account. The loan facility is extended only to members who have moved up to higher tiers of the program. The next accrual activity pays back the loan.

The loyalty administrator specifies the maximum loan that members can receive. The actual loan that a member receives is the difference between the redemption price and the member's point balance, if it is less than equal to the maximum loan limit.

The following topics discuss redemption loans:

- *Setting Loan Limits for Tiers*
- *Sequence for Loyalty Credit Check*

Setting Loan Limits for Tiers

When you set loan limits based on tier, the limit is based on the member's primary tier.

You set the limit in two ways:

- **Absolute value.** Specify the maximum number of points that members in this tier can borrow.
- **Percent of point balance.** Specify the number of points that members in this tier can borrow the percentage of the member's outstanding point balance.

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

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

To set loan limits for tiers

1. Navigate to the Loyalty Program Administration screen.
2. Click the Program ID field of the loyalty program that you want.
3. Click the Loans view tab.
4. In the Loans list, add a new record for each combination of point type and tier where you want to allow loans, and complete the necessary fields, described in the following table.

Field	Description
Tier Class	Select the tier class of the tier whose members are allowed to borrow.

Field	Description
Tier	Select the tier whose members can borrow.
Point Type	Select the point type that members can borrow.
% Point Balance	Enter the percent of point balance that is the limit for the loan of this point type to members in this tier.
Absolute Loan Value	Enter the absolute value that is the limit for the loan of this point type to members in this tier.
Basis	This field determines whether the member can borrow the greater or lesser of the values specified in the % Point Balance and Absolute Loan Value fields. Select Maximum to allow members to borrow the greater of the two values, or select Minimum to allow the lesser of the two values.

Sequence for Loyalty Credit Check

The credit check sequence validates whether the member has a sufficient point balance to complete the redemption. If a member gets a loan because the member is in a tier, then the credit check process checks the extent of the maximum loan, and compares it with the redemption price to validate the member has a sufficient point balance. That is, the difference between the redemption price and the member's existing point balance must be less than or equal to the maximum loan possible for the member's tier and point type in which the selected redemption price option is quoted.

When calculating the eligible loan, the credit check sequence takes into account the member's total outstanding loans. For example, consider the following:

- A member's point balance for a particular point type is 1000.
- The price in points to be paid for redemption is 1200.
- The loan limit for the member is 500, with the status of Approved.
- The member's outstanding loan is 300.

The member is eligible to take a loan of 200 points (400 – 300). Because the points shortfall is 200 points (1200 – 1000), the member can proceed with the redemption.

The input parameters to the Credit Check business service are:

- Membership ID
- Redemption Price
- Point Type

The Credit Check sequence performs the following tasks:

1. Compares the point balance with the redemption price.

Based on the membership ID and point type, the process retrieves the member's point balance in the specified point type. It compare the Point Balance with the redemption price in the option selected by the member, to check whether member has sufficient point balance.

For example:

Point Type: FFP (Frequent Flyer Points) Point Balance: 1,000 Redemption price: 1,200 Output: Insufficient balance.

If the balance is sufficient, then the business service calls Siebel Order Management to create a quote with the price option selected.

2. Checks whether a loan is applicable to the member's tier.

   If the balance is insufficient, then the process retrieves the member's tier and tier class, and refers to the Loyalty Program Administration screen, Loan setup to check whether a loan is applicable for the member's tier in the given tier class, and the point type considered for redemption pricing.

   If the loan is applicable, then the process proceeds. If the loan is not applicable, then the process provides a message that the loan is not successful.
3. After verifying that the loan is applicable, the process derives the shortfall by calculating the difference between the redemption price in points and the member's current point balance.

   For example:

   Redemption Price: 1,200 points Point Balance: 1,000 points Shortfall: 200 points
4. Assesses the extent of the loan.

   For example, the loan of Frequent Flyer Points is by tier and by percent of balance. The calculation is as follows:

   Members FFP balance: 1,000 points Member's primary tier: Gold Percentage of Point Balance in Point Type Miles: 40% The loyalty program can provide a maximum loan of 400 points to the member.
5. Derives the value to be compared with the shortfall by comparing the value derived based on percentage of point balance with an absolute value.

   For example: Basis: maximum. Extent of Loan based on Percentage of Point Balance: 400 points Extent of Loan based on Absolute Value: 500 points Maximum of the two: 500 points.
6. Checks whether the loan is sufficient.

   The process compares the maximum applicable loan derived in step 5 with the points shortfall stored in step 3. The shortfall must to be less than or equal to the maximum loan limit for the credit check to be successful.

   For example: Shortfall: 200 Maximum loan limit: 500

   As the shortfall is less than the maximum loan limit, the Credit Check output is: Successful.
7. Creates a loan accrual.
8. Because the credit check is successful, Loyalty business service automatically creates a loan transaction. That is, it accrues the shortfall in points to the member's account, and successfully creates the redemption transaction. The business service calls Siebel Order Management to create a quotation.

Points-To-Pay Conversion

The Siebel Loyalty program provides redemption pricing options to members in points, or points-plus-pay. The member chooses one of the options to pay for the redemption product.

The following topics discuss points-to-pay conversion:

- *About Points-To-Pay Conversion*
- *Setting Up Points-To-Pay Conversion*
- *About Redemption with Conversion Pricing*

About Points-To-Pay Conversion

The points-plus-pay option enables members to use a redemption product despite having an insufficient point balance. For example, redemption prices for a product are 50,000 points or 40,000 points plus $400. A member having only 42,000 points can still use the product by choosing the second option. If a member only has a 30,000 point balance, then loyalty programs can still allow that member to redeem his or her points by providing a loan to the member, as described in *Redemption Loans*. Loans are primarily given to members in elite tiers who have by their past behavior shown loyalty to the program sponsor.

Some loyalty programs do not want to offer loans to their nonelite members (or to any of their members) in case of an insufficient point balance. In these cases, Siebel Loyalty programs offer an option to their members to pay for the difference using a currency.

Points-to-pay conversion and payment in points-plus-pay are mutually exclusive. That is, if you check the flag for points-to-pay conversion at the program level, then Loyalty only displays the payment mode in points while displaying price options. Siebel Loyalty only offers points-plus-pay pricing options to the member if points-to-pay conversion is not allowed for the program.

Loyalty performs points-to-pay conversion for a point type only if:

- The flag for allowing points-to-pay conversion is checked at the program level.
- The member has insufficient point balance for that point type to pay for redemption.
- The loan eligible for the member in that point type is not sufficient to cover the shortfall.

If multiple products are being redeemed in the same request, and points-to-pay conversions are conducted for multiple price lines, then the currency to which the conversion is done (determined by the currency for the Cost per point field in the price setup) is the same for all price lines. If not, Siebel Loyalty issues an error.

Setting Up Points-To-Pay Conversion

The points-to-pay conversion pricing is optional for loyalty programs. To enable points-to-pay conversion, you need to check the points-to-pay field at the loyalty program level. Siebel Loyalty determines whether it is required to convert points to pay based on this field as well as the set of conditions described in *About Points-To-Pay Conversion*. The most basic of these conditions is that the member does not have a sufficient balance even after considering the eligible loan to that member.

The business service, called after a member has selected a price option, checks Loyalty Program Administration to verify whether to convert points to pay. This process then recalculates the pricing and returns a new price in line with the member's point balance. The difference in the initial redemption price in points and the member's point balance is converted to the pay component.

To set up points-to-pay conversion

1. Navigate to the Program Administration screen.
2. Check the Points-to-Pay conversion flag.

   > **Note:** This flag only determines whether points-to-pay conversion is allowed or not; it does not mandate it. The conversion occurs only if conditions warrant it as described in *About Points-To-Pay Conversion*.

   After checking this flag, Loyalty initially show the member's options in points; Loyalty only converts points-to-pay and displays the recalculated options if there is a deficit in points.
3. Populate the Cost per point field in the price line in the redemption base price setup for the product as described in *Example of Setting Up a Redemption Product and Base Price List for a Redemption Package*.

   This field determines the conversion factor from points to currency, and also the currency to which to convert. Not specifying this value results in an error if points-to-pay conversion is attempted for the price line.

About Redemption with Conversion Pricing

The general steps for redemption with conversion pricing is as follows:

1. The member selects an itinerary or product.
2. The loyalty program obtains the redemption price options.
3. The member selects the price option.
4. The loyalty program provides a recalculated price option.
5. The member accepts this price option.
6. Siebel Order Management creates a quote for member acceptance.
7. Siebel Order Management creates the order and redemption transaction.

Step 4 is the unique step in this process. The details of *About Redemption with Conversion Pricing* are described in *About Converting Points to Pay*.

About Converting Points to Pay

To convert points to pay, the Siebel Loyalty's points to pay process completes the following steps:

1. Checks whether the member's point balance is sufficient.

   Once the member selects one of the price options, Siebel Loyalty calls the Convert Points to Pay business service. The business service checks the member's credit and determines whether the member has a sufficient points balance. There are different process flows depending upon the credit check result. If the member has a sufficient point balance, then Siebel Loyalty proceeds to call Siebel Order Management to create a quote.
2. Checks the loan setup for the member tier.

   If the member's point balance is less than the points component of the redemption price, then Siebel Loyalty checks whether there is a loan setup for the member's tier and for the point type in the redemption price.
3. Calculates the extent of the loan.

If there is a loan setup, then based on the setup (minimum or maximum of percentage of current balance, or an absolute value), the process calculates the extent of loan.

4. Checks if the maximum loan is sufficient for the redemption.

   After calculating the extent of the loan, Siebel Loyalty checks whether the maximum loan limit is sufficient. If the required loan is within the maximum loan limit, then Siebel Loyalty creates an automatic loan (accrual transaction) with the loan equal to the difference between the redemption price in points and the member's point balance. It takes the price option selected by the member forward to the create quote process.

5. Checks the points-to-pay conversion.

   If there is no loan setup for the member tier or point type, or the loan required is more than the maximum loan limit, then Siebel Loyalty checks whether a points- to-pay conversion must be performed.

   The points-to-pay conversion pricing is optional for loyalty programs. To enable points-to-pay conversion, you need to check the points-to-pay field at the loyalty program level. Siebel Loyalty determines whether it is required to convert points to pay based on this field as well as the set of conditions described in *About Points-To-Pay Conversion*. The most basic of these conditions is that the member does not have a sufficient balance even after considering the eligible loan to that member.

6. Identifies the pricing line.

   Siebel Loyalty identifies the points pricing line setup in Admin - Products, used for calculating the price option selected by the member.

7. Checks the cost-per-point setup.

   Siebel Loyalty checks whether the cost per point option is set up in the identified points pricing line.

8. Calculates the pay component:

   - If one product is being redeemed for a given point type, then Siebel Loyalty calculates the difference between the redemption price and the member's point balance and multiplies that with the cost per point to get the pay component.
   - If more than one product is being redeemed, then where payment occurs in the same point type, the total shortfall in points for that point type is prorated across the different price lines in proportion to the contribution of each price line to the total points. After the shortfall is prorated across the different price lines, Siebel Loyalty performs a points-to-pay conversion for each price line according to the cost per point defined for that price line.

     For example, assume there are three price lines in the Point type Regular with price options as follows:

     - 200 Regular (price line 1)
     - 300 Regular (price line 2)
     - 500 Regular (price line 3)

     In this example, the total price in points required for payment is 1000 Regular points. Now if the member's point balance for that point type is 600 points, and the eligible loan is insufficient to cover the shortfall of 400, then Loyalty converts the 400 point shortfall as follows:

     - 200/1000 times 400 equals 80
     - 300/1000 times 400 equals 120
     - 500/1000 times 400 equals 200

     Siebel Loyalty uses the conversion factor defined in each of the price lines to convert 80, 120, and 200 points to their currency equivalents. The total value to be paid in currency for the redemption request is the sum of these three currency components.

- If there are multiple price lines and multiple point types, then:
  - The points-to-pay conversion is done for a point type only if the conversion currency (the final currency to which to convert) is the same for all price lines involving that point type.
  - If there are price lines in multiple point types and there are multiple point types requiring points-to-pay conversion, then the conversion currency has to be the same for all point types.

  If either of these conditions are not satisfied, then Siebel Loyalty reports an error condition.

9. Returns the new price option:

   The business service returns the new price option for the member to accept. After the member accepts the price option, the business service calls Siebel Order Management to create a quote.

Bidding for a Redemption Product

Members can bid for a redemption product using their accrued points. Loyalty programs might set up the bidding to promote products, or to promote a new partner or a partner's new product. The member that places the highest bid within the stipulated time period gets the redemption product.

Setting up a bid is done outside of Siebel Loyalty, in a third-party product. For a bid, Siebel Loyalty takes the price to be charged as an input and charges the member that amount in points, or points plus pay. A bid transaction has to have the Bid flag in the transaction record set to Y (Yes) to indicate that it is a bid transaction.

Siebel Loyalty does not issue a loan nor does it perform a points-to-pay conversion for a bid transaction.

> **Note:** A bid transaction only occurs through third-party UIs, that is, through Loyalty Web Services. If multiple transactions are involved in a redemption request, then either all or none of the transactions are bid transactions.

Redemption Scenario for a Bid

In this scenario of redemption process for a bid, members of a loyalty program bid for a product available in a bidding promotion. The third-party system needs to store the various bids submitted within the stipulated time period. The highest bid is then selected and sent to Siebel Order Management and Loyalty to create an order and redemption transaction.

1. The member selects the bid product.

   The member logs on to the loyalty program Web site to participate in the bid promotion and selects the redemption product.
2. The member submits the bid price.

   The member completes the terms and conditions of the bid (minimum bid price, number of bids which can be submitted by a member, bid submission period, and so on), and submits a bid price.
3. The third-party system stores the bid price.

   The third-party system stores the various bids submitted by the members.
4. The third-party system runs the bid selection process:

   After the last date for a bid submission, the third-party system runs a selection process which compares the various bids and selects the highest bid.

5. The third-party system creates a quotation.

   The third-party system passes the highest bid to Siebel Order Management to create a quotation. In the bidding process, the third-party system sends the parameters to Siebel Order Management, that includes the program name, product, partner, membership ID, redemption price in points (or points plus pay), and so on.
6. The third-party system gets the member's acceptance.

   The third-party system can display and send the quotation to the member for acceptance (if taxes are applicable). If directed by the terms and conditions of the bid, then it directly calls the Loyalty business service to do a credit check.
7. Siebel Loyalty performs a credit check.

   Siebel Loyalty performs a credit check to ascertain the member account having sufficient point balance.
8. Siebel Order Management creates the order and redemption transaction.

   Siebel Loyalty calls Siebel Order Management to create an order. After it generates the order, Siebel Order Management calls the Loyalty business service to create a redemption transaction. Based on the bid product, Siebel Loyalty determines whether to ship a product, send a voucher, or dispatch an air redemption ticket. For more information on order processing and order management, see *Siebel Order Management Guide* .

Batch Redemption Process

Batch redemptions are run periodically to:

- Redeem all the outstanding points of all members of a program whose point balance is greater than or equal to the threshold set up under the program.
- Give each member a voucher based on the member's point balance. Optionally, you can give vouchers only to members who have more points than a required minimum.
- Reset each member's point balance to zero.

A supermarket chain rewards members for their shopping by giving them points. At the end of the month or any specific period, it converts all the points to dollars and issues vouchers to its members. This process applies only to members whose point balance is greater than or equal to 500 points.

Related Topics

Setting Up Batch Redemption

Specifying the Threshold for Batch Redemption

Setting Up Batch Redemption

The following procedure provides a high-level overview of how to set up a batch redemption.

To set up batch redemption

1. Specify the minimum number of points required for member to be considered for batch redemption process in the Batch Redemption view of the loyalty program. For more information, see *Specifying the Threshold for Batch Redemption*.

2. Set up the product that is used to create batch redemption transactions for members. Set up the product with *Loyalty Batch Redemption* as the value in the Type field. For more information about setting up products for redemptions, see *Setting Up Products for Redemption by Siebel Loyalty*.
3. Set up a promotion that assigns the voucher to members. This promotion must use the following values:

    a. In the Rule record, in the Apply To field, select Bulk Redemption.
    b. In the Action record, complete the necessary fields, described in the following table:

Field	Description
Type	Select *Issue Bulk Voucher*.
Product Type: Voucher	Select an item from the picklist, which shows products of the type Electronic Voucher.
Voucher Value Conversion: Operator	Select the operator used to convert the voucher value to an absolute value. For example, select *Multiply*.
Voucher Value Conversion: Value	Select the value used to convert the voucher value to a cash value. For example, if you multiply the number of points in the voucher by .1 to convert it to an absolute value, then select Multiply in the *Operator* field and .1 in the *Value* field.
Voucher Value Conversion: Currency	Select the currency used to convert the voucher value to an absolute value.
Voucher Value Conversion: Cost Per Point	If you allow points-to-pay conversion, then enter the amount that customers must pay for each point they are short. For more information, see *Points-To-Pay Conversion*.

    For more information about setting up promotions, see *Process of Creating Loyalty Promotions*.
4. Schedule the batch redemption workflow, LOY Batch Redemption Process, so it runs at the required frequency.

    For more information about administering workflow processes, see *Siebel Business Process Framework: Workflow Guide* .

This workflow creates the redemption order and transaction for the loyalty engine to process.

After the transaction is processed, members are assigned vouchers, which appear as records in the Loyalty Members screen, Vouchers view for each member.

Specifying the Threshold for Batch Redemption

When you set up batch redemption, set up the minimum threshold for receiving an award. For more information, see *Setting Up Batch Redemption*.

To specify the period for a batch redemption

1. Navigate to the Loyalty Program Administration screen.
2. In the Programs list, click the name of the program that uses this batch redemption.
3. Click the Batch Redemption view tab.
4. In the Batch Redemption view, complete the necessary fields, described in the following table.

Field	Description
Point Type	Select the point type used by the batch redemption.
Threshold	Select the minimum number of points that the member must have to receive a voucher.

Addressing Concurrent Redemption Transactions

Concurrent redemptions occur when two redemption transactions are processed by the Loyalty engine at the same time. Concurrent redemptions may result in a member having a negative point balance, if the member does not have enough points to redeem for both the redemption transactions.

Even if each of the concurrent redemptions is smaller than the member's balance in the point type, the two redemptions combined might be greater than the member's balance. Because the redeemed points are consumed only when the Loyalty engine writes to the database, the engine might approve both transactions without realizing that the two combined use more points than the member's total balance.

If you choose to prevent redemption concurrency, then transactions of the type Redemption and the subtype Product are validated and processed using a business component whose fields are validated before being written to the database, to check whether the total points redeemed by a member are greater than that member's point balance. If a transaction is not valid, then it is rejected with an error message saying that another redemption transaction is being processed for the member.

> **Note:** This behavior is specific to redemption processing, and it does not affect other flows, such as accrual processing or tier processing. If the action Redeem Points is used in an accrual promotion or tier promotion, then concurrent redemptions cannot be prevented.

This feature is made optional because it can potentially slow performance. By default, this feature is switched on, but you can turn it off, if you do not need it. This feature is controlled by the user property Redemption Concurrency in the LOY Processing Engine business service. Leave the default value of Y if you want to avoid redemption concurrency.

Methods to Calculate Loyalty Redemption Price

There are two methods used to calculate loyalty redemption price:

- **GetPriceOptions Method.** Calculates the redemption price based on both the product setup and promotions that apply, if any.
- **RedemptionBasePrice Method.** Calculates the redemption price based only on the product setup, not on promotions. It calculates the price based on the Points, Points By Zone, or Points By Distance view for the product. The RedemptionBasePrice method provides faster performance, but only use it if you are sure that the no promotions apply to the redemption, so the price can be calculated based only on the product setup.

Both of these methods are in the LOY Redemption Web Service. For more information, see *Siebel CRM Web Services Reference* .

8 Using Siebel Loyalty with Partners

Using Siebel Loyalty with Partners

This chapter gives you background information about how partners use Siebel Loyalty and explains the tasks that you perform at the brand owner company in order to manage partners. This chapter includes the following topics:

- *About Partner Use of Siebel Loyalty*
- *Overview of Partner Use of Siebel Loyalty*
- *Scenario for Partner Use of Siebel Loyalty*
- *Entering the Loyalty Partner Program Profile*
- *Creating Joint Promotions with Partners*
- *Mapping Zones and Cities to Airports*
- *About Selling Loyalty Points to Partners*
- *About Using Redemption Vouchers*
- *Sending Transactions to Partners for Review*
- *Sending Accrual Disputes to Partners for Review*
- *Managing Loyalty Partners' Rejected Transactions*
- *Exposing Additional Views to Partners*
- *Managing Partner Fees and Point Balances*
- *Generating Partner Statements*
- *Setting Up Loyalty Terms for Precalculated Accruals*

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 might allow members to earn frequent flyer points by doing business with partners that are hotels, car rental companies, financial institutions, and retailers.

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

The host company uses the Loyalty Partner Portal to interact with its partners by sharing member information, jointly creating promotions, reviewing and editing transactions, and managing partner fees and point balances. The Loyalty Partner Portal enables the host company to provide a simple interface to partners without worrying about the technical requirements of the client.

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 enables 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 representatives use, 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 and Maintaining Member Information.** Partners can enroll members and capture members' profile, much as your own MSRs do. For more information about enrolling members, see *Enrolling Members in Loyalty Programs*.
- **Managing Member Transactions.** Partners can manage member transactions in many of the same ways that your MSRs do. For more information about managing member transactions, see *Entering Loyalty Members' Orders*.
- **Collaborating On Loyalty Promotions.** Partners use the Partner Portal to collaborate on Loyalty Promotions. For more information, see *Creating Joint Promotions with Partners*.
- **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 Installation and Administration Guide* .

Scenario for Partner Use of Siebel Loyalty

This scenario gives one example of how partners might use Siebel Loyalty. Your partners might use Siebel 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 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.

This information is available to either a host company employee using the Loyalty application or the member through the eLoyalty Member Portal, in addition to being available to the partner through the Loyalty Partner Portal.

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.

The Partner Approves Disputed Transactions

The accrual disputes raised by the users are directed to the partner for approval of the partner, if required.

The partner can view and approve or reject these transactions before further processing.

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*.

Adding Programs to the Partner Program Profile

The following procedure describes how to add programs to the partner program profile.

To add programs to the partner program profile

1. Navigate to the Loyalty Program Administration screen.
2. Identify the program to which you want to add partners, and click its Program Id hyperlink.
3. Click the Programs Hosted view tab.
4. On the Partners list, click New.
5. In the Add Partner dialog box, select a partner to associate with this program and click OK.

Viewing the Partner Program Profile

The following procedure describes how to view the partner program profile.

To view the partner program profile

1. Navigate to the Partners screen.
2. In the link bar, click Partner List.
3. Identify the partner company whose profile you want to view and click its Partner Name hyperlink.
4. Click the Partner of Programs view tab.

   The Partner of Programs list displays a record for each of the partner's loyalty programs. Some fields are described in the following table.

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

Creating Joint Promotions with Partners

You create 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 Installation and 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*, and enter the following data:
  - **Promotions Based on Transactions with Only the Partner.** When you create the rule for the promotion, choose the partner as one of the criteria in a promotion rule, so the promotion applies only to members' transactions with this partner. If the promotion could apply to multiple partners, then enter in multiple partners as promotion criteria.
  - **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 as criteria, so the rule applies 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 promotion that gives a member a bonus based upon completing purchases from both the host company and the partner, as described in *Example of Creating a Joint Promotion*. This promotion is a joint promotion, defined so the member must have transactions with both the partner and the host company to get the bonus.
- **Partner Approves the Promotion.** If the partner must approve the promotion, then they can do so by going to the Loyalty Promotions view of the Partner Portal and selecting Partner Approved in the Partner Status field.

This field shows that the partner has approved the promotion, but the promotion is not active and does not apply to transactions until a host company employee activates it.

- **Sell Points to the Partner.** You might 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 *About Selling Loyalty Points to Partners*.
- **Activate the Promotion.** After getting approvals and selling additional points to the partner, as needed, the host activates the Promotion by selecting it and clicking Activate in Promotion Administration view.

Mapping Zones and Cities to Airports

A promotion can have rewards for members who complete trips or round-trips between two cities, and each of these cities might have one or more airports.

A promotion can also have rewards for members who complete trips or round-trips between two zones, and each zone might include multiple cities and multiple airports.

All Loyalty implementations for airlines must create lists of values for all the airports in your loyalty program. Optionally, if you reward members for travelling between cities and zones, then you also create lists of values for cities, and you enter the zones for a given partner. You also map the airports to cities and zones for a given partner. Then that partner can give rewards for traveling between cities or zones.

For example, the airport code SFO (and the codes for other San Francisco airports) could be mapped to the city of San Francisco, if a partner has a reward for round-trips between New York and San Francisco. The airport code SFO (and the codes for other airports on the west coast) could be mapped to the zone West Coast, if a partner has a reward program for round-trips between the East Coast and the West Coast of the United States.

First, you create the lists of values for the airports and cities, as described in *Defining Loyalty Airport and City Codes*. Then you create codes for zones, and you map the cities and zones to the airports, as described here. This mapping applies to all programs and promotions for this partner.

When customer service representatives create transactions, as described in *Entering Loyalty Members' Transactions*, after they select the origin airport and destination airport, they can see the origin city, origin zone, destination city, and destination zone in the Transaction form.

To map zones and cities to airports

1. Create a code for a zone as follows:
   a. Navigate to the Partners screen, Partner List view.
   b. In the Partners list, click the Partner Name hyperlink for the appropriate partner.
   c. Click the Zones view tab.
   d. Add a new record, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Zone Code	Enter the code for the zone.
Zone Name	Enter a name for the zone.

Field	Description

2. Click the Airport-Zone Map view tab.
3. Add a new record to the Airport-Zone Map list for each airport that you want to map, and complete the necessary fields, described in the following table.

Field	Description
Airport Code	Select the code for the airport being mapped to a city and zone.
Zone Name	Select the code for the zone being mapped to this airport.
City	Select the code for the city being mapped to this airport.

About Selling Loyalty Points to Partners

Partners must purchase points from the host company, so they can give those points to members who make purchases from them.

When a partner submits a transaction that earns points for a member, those points are deducted from the point balance for that partner (calculated by the partner account debit conversion rate), as tracked by point blocks. If the partner does not have enough points to give to the member, then the transaction is rejected.

The host company charges points to the partners in two ways:

- **Prepaid.** The partners buy point blocks before members earn the points. A point block representing the amount of points purchased is created and activated. When a partner's prepurchased point balance is low, the host company sells additional points to the partner. If the host company wants to prevent members' transactions from being rejected if the partner mistakenly fails to purchase additional points in time, then the host company can create and activate a reserve point block that is only used if the prepurchased point block runs out of points. If the reserve point block is used, then the host company charges the partner for these points as well as for another large point block. The host company can also set up auto-creation of point blocks for prepaid members, as described in *Setting Up Auto-Creation of Point Blocks*, so a new point block is created automatically when the existing point block runs out of points.
- **Post-Paid.** The partner pays for points only after the points have been given to members. The host company bills the partner after the points are used. For example if the partner is billed on a monthly basis, then the partner would be charged only for the points that it gave to members since the last billing.

For prepaid partners, the partner manager can view the information for the partner in the Point Block Purchases view of the Partners screen. The partner manager changes the status of the point block 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.

Related Topics

Selling Points to Prepaid Partners

Selling Points to Post-Paid Partners

Selling Points to Prepaid Partners

For prepaid partners, you begin by making the point block available for purchase. After the partner has purchased a point block, you activate it so the partner can use it.

Before you sell the points to prepaid partners, you must create the point blocks, as described in *Creating Point Blocks for Loyalty Programs*. You also have the option of setting up auto-creation of point blocks, as described in *Setting Up Auto-Creation of Point Blocks*.

Making the Points Available to Purchase

For prepaid partners, you begin by making the points available to purchase.

> **Note:** You can also make points available for partners to purchase in the Loyalty Program Administration screen, Points Blocks view. Point blocks are point type independent.

To make points available for partners to purchase

1. Navigate to the Partners screen, Partner List view.
2. In the Partners list, select the partner company that you allow to purchase this point block.
3. Click the Partner Name field's hyperlink.
4. Click the Point Blocks view tab.
5. Add a new record to the Point Blocks list, and complete the necessary fields.

Activating the Point Block for Prepaid Partners

After a prepaid partner has purchased the point block, you activate it so it is available for the partner to use.

To activate points so they can be used by prepaid partners

1. Navigate to the Partners screen, Partner List view.
2. In the Partners list, select the partner company whose payment for the points you have received.
3. Click the Partner Name field's hyperlink.
4. Click the Point Blocks Purchases view tab.
5. If necessary, use a query to find Point Blocks with the status Submitted for Approval.
6. In the Status field, choose Approved.
   These points can be given to members who have transactions with this partner.

Selling Points to Post-Paid Partners

Post-paid partners pay for points after they are used.

At the end of each billing period, you bill the partner based on how many points the partner gave to members during the period.

Setting Up Partner Billing Rates

For each post-paid partner, specify the rate that you charge for each type and subtype of point that the partner uses. You can also enter different rates for one type and subtype for different periods of time.

To set up a partner's billing rates

1. Navigate to the Loyalty Program Administration screen.
2. Drill down on the name of the Program Id field of the program that the points are used in.
3. Click the Partners view tab.
4. In the Partners list, select the record for the appropriate partner.
5. Scroll down and click the Billing Rates view tab for that partner.
6. Add a record to the Billing Rates list for each type and subtype of point that the partner uses, and complete the necessary fields, described in the following table.

Field	Description
Start Date	Enter the date when this billing rate becomes effective.
End Date	Enter the date when this billing rate is no longer effective.
Point Type	Select the point type this rate is charged for.
Point Subtype	Select the point subtype this rate is charged for.
Price	Enter the price per point.
Currency	Enter the currency for the price.
Billing Percentage	Enter a billing percentage, the rate to be charged to this partner. For example, if you enter a billing percentage of 90, then the partner is only charged 90% of the price entered in the Price field.
Operating Carrier	For airline loyalty programs only, select the carrier that provides the flights that these points can be exchanged for.

Generating Bills

To generate bills for a partner, you click the Generate Billing button, which opens a dialog box where you specify the start date and end date for the bill.

After bills are generated, any future bills do not include transactions that have already been included in past bills. If you generate a new bill for the same period as an earlier bill, or for an overlapping period, then the new bill only includes transactions that were not included in earlier bills.

The bill is calculated as follows:

```
Partner Bill for selected Period=
(Points for all accrual transactions of the partner processed in this period - Transactions canceled) *
 Price for each point type, sub type and operating carrier combination * billing percentage
```

To generate a bill

1. Navigate to the Loyalty Program Administration screen.
2. Drill down on the name of the Program Id field of the program that the points are used in.
3. Click the Partners view tab.
4. In the Partners list, select the record for the appropriate partner.
5. Click Generate Billing.
6. In the dialog box, enter the start date and end date of the billing period, and click Submit.

Viewing Generated Bills

You view the generated bills in the Partners screen, and you use them to bill your partners.

To view generated bills

1. Navigate to the Partners screen, Partner List view.
2. Drill down on the name of the appropriate partner.
3. Click the Statements view tab.
4. Query for Partner Billing in the Statement Type field and for the appropriate dates in the Start Date and End Date field.

About Using Redemption Vouchers

For partner redemptions, a member quotes the voucher number as a form of payment for activities such as a room booking, or a car rental. The partner validates the activity with loyalty program operations, which then manually change the voucher status to: Reserved. This status prevents the member from quoting the voucher number to another partner to obtain a redemption product. Once the member presents the voucher to avail the redemption to the partner, the partner contacts Loyalty Program Operations in real time or sends a batch of availed redemption transactions to change the status of the vouchers to Availed or Used.

Related Topics

Points-To-Pay Conversion

Voucher Revenue Recognition

Sending Transactions to Partners for Review

Some transactions need to be reviewed and approved by partners. For example, the host company might send transactions to a partner for approval if the companies are running a type of joint promotion that requires the partner's explicit approval of transactions, or a transaction might be rejected by the Loyalty Engine so the partner must edit the transaction's information before submitting it for reprocessing.

When you create these transactions, you must select the partner employee who must 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 sent back and forth between Loyalty and the partner's external application. This option requires integrating Loyalty with the third party application.

To submit a transaction to a partner for review

1. Navigate to the Loyalty Transactions screen.
2. In the Transactions list, select the transaction to be reviewed by the partner.
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.
5. In the Pick Employee dialog box's To Employee field, select the partner reviewer and click Send.

> **Note:** Check the transaction's Status field later to see whether the partner has approved or rejected it.

Sending Accrual Disputes to Partners for Review

The host company can enter accrual disputes, as described in *Entering Accrual Disputes*.

Whether or not all accrual disputes are sent to the partner for review depends on the loyalty terms you set up for that partner.

If all accrual disputes are sent to the partner for review, then the partner can receive the dispute for review in two ways:

- **Through the Partner Portal.** When the partner reviews transactions in the Transactions Approval view of the Transactions screen of the Partner Portal, disputed transactions have the status of partner pending. The partner can select the status Acceptable or Rejected.
- **Through an XML File.** The host company can schedule the LOY EAI Export Transactions workflow to run in the background, and this workflow exports transactions in Partner Pending Status in to eaitransactions.xml, which is sent to Partners for review. Partners modify this xml file by setting the Status of transactions to Acceptable or Partner - Rejected, and they sent it back to the host company. The host company imports these transactions back into the system.

To send all accrual disputes to a partner for review

1. Navigate to the Partners screen, then the Loyalty Terms view for the partner company.
2. Select the program, and complete the necessary fields, as described in the following table.

Field	Description
Validate Dispute	Select this check box.
Submit To	Select the partner reviewer who must approve disputed accruals.

Field	Description

Managing Loyalty Partners' Rejected Transactions

Partner's Loyalty transactions can be rejected for a number of reasons.

For example, partners purchase point blocks. When they give points to a member, these points are deducted from the partner's point block. If a partner no longer has enough points to cover a transaction, then that transaction is rejected.

The host company must manage these rejected transactions.

Identifying and Commenting on Rejected Transactions

The host company's loyalty administrator must query periodically to identify rejected partner transactions. The Loyalty Processing Info view gives details on why the transaction was rejected. If desired, a host company employee can also enter a note on the transaction explaining why the transaction was rejected. Then the loyalty administrator must enter a note explaining why the transaction was rejected.

To identify and comment on rejected transactions

1. Navigate to the Loyalty Transactions view.
2. Run a query with the following values:
   a. Status: Rejected.
   b. Partner Name: The name of a specific partner.

   All rejected transactions for that partner appear.
3. For each rejected transaction:
   a. Navigate to the Loyalty Transactions screen, Processing Info view and look at the Processing Error Info field to determine why the transaction was rejected.
   b. Navigate to the Loyalty Transactions screen, Notes view and enter a note explaining why the transaction was rejected.

Resubmitting Rejected Transactions (Partner)

The partner must review pending transactions periodically in order to identify and fix rejected transactions.

To resubmit rejected transactions

1. In the Partner Portal, navigate to the Loyalty Transactions view.
2. Query to find all transactions with the status Rejected*.
3. For each of these transactions:
   a. Change the transaction's status from Rejected* to In Progress.

b. Make any necessary changes to the transaction.
c. If desired, enter an explanation of the changes in the Loyalty Transactions screen, Notes view.
d. In the Submit To field, select the partner's designated employee.
e. Change the transaction's status to Submitted.

Exposing Additional Views to Partners

You might want to make additional views visible to your partners.

The views that are visible to any user are controlled by that user's responsibility. Partners have the responsibility *Loyalty Partner Representative (LPR)*. To make views visible to your partners, add the views to this responsibility. For more information, see *Siebel Security Guide* .

Managing Partner Fees and Point Balances

Because of an agreement with the partner, a host company can charge a partner fees for various transactions and services for a given loyalty program. Fees can include either a currency or points. Fees that have been wrongfully applied can also be refunded. Fees applied in points are refunded as a credit to the partner's point balance.

The host company can use the Loyalty Partner Portal to adjust a partner's point balance by debiting or crediting points to any active point blocks.

Adjusting a Partner's Point Balance

A partner's point balance is credited at the time points are purchased and debited when members accrue points with the partner. Numerous blocks of points having different expiration dates and sales prices are created at the time of credit. When members accrue points, these point blocks are debited based on a pricing rule, with the earliest expiration dates debited first. These point blocks require adjustment if there are errors in crediting or debiting point balances.

Debiting a Partner's Point Balance

The following procedure describes how to debit a partner's point balance.

To debit a partner's point balance

1. Navigate to the Partners screen, Partner List view.
2. In the Partners list, identify the partner company whose point balance you want to adjust.
3. Click the Partner Name field's hyperlink.
4. Click the Partner Transactions tab.
5. On the Partner Transactions list, create a new record, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Transaction Date	Enter the date of the transaction.
Program Name	Enter the name of the program.
Type	Select Adjustment from the drop down menu.
DR/CR	Select Debit.
Points	Enter the amount of points to be debited from the point block. **Note:** Points entered as fees cannot exceed the points available in the selected point block.
Point Block	Enter the Point Block.
Description	Enter a description of the transaction.

Note: Once an adjustment transaction has been saved, it cannot be edited or deleted.

Crediting a Partner's Point Balance

The following procedure describes how to credit a partner's point balance.

To credit a partner's point balance

1. Navigate to the Partners screen, Partner List view.
2. In the Partners list, identify the partner company whose point balance that you want to adjust.
3. Click the Partner Name field's hyperlink.
4. Click the Partner Transactions tab.
5. On the Partner Transactions list, create a new record, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Transaction Date	Enter the date of the transaction.

Field	Description
Program Name	Enter the name of the program.
Type	Select Adjustment from the drop down menu.
DR/CR	Select Credit.
Points	Enter the amount of points to be credited from the point block. **Note:** Points entered as fees cannot exceed the points available in the selected point block.
Point Block	Enter the Point Block.
Description	Enter a description of the transaction.

Note: Once an adjustment transaction has been saved, it cannot be edited or deleted.

Charging Partner Fees in Points

Because of an agreement between the partner and the host company, the host company can charge the partner fees, either in points or currency, for delayed or erroneous transactions.

Fees charged in points are recorded in the partner's point balance while fees charged in currency are subject to payment processing.

To charge partner fees in points

1. Navigate to the Partners screen, Partner List view.
2. In the Partners list, identify the partner company whose point balance that you want to adjust.
3. Click the Partner Name field's hyperlink.
4. Click the Partner Transactions tab.
5. On the Loyalty Transactions list, create a new record, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Transaction Date	Enter the date of the transaction.

Field	Description
Program Name	Enter the name of the program.
Type	Select Fee from the drop down menu.
DR/CR	Select Debit.
Points	Enter the amount of points to be debited from the point block. **Note:** Points entered as fees cannot exceed the points available in the selected point block.
Point Block	Enter the Point Block.
Description	Enter a description of the transaction.

Note: Once an adjustment transaction has been saved, it cannot be edited or deleted.

Charging Partner Fees in Currency

Charging fees in currency is handled outside of Siebel Loyalty. To charge fees in a currency, you must create an order in Siebel Order Management. A list of fee transactions can be generated using Oracle Business Intelligence and sent as an attachment along with the order. For more information, see *Siebel Order Management Guide* .

Refunding Partner Fees in Points

A host company can refund point fees that might have been wrongly applied to a partner.

To refund partner fees in points

1. Navigate to the Partners screen, Partner List view.
2. In the Partners list, identify the partner company whose points you want to refund.
3. Click the Partner Name field's hyperlink.
4. Click the Partner Transactions tab.
5. On the Partner Transactions list, select the fee transaction that you want to refund.
6. Enter the Reason code and then click Refund.

Note: Once a refund transaction has been saved, it cannot be edited or deleted.

Generating Partner Statements

The host organization communicates with its partners the details of partner activities through partner statements. A partner statement includes information about the member's transactions, beginning and closing point balance, redemption transactions, accrual transaction debits, and credits for points purchase. Marketing materials also are often sent with statements and include important messages or updates about the loyalty program.

Partners can receive statements by mail, by email, or through the partner portal, depending on their communication preference. You can also generate statements manually at the partner's request.

To generate partner statements

1. Navigate to the Loyalty Statements screen, Partner Statements.
2. In the Partners list, select the partner and click its Partner Number (#) hyperlink.
3. In the Partner form, click Generate Statement.
4. In the dialog box, enter the start date and end date for the statement, and click Submit.

   An electronic record of the statement is created.

Setting Up Loyalty Terms for Precalculated Accruals

Some partners precalculate the points to be credited to members and send them together with the accrual activity details. These precalculated accrual transactions specify the member to be credited, the point type, and the number of points. There are limits on the number and type of points that can be precalculated.

The loyalty terms indicate if a program is eligible for precalculated accrual, and define the accrual parameters.

To set up loyalty terms for precalculated accruals

1. Navigate to the Partners screen, then the Loyalty Terms view for the partner company.
2. Select the program, and complete the necessary fields, as described in the following table.

Field	Description
Precalculated Accrual	Select this check box to enable precalculated accruals for this program.
Accrual Validity Length and Accrual Validity UOM	Enter the length and unit of measure (UOM) for the accrual validity period. For example, if the period is six months, then the length is 6 and the UOM is Month.
Allow Negative and Credit Limit	If you want to allow transactions that cause the partner to have a negative point balance, then select this check box and enter the maximum credit limit, in points.

Field	Description
Reorder Limit	Enter the number of points to trigger reordering.
Accrual Effectivity In Days	Enter the maximum number of days, counting from the transaction date, within which the partner must notify the host of the transaction.
Skip Validations	Select this check box if validation is not required.
Validate Dispute Flag	If you want to validate disputed transactions, then select this check box.
Submit To	Select the partner reviewer who must approve this transaction.

Note: Precalculated accruals can only be credited to a specific member. Any associated parent accrual type is ignored.

Setting Up Loyalty Partner Product Offerings

You can create time-limited product offerings by associating products to partners for accrual and redemption. Each product offering has an associated accrual template, which ensures that partners send the mandatory information that is required for each transaction, to process accruals and to prevent duplicate transactions.

For example, the template for a flight transaction might require the following data elements:

- Membership name and number
- Date of flight
- Origin and destination of flight
- Flight number

Setting Up Accrual Templates

The following procedure describes how to set up accrual templates.

To set up accrual templates

1. Navigate to the Loyalty Program Administration screen, Programs view, click the Program Id hyperlink for the partner program, then click the Accrual Template tab.
2. To add a template, click New, then enter the name and description.
3. Select attributes for the template.
4. For each attribute, select whether you want a Mandatory Check or a Duplicate Check.

Setting Up a Loyalty Product Offering

The following procedure describes how to set up a loyalty product offering. You can specify the pricing method for each product offering: points, points by zone, or points by distance.

To set up a loyalty product offering

1. Navigate to the Loyalty Program Administration screen, Programs view, click the Program Id hyperlink for the partner program, then click the Partners tab.
2. Click the row for the partner you want to work with, then click the Loyalty Product Offerings tab.
3. For each product you want to add, click New, then complete the necessary fields. Some fields are described in the following table.

Field	Description
Product	From the picklist, select the product for accrual, then click OK.
Start Date	Enter the earliest date for this product.
End Date	Enter the last date for this product.
Offer Type	Choose from two options: Accrual or Redemption.
Accrual Template	Select a template from the picklist.
Pricing Method	Choose from three options: Points, By Zone, or By Distance.

Setting Up Precalculated Accruals

Precalculated accrual lets you set up a limit on the points that a partner can send in a single transaction in a defined time period. For example, points that can be credited directly to the member's account, without further validation by the host organization. Loyalty terms validation skip flag enables you to prevent further validation.

You must specify a date range and point limit for each point type that can be precalculated.

To set up precalculated accruals

1. Navigate to the Loyalty Program Administration screen, Programs view, click the Program Id hyperlink for the partner program, then click the Partners tab.
2. Click the row for the partner you want to work with, then click the Precalculated Accrual tab.
3. For each point type you want to add, click New, then complete the necessary fields. Some fields are described in the following table.

Field	Description
Point Type	From the picklist, select the member point type, then click Pick.

Field	Description
Start Date and End Date	Choose the range of dates when transactions can be processed.
Single Transaction Limit	Enter the maximum number of points that can be processed in a single transaction.

Setting Up Unified Point Type for Partner Account Debit

Members can accrue points in more than one point type, but you can convert these multiple point types to a single, unified point type that is used to debit the partner account. For example, a member might accrue both Status Credits and Frequent Flyer Points, while the partner is only charged in Frequent Flyer Points. For each member point type, you must specify the conversion rate for converting member points to partner points.

To set up partner account debit for precalculated accruals

1. Navigate to the Loyalty Program Administration screen, Programs view, click the Program Id hyperlink for the partner program, then click the Partners tab.
2. Click the row for the partner you want to work with, then click the Partner Account Debit tab.
3. For each point type you want to add, click New, then complete the necessary fields. Some fields are described in the following table.

Field	Description
Point Type	From the picklist, select the member point type, then click Pick.
Conversion Rate	Enter the rate for converting member points to partner points.

9 Member Self-Service with Siebel eLoyalty

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:

- *About Siebel eLoyalty*
- *Overview of How Members Use Siebel eLoyalty*
- *Scenario for a Member Using Siebel eLoyalty*
- *Troubleshooting the Display of the Catalog and Products to Loyalty Members*

About Siebel eLoyalty

Siebel eLoyalty is a customer portal that gives members direct access to the loyalty program.

Siebel eLoyalty can reduce the workload of your member service representatives. Customers can use Siebel eLoyalty to enroll with the host organization or its partners to become members of various programs. Existing members can use Siebel eLoyalty to perform various activities by themselves, rather than calling member service representatives.

Siebel eLoyalty is integrated with Siebel Loyalty. Any information that a member enters in eLoyalty is stored in the same way as the information that a member services representative enters in Loyalty. Any information entered using one channel immediately appears in the other channels as well, so eLoyalty, Loyalty, and the Partner Portal always work together.

For example, if a member uses eLoyalty to enroll in a program or promotion, then 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 would with any information about members. For information about giving members access to Siebel eLoyalty, see *Setting Up Customer Access to Siebel eLoyalty*.

Overview of How Members Use Siebel eLoyalty

When nonmembers 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 the member's own membership, such as the Member Number (#), the programs the

member is enrolled in, the member level, the date he or she became a member, the member type, the point balance, and special status, if any).

- **Enter and edit profile information.** View, enter, and edit their membership information.
- **Buy products.** Browse the product catalog to buy products and see how many points they can earn by buying these products.
- **Redeem points.** Browse the product catalog to buy products by redeeming points that they have already earned.
- **Transfer points**. Give a specified number of points to another member.
- **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.
- **Check member attribute and promotion attribute values.** View the values of all member and promotion-specific attributes that have been designed to be shown to members.
- **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
  - Current Tier(s)
  - Next Tier(s)
  - Lounge Membership
  - Profile Data
  - Membership Cards

Scenario for a Member Using Siebel eLoyalty

This scenario gives one example of how members might use Siebel eLoyalty. Your members might 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 Enroll for Myself. 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 time defined summary of the member's point balance, current tier, points needed to reach the next tier, and other items.

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 eLoyalty, sees a promotion that gives double points for purchases made during the week before Thanksgiving. Since the member is planning to buy groceries that week, the member enrolls in the promotion.

The Member Buys Products

On the home page, the member clicks Buy/Redeem products and receives a list of products that can be bought through the Web site. The member browses through the catalog and sees that bonus points are available for buying a cloth shopping bag with the supermarket's logo. The member buys this product.

The Member Checks Promotion Attribute Status

One promotion in which the member is enrolled gives members a 500-point bonus for purchasing five turkeys over a six month period. To see how many have been purchased as of today, the member clicks the link to see a list of attributes. The portal shows that the member has purchased four of the five required turkeys.

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.

The member chooses a one night stay at a local hotel. The member can specify whether to pay for the transaction entirely with points or with a combination of points and cash using a credit card. The member puts this one night stay product in the Shopping Cart, completes the order, and receives a confirmation number and an explanation of how the order will be fulfilled.

The Member Transfers Points to Another Member

After accumulating points, the member wants to transfer some of the point balance to another member. On the eLoyalty home page, the member clicks the My Profile link, then clicks the My Point Transfers link. In the Point Transfers view, she specifies the member number of the member who receives the points, the number of points to transfer, and the type of points to transfer.

The Member Refers a New Member

While traveling, the member tells people about the reward program that is helping to pay for this vacation. When the member's friends hear about the free hotel stay, many of them are interested in joining the retailer's loyalty program.

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.

Troubleshooting the Display of the Catalog and Products to Loyalty Members

If the catalog and products are not visible in the eLoyalty Member Portal, then correct the settings described in this topic to display them.

Displaying the Catalog

The catalog appears in the member portal only if its type is Buying. Categories appear only if their display template is either Accrual or Redemption.

To display the catalog in the member portal

1. Navigate to the Administration - Product screen, Product Catalog screen.
2. In the Catalogs list, select the catalog.
3. In the Catalogs form, in the Catalog Type field, select Buying.
4. In the Catalogs list, click on the Name hyperlink for the catalog.
5. For each category, in the Category Detail form, in the Display Template field, select either Accrual or Redemption.

Displaying Products

Products appear only if the Organization is the same for the member, the contact, the product, and the price list. If the appropriate products do not appear in the member portal, then make sure the organizations are the same for all these items.

You do not have to make these the primary organizations. As long as it is in the list of organizations, the member has access.

For more information about products, see *Siebel Product Administration Guide* . For more information about price lists, see *Siebel Pricing Administration Guide* .

To display products in the member portal

1. Navigate to the Loyalty Members screen, select a member's record, and note the member's organization and name.

   It is in the Organization field of the More Info view.
2. Make sure the Contact record for that member has the same organization:
   a. Navigate to the Contacts screen, Contacts List view.
   b. In the Contacts list, click the Last Name field hyperlink for the member's contact record.
   c. Click the More Info view tab.
   d. Click the Select button in the Organization field.
   e. If the member's organization is not already listed in the Organizations dialog box, then add it to the list.
   f. Close the dialog box.
3. Make sure the Loyalty Program has the same organization:
   a. Navigate to the Loyalty Program Administration screen.
   b. Click the Program Id field hyperlink for a program.
   c. Click the Select button in the Organization field.
   d. If the member's organization is not already listed in the Organizations dialog box, then add it to the list.
   e. Close the dialog box.
4. Make sure the products have the same organization:
   a. Navigate to the Administration - Product screen.
   b. In the Products list, select a product.
   c. In the More Info form, in the Organization field, click the Select button.
   d. If the member's organization is not already listed in the Organizations dialog box, then add it to the list.
   e. Close the dialog box.
   f. Repeat these steps for all the products that you want to appear in the catalog.
5. Make sure the price list has the same organization:
   a. Navigate to the Administration - Pricing screen.
   b. In the Price Lists list, select a price list.
   c. In the More Info form, in the Organization field, click the Select button.
   d. If the member's organization is not already listed in the Organizations dialog box, then add it to the list.
   e. Close the dialog box.

10 Siebel Loyalty Workflow, Task Flow, and Methods Reference

Siebel Loyalty Workflow, Task Flow, and Methods Reference

This appendix documents workflows, task flows, and methods that are specific to Siebel Loyalty. It includes the following topics:

- *Siebel Loyalty Workflows*
- *Siebel Loyalty Task Flows*
- *LOY Processing Engine Business Service*
- *LOY Interactive Processing Engine Business Service*

Siebel Loyalty Workflows

Workflows for Siebel Loyalty are described in the following topics:

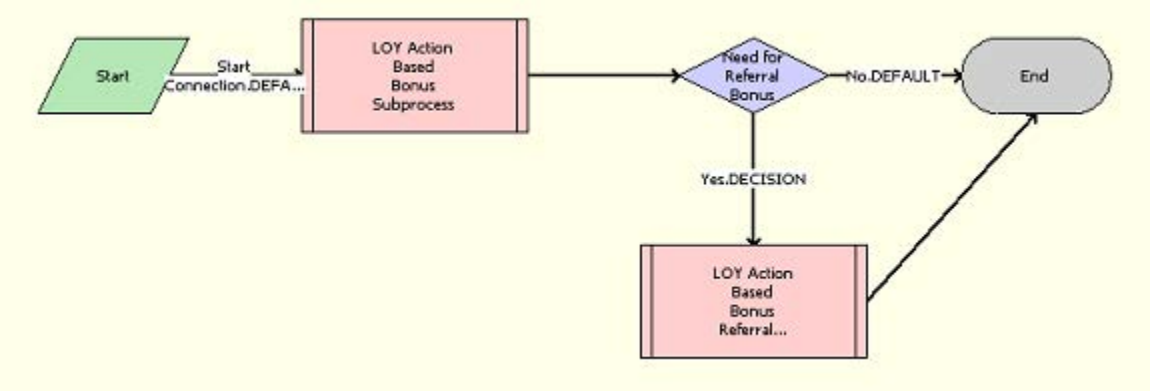
- *LOY ABB New Member Process Workflow*
- *LOY ABB Web Update Process Workflow*
- *LOY ABB Web Update Shell Process Workflow*
- *LOY Action Based Bonus Referral SubProcess Workflow*
- *LOY Action Based Bonus Subprocess Workflow*
- *LOY Activate Promotion Process Workflow*
- *LOY Approval Process Workflow*
- *LOY Bulk Action Process Workflow*
- *LOY Bulk Import Accrual Process Workflow*
- *LOY Bulk Member Admin Process Workflow*
- *LOY Cancel Transaction Process Workflow*
- *LOY Cannot Copy Promotion Process Workflow*
- *LOY Change Member Tier Workflow*
- *LOY Deactivate Promotion Process Workflow*
- *LOY EAI Export Program Workflow*
- *LOY EAI Export Promotions Workflow*
- *LOY EAI Export Transactions Workflow*
- *LOY EAI Import Program Workflow*
- *LOY EAI Import Promotion Workflow*

- *LOY eMember - Checkout Process Workflow*
- *LOY Engine - Process Batch Workflow*
- *LOY Engine - Process Expired Accruals Workflow*
- *LOY Engine - Process Object Workflow*
- *LOY Engine - Process Promotion Bucket Workflow*
- *LOY Engine - Process Tier Workflow*
- *LOY Engine - Process Transaction Workflow*
- *LOY Engine - Simulate Object Workflow*
- *LOY Engine - Start Engine Workflow*
- *LOY Engine - Update Cache Workflow*
- *LOY Engine - Update Program Cache Workflow*
- *LOY Loan Repayment Workflow*
- *LOY Member Enrollment Process Workflow*
- *LOY Modify Promotion Process Workflow*
- *LOY Optin Promotion Process Workflow*
- *LOY Optin Promotion Sub Process Workflow*
- *LOY Point Transfer Process Workflow*
- *LOY PreAlloted Membership Generation Workflow*
- *LOY Return Points to Parent Point Block Workflow*
- *LOY Update Parent Point Block Reserved Points Workflow*
- *LOY Update Program Process Workflow*
- *LOY User Registration Member Process Workflow*

LOY ABB New Member Process Workflow

The LOY ABB New Member Process workflow, shown in the following image, calls the LOY Action Based Bonus Subprocess, querying for Part Number equals Registration Bonus. If needed, then it also calls LOY Action Based Bonus Referral SubProcess to:

- Create whether a new transaction has an action-based bonus of the type Registration Bonus.
- Check whether there is need to create a referral-bonus transaction.

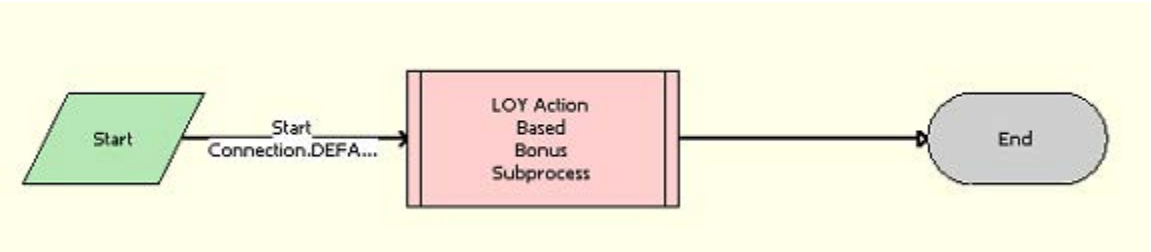


Workflow Description. This workflow performs the following actions:

- **LOY Action Based Bonus Subprocess.** This step calls a subprocess called LOY Action Based Bonus Subprocess which creates a new transaction for an Action Based Bonus of the type Registration Bonus.
- **Need for Referral Bonus.** This step ends the workflow if a referral bonus is not required.
- **LOY Action Based Bonus Referral SubProcess.** If Referral Bonus is required, then this step calls LOY Action Based Bonus Referral SubProcess, which creates a new transaction that gives a bonus to the referring member.

LOY ABB Web Update Process Workflow

The LOY ABB Web Update Process workflow, shown in the following image, calls LOY Action Based Bonus Subprocess, querying for Part Number equals Registration Bonus, to create a new transaction that gives an action-based bonus of the type Web Update Bonus.

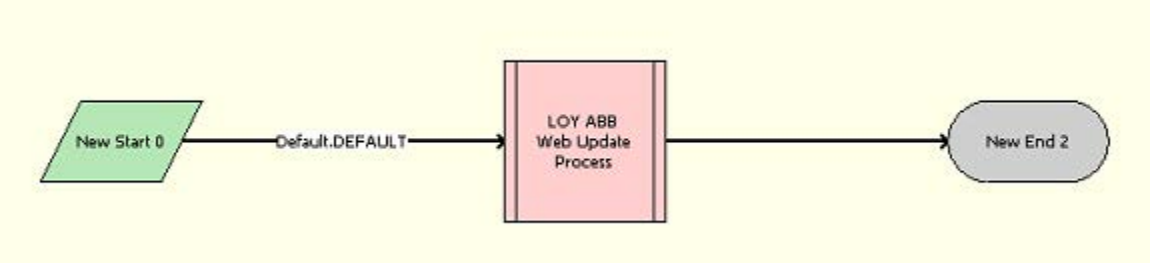


Workflow Description. This workflow performs the following action:

- **LOY Action Based Bonus Subprocess.** This step calls called LOY Action Based Bonus Subprocess, which creates a new transaction to give an action-based bonus of the type Web Update Bonus.

LOY ABB Web Update Shell Process Workflow

The LOY ABB Web Update Shell Process workflow, shown in the following image, calls the workflow LOY ABB Web Update Process when certain member data are updated in the customer application.

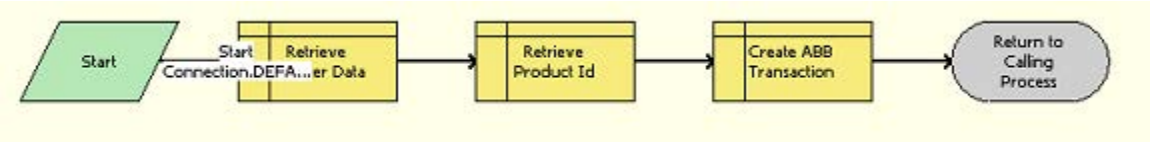


Workflow Description. This workflow performs the following action:

- **LOY ABB Web Update Process.** This step calls the LOY ABB Web Update Process workflow, which creates a new transaction to provide an action-based bonus of type Web Update Bonus.

LOY Action Based Bonus Referral SubProcess Workflow

The LOY Action Based Bonus Referral SubProcess workflow, shown in the following image, creates a new transaction for the referring member with an action-based bonus of the type Referral Bonus.



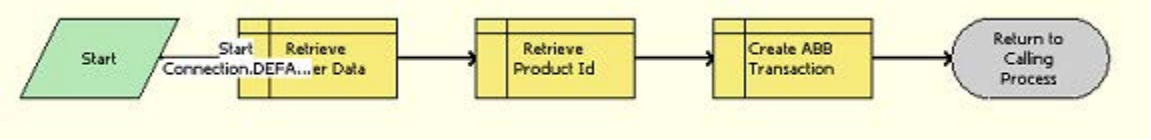
Workflow Description. This workflow performs the following actions:

- **Retrieve Member Data.** This step retrieves member data.
- **Retrieve Product Id.** This step retrieves Product Id.
- **Create ABB Transaction.** This step creates a transaction to provide an action-based bonus of the type Referral Bonus.

LOY Action Based Bonus Subprocess Workflow

The LOY Action Based Bonus Subprocess workflow, shown in the following image, creates two types of action based bonuses.

- When called by LOY ABB New Member Process, it creates a new transaction to provide an action-based bonus of the type Registration Bonus.
- When called by LOY ABB Web Update Process, it creates a new transaction to provide an action-based bonus of the type Web Update Bonus.

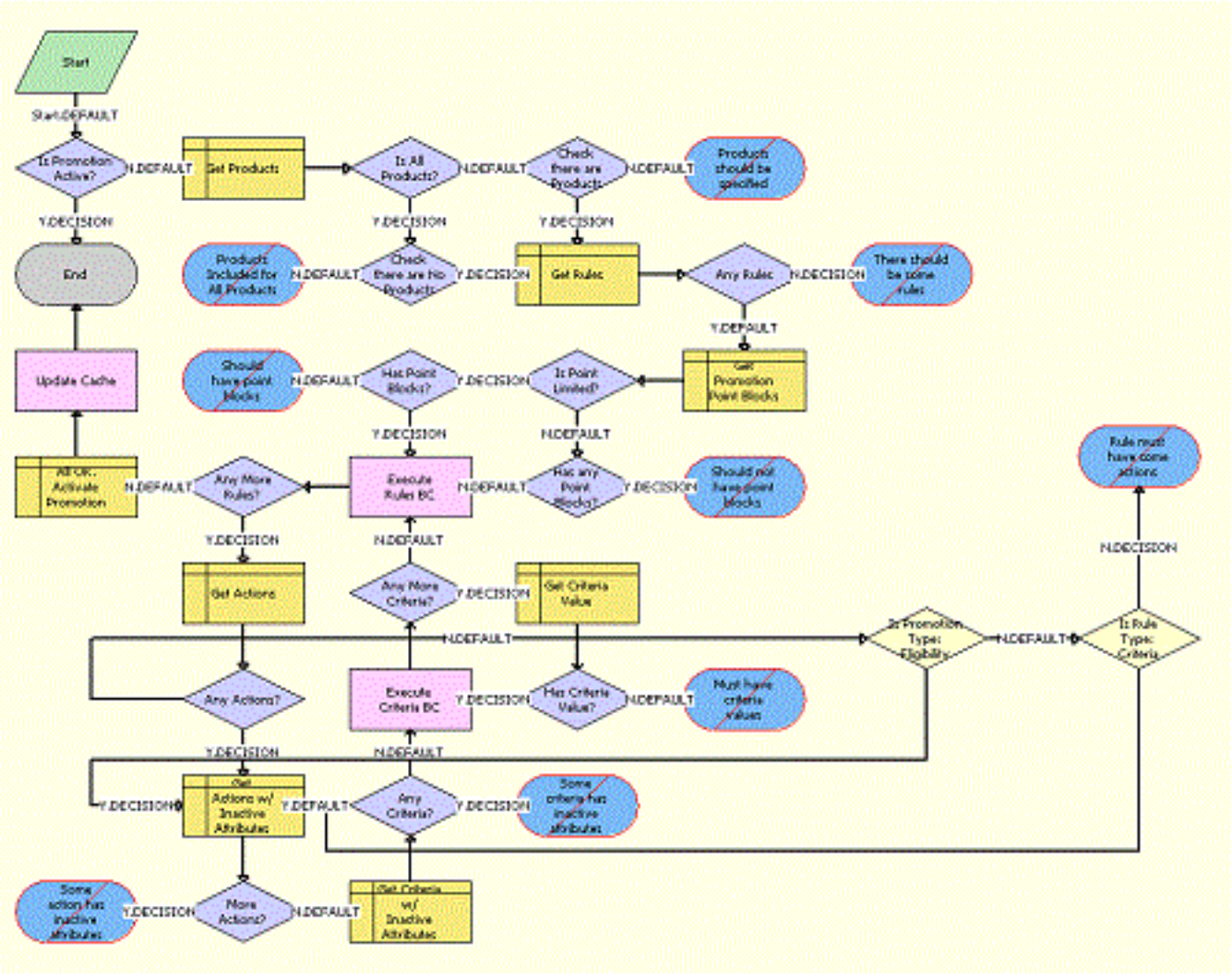


Workflow Description. This workflow performs the following actions:

- **Retrieve Member Data.** This step retrieves member data.
- **Retrieve Product Id.** This step retrieves Product Id.
- **Create ABB Transaction.** This step creates an action-based bonus transaction of the type Registration Bonus when called by LOY ABB New Member Process and of the type Web Update Bonus when called by LOY ABB Web Update Process.

LOY Activate Promotion Process Workflow

The LOY Activate Promotion Process workflow, shown in the following image, is invoked when a promotion is activated. It validates whether the minimum necessary rules, criteria, and actions required by the promotion are defined.



Workflow Description. This workflow performs the following actions:

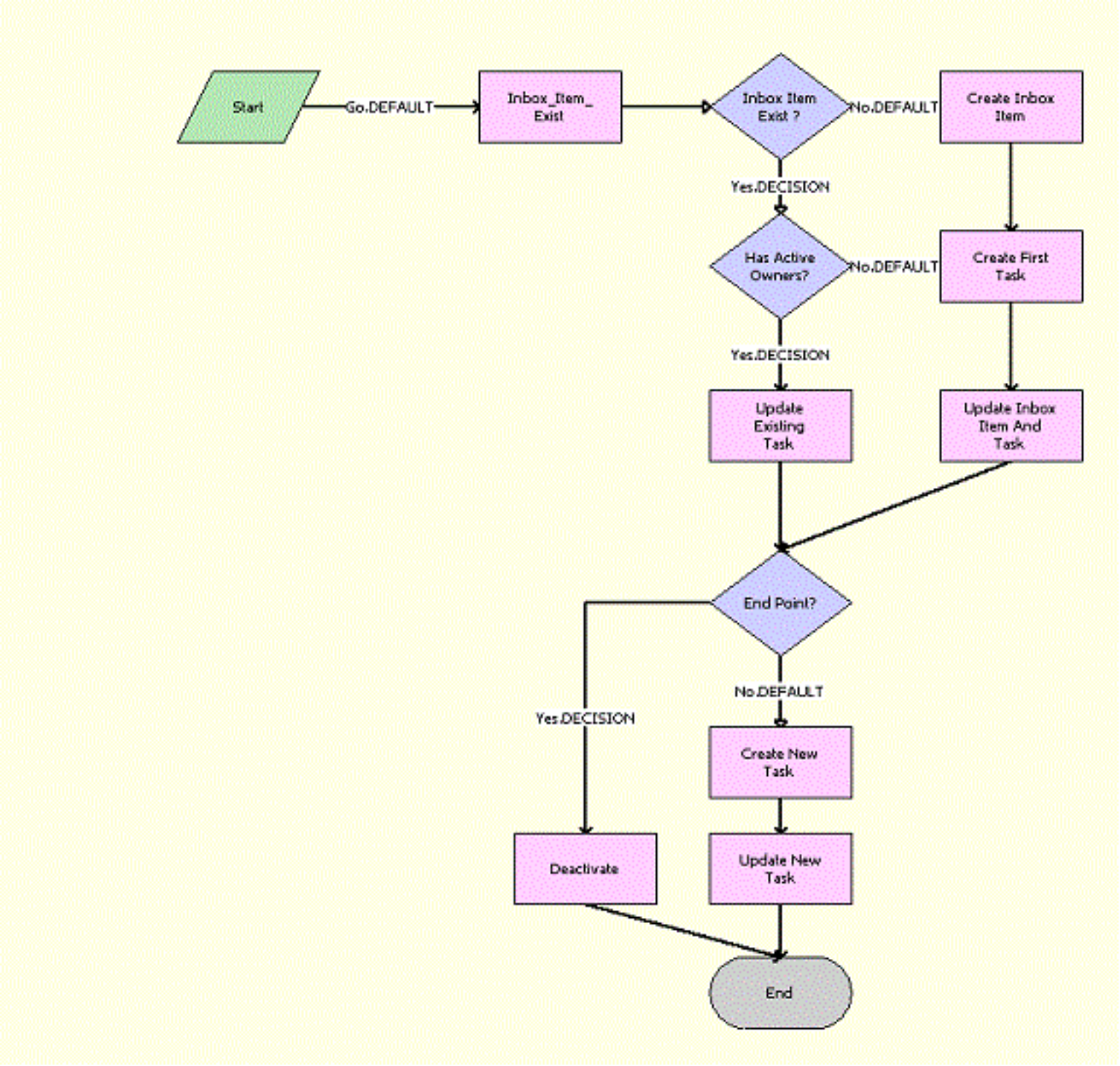
- **Is Promotion Active?** If the promotion is active, then this step ends the workflow. Otherwise, this step calls the next step, Get Products.

- **Get Products.** This step queries for the Products.
- **Is All Products?** This step checks whether the Product Inclusion Rule is All Products.
- **Check there are No Products.** If the product inclusion rule is All Products, then this step checks whether there are any products associated with the promotion. If there are products, then it displays an error message saying that there are products associated with the promotion but the product inclusion rule is All Products. Otherwise, it calls the step Get Rules.
- **Check there are Products.** If the product inclusion rule is not All Products, then this step checks whether there are any products associated with the promotion. If there are no products, then it displays an error message saying there are no products associated with the promotion but the product inclusion rule is either Include or Exclude Products. Otherwise, it calls the step Get Rules.
- **Get Rules.** This step retrieves the rules.
- **Any Rules.** This step checks if there are any rules. If there are no rules, then it displays an error message saying the promotion has no rule defined for it. Otherwise, it calls the next step, Get Promotion Point Blocks.
- **Get Promotion Point Blocks.** This step retrieves the point blocks associated with the promotion.
- **Is Point Limited?** This step checks whether the promotion is a point-limited promotion.
- **Has Point Blocks?** If the promotion is point-limited, then this step checks whether it has any point blocks. If it does not have point blocks, then this step displays an error message saying there are no point blocks assigned to the point limited promotion. Otherwise, it calls the step Execute Rules BC.
- **Has any Point Blocks?** If the promotion is not point-limited, then this step checks whether it has any point blocks. If it has point blocks, then this step displays an error message saying there are point blocks assigned to the unlimited points promotion. Otherwise, it calls the step Execute Rules BC.
- **Execute Rules BC.** This step calls the method BCNextRecord of the SIA BC Utility Service Business Service, which retrieves the next record in the business component.
- **Any More Rules?** If a rule exists, then this step calls Get Actions. Otherwise, it calls the step All OK. Activate Promotion.
- **Get Actions.** This step retrieves the actions of the rule.
- **Any Actions?** If any Action exists, then this step calls the step Get Actions w/ Inactive Attributes. Otherwise, it calls the step Is Promotion Type: Eligibility.
- **Is Promotion Type: Eligibility.** This step checks the promotion type. If it is of type Eligibility, then this step calls the step Get Actions w/ Inactive Attributes. Otherwise, it calls Is Rule Type: Criteria.
- **Is Rule Type: Criteria.** This step checks the rule type. If it is of type Criteria, then this step calls the step Get Actions w/ Inactive Attributes. Otherwise, it displays an error message saying the promotion rule does not have any action defined.
- **Get Actions w/ Inactive Attributes.** This step gets actions that have an attribute id specified, but that have the active flag for the corresponding attribute as N (which means inactive) or NULL (which means deleted).
- **More Actions?** If any actions with inactive attributes exist, then this step displays an error message saying that the action refers to an attribute definition that is either inactive or is no longer available. Otherwise, it calls the next step, Get Criteria w/ Inactive Attributes.
- **Get Criteria w/ Inactive Attributes.** This step gets criteria that have an attribute id specified, but that have the active flag for the corresponding attribute as N (which means inactive) or NULL (which means deleted).
- **Any Criteria?** If any criteria with inactive attributes exist, then this step displays an error message saying that the criteria refer to an attribute definition that is either inactive or is no longer available. Otherwise, it calls the step Execute Criteria BC.
- **Execute Criteria BC.** This step calls the method BCNextRecord of the SIA BC Utility Service Business Service, which retrieves the next record in the business component.

- **Any More Criteria?** If any criteria exist, then this step calls the next step, Get Criteria Value. Otherwise, it calls Execute Rules BC.
- **Get Criteria Value.** This step retrieves the criterion value.
- **Has Criteria Value?** If the criterion does not have any value, then this step displays an error message saying that the criterion has no criteria values specified but is of type Compare to Values. Otherwise, it calls the step Execute Criteria BC.
- **All OK. Activate Promotion.** This step activates the promotion.
- **Update Cache.** This step calls the method Update Cache of the LOY Cache Manager Update Business Service, which updates the cache.

LOY Approval Process Workflow

The LOY Approval Process workflow, shown in the following image, approves point blocks and transactions.



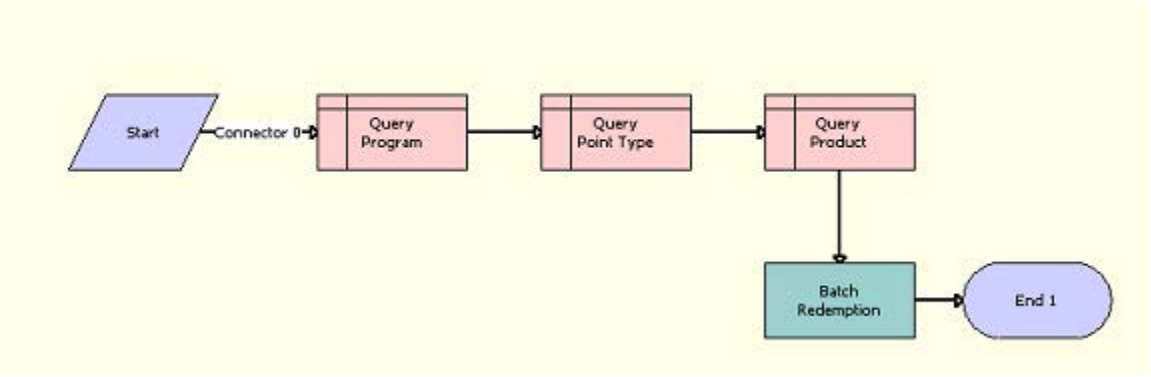
Workflow Description. This workflow performs the following actions:

- **Inbox_Item_Exist.** This step calls the method InboxItemExist of the LOY Approval Process Business Service, which checks whether the inbox item exists and returns the Inbox item Id.
- **Inbox Item Exist?** If inbox item exists, then this step checks whether there are active owners. Otherwise, it calls the step Create Inbox Item.

- **Has Active Owners?** If there are active owners for the inbox item, then this step calls the step Update Existing Task. Otherwise, it calls the step Create First Task.
- **Create Inbox Item.** This step calls the method CreateInboxItem of the LOY Approval Process Business Service, which creates the inbox item.
- **Create First Task.** This step calls the method CreateNewTask of the LOY Approval Process Business Service, which creates the task for the inbox item.
- **Update Inbox Item And Task.** This step calls the method UpdateInboxItemAndTask of the LOY Approval Process Business Service, which updates the owner information for the task.
- **Update Existing Task.** This step calls the method UpdateExistingTask of the LOY Approval Process Business Service, which updates the owner information for the task.
- **End Point?** This step checks if the status is at the last step of the approval process. If so, then it calls the next step, Deactivate. Otherwise, it calls the step Create New Task.
- **Deactivate.** This step calls the method DeactivateTask of the LOY Approval Process Business Service, which deactivates all the active Inbox Tasks for the given Inbox Item.
- **Create New Task.** This step calls the method CreateNewTask of the LOY Approval Process Business Service, which creates a new item task for the object and deactivates all the active tasks.
- **Update New Task.** This step calls the method UpdateNewTask of the LOY Approval Process Business Service, which updates the newly created item task with the values of Inbox Name and Start Working Time.

LOY Batch Redemption Process Workflow

The LOY Batch Redemption Process workflow, shown in the following image, creates a redemption batch transaction for all the members whose point balance is greater than the defined threshold value.

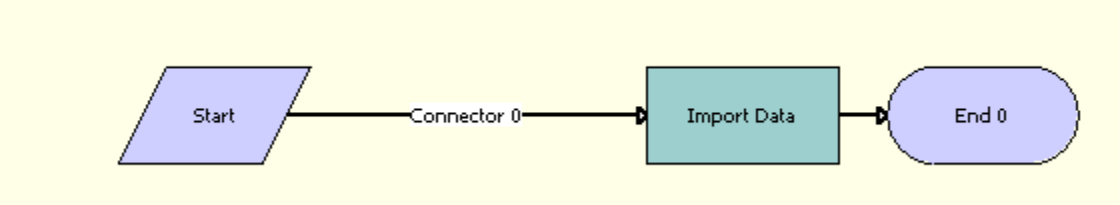


Workflow Description. This workflow performs the following actions:

- **Query Program.** This step queries the Threshold Point, Partner Id and Program Id fields.
- **Query Point Type.** This step queries the Point Internal Name field.
- **Query Product.** This step queries the Product Id field.
- **Batch Redemption.** This step calls the method BatchRedemtion of the LOY Redemption Service (Business Service) which creates a redemption batch transaction.

LOY Bulk Action Process Workflow

The LOY Bulk Action Process workflow, shown in the following image, is used by the Bulk Administration screen, which is launched in asynchronous mode for performing bulk actions.

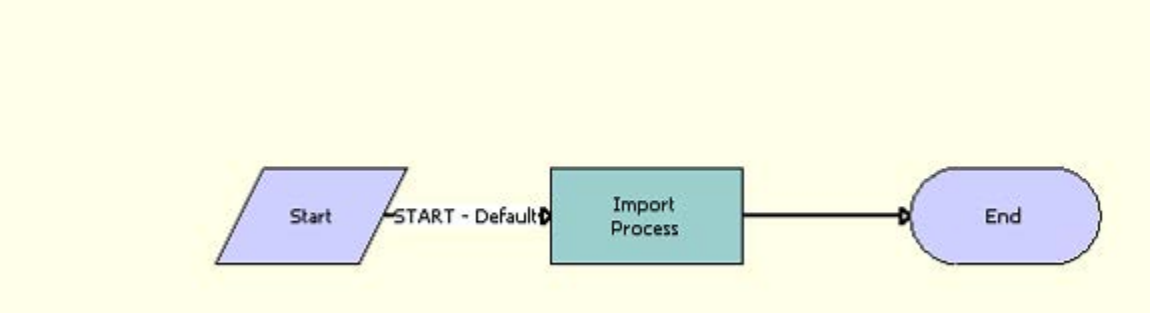


Workflow Description. This workflow performs the following action:

- **Import Data.** This step calls the Process method of the Business Service- LOY Member Admin Service, which processes the actions of the promotions.

LOY Bulk Import Accrual Process Workflow

The LOY Bulk Import Accrual Process workflow, shown in the following image, is used by Bulk Accrual Import process to validate that there are records in the staging table. You can modify this workflow to include custom validations.

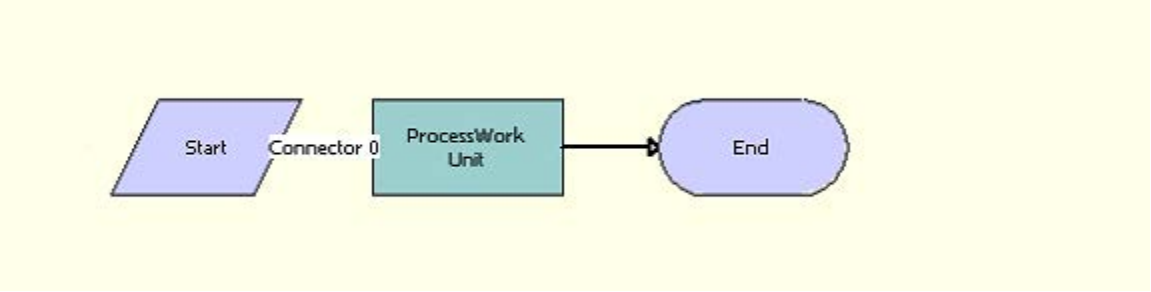


Workflow Description. This workflow performs the following action:

- **Import Process.** This step calls the ImportAccruals method of the LOY Bulk Accrual Service Business Service, which validates that there are records in the staging table.

LOY Bulk Member Admin Process Workflow

The LOY Bulk Member Admin Process workflow, shown in the following image, is called in asynchronous mode for each work unit used in bulk member administration. For more information about work units, see *About Bulk Loyalty Membership Administration*.

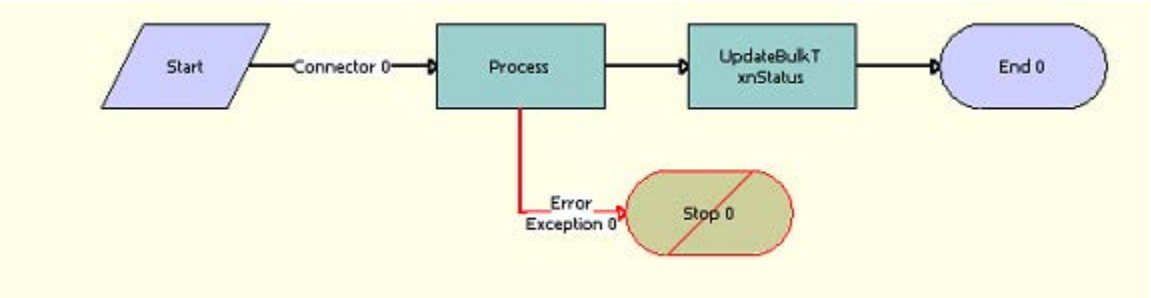


Workflow Description. This workflow performs the following action:

- **ProcessWorkUnit.** This step calls the ProcessWorkUnit method of the LOY Member Admin Service business service, which processes the subset of member administration records that is passed to the workflow by the LOY Member Admin Integration Object.

LOY Bulk Simulation Process Workflow

The LOY Bulk Simulation Process workflow, shown in the following image, simulates processing of multiple transactions received as input from an XML/CSV file.

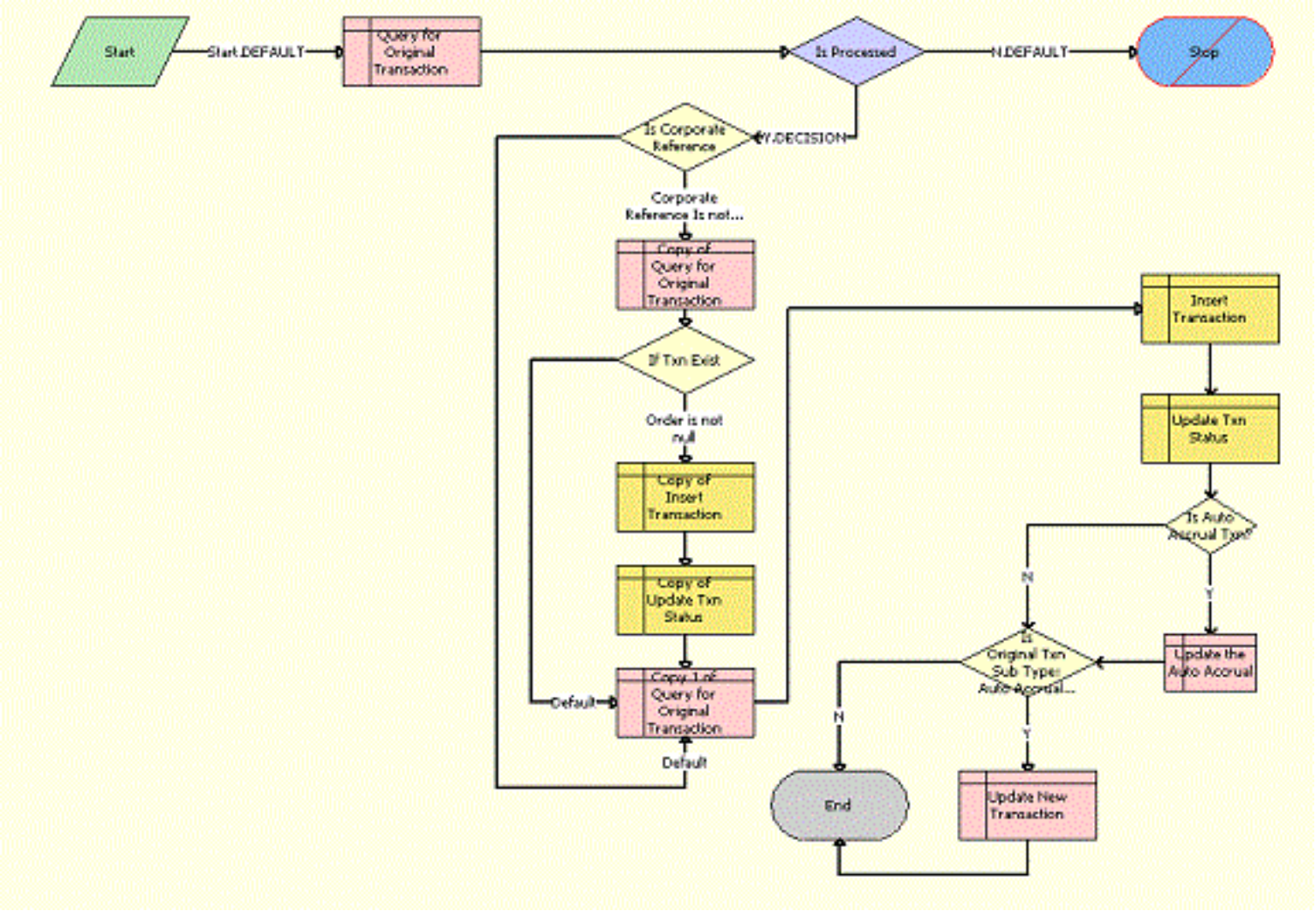


Workflow Description. This workflow performs the following actions:

1. **Process.** This step calls the method GetPropSetFromFile of the LOY Member Services Business Service, which reads the XML/CSV file.
2. **UpdateBulkTxnStatus.** This step calls the method UpdateBulkTxnStatus of the LOY Member Services Business Service, which updates the status to Processed.
3. **Stop 0.** This step generates an error, if the file read process fails.

LOY Cancel Transaction Process Workflow

The LOY Cancel Transaction Process workflow, shown in the following image, cancels a transaction.



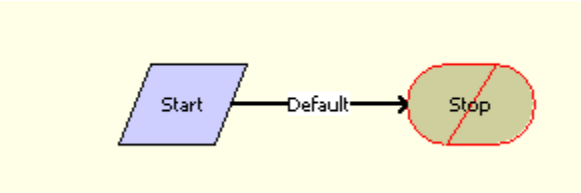
Workflow Description. This workflow performs the following actions:

- **Query for Original Transaction.** This step retrieves data from original transaction.
- **Is Processed.** If the Transaction has been processed, then this step calls the step Is Corporate Reference. Otherwise, it displays an error message saying that the selected transaction cannot be canceled either because its Status is not Processed or because it has updated Tier or Promotion Attributes, that instead this transaction must be cancelled manually.
- **Is Corporate Reference.** This step checks whether the Corporate Reference field is NULL. If it is not NULL, then it calls the step Copy of Query for Original Transaction. Otherwise, it calls the step Copy 1 of Query for Original Transaction. If there is a corporate reference, then two transactions would have been created, one for the corporate account and one for the individual.
- **Copy of Query for Original Transaction.** This step retrieves data from the original transaction.
- **If Txn Exist.** If the Order is not NULL, then this step calls the step Copy of Insert Transaction. Otherwise, it calls Copy 1 of Query for Original Transaction.
- **Copy of Insert Transaction.** This step creates a redemption transaction.
- **Copy of Update Txn Status.** This step updates the status of the corporate transaction to Cancelled.
- **Copy 1 of Query for Original Transaction.** This step retrieves data from the original transaction.

- **Insert Transaction.** This step creates a redemption transaction.
- **Update Txn Status.** This step updates the status of the individual transaction to Cancelled.
- **Is Auto Accrual Txn?** If the transaction is Auto Accrual, then this step calls the step Update the Auto Accrual. Otherwise, it checks the transaction subtype.
- **Update the Auto Accrual.** This step updates the transaction with the transfer member Id.
- **Is Original Txn Sub Type: Auto Accrual?** If the Transaction Sub Type is Auto Accrual, then this step calls the step Update new Transaction. Otherwise, the workflow ends.
- **Update New Transaction.** This step updates the status of the transaction.

LOY Cannot Copy Promotion Process Workflow

The LOY Cannot Copy Promotion Process workflow, shown in the following image, displays an error message when promotion copying is disabled. It is used in conjunction with the LOY Tier Promotion Copy Error Message runtime event action set.

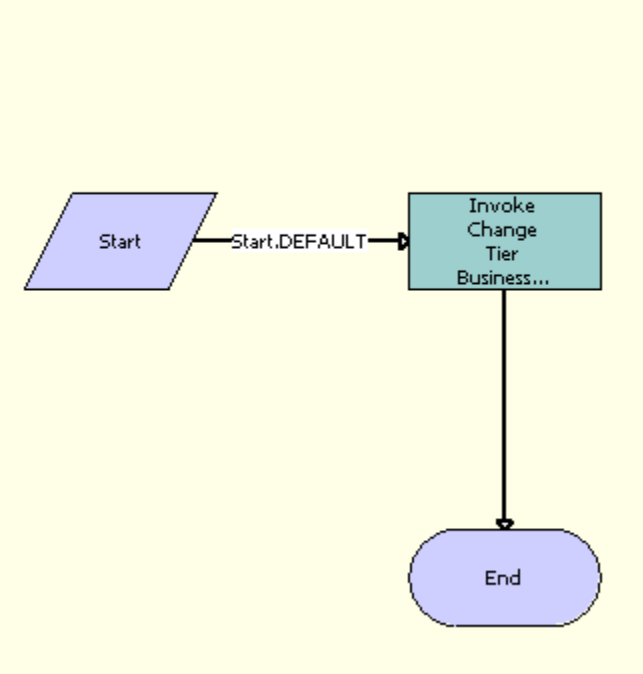


Workflow Description. This workflow performs the following actions:

- **Stop.** This step displays an error message saying that Loyalty Promotions with type Tier cannot be copied when promotion copying is disabled.

LOY Change Member Tier Workflow

The LOY Change Member Tier workflow, shown in the following image, invokes a business service method to change the tier.

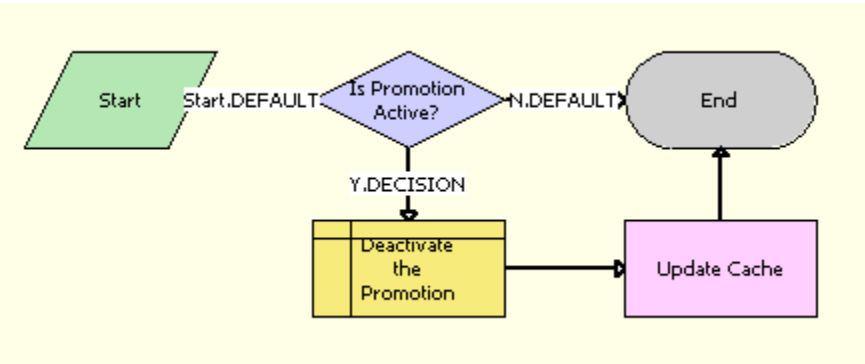


Workflow Description. This workflow performs the following action:

- **Invoke Change Tier Business Service.** This step calls the method ChangeTier of the LOY Change Member Tier Service Business Service, which makes the tier changes.

LOY Deactivate Promotion Process Workflow

The LOY Deactivate Promotion Process workflow, shown in the following image, makes a promotion inactive and removes it from the cache.

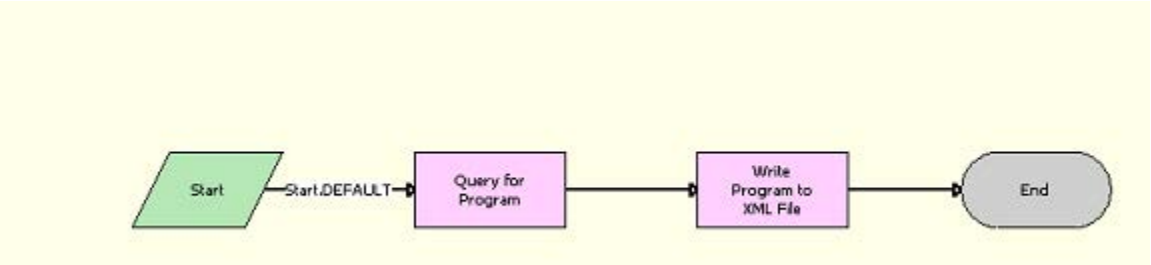


Workflow Description. This workflow performs the following actions:

- **Is Promotion Active.** If the promotion is active, then this step calls Deactivate the Promotion. Otherwise, it ends the workflow.
- **Deactivate The Promotion.** This step makes the promotion inactive.
- **Update Cache.** This step calls the Update Cache method of the LOY Cache Manager Update Business Service, which removes the promotion from the cache.

LOY EAI Export Program Workflow

The LOY EAI Export Program workflow, shown in the following image, enables you to export program data from a third-party application into your Siebel Business Application through the Siebel EAI Adapter. This workflow can also be used to move Loyalty data, such as Loyalty Promotion Rules, from the development to the production environment. It is a sample workflow that you can modify to suit your business requirements.

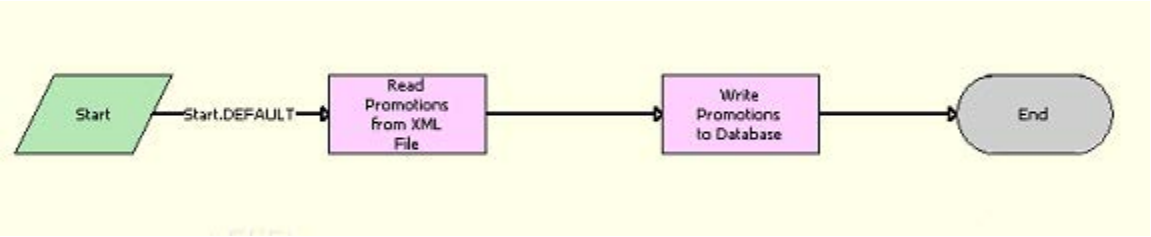


Workflow Description. This workflow performs the following actions:

- **Query for Program.** This step calls the Query method of EAI Siebel Adapter Business Service, which retrieves the program information.
- **Write Program to XML File.** This step calls the WriteEAIMsg method of the EAI XML Write to File Business Service, which writes the information to the XML file.

LOY EAI Export Promotions Workflow

The LOY EAI Export Promotions workflow, shown in the following image, is used by the Promotions screen to export selected promotions to an .xml file, which is used by an external loyalty engine. The location of the exported .xml file is specified as the process property File Name in the workflow.



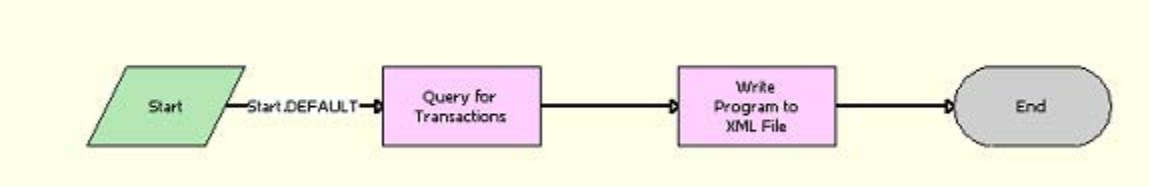
Workflow Description. This workflow performs the following actions:

- **Query for Promotions.** This step calls the Query method of EAI Siebel Adapter Business Service, which returns the selected promotions.
- **Write Promotions to XML File.** This step calls the WriteEAIMsg method of the EAI XML Write to File Business Service, which writes the promotions to the XML file.

LOY EAI Export Transactions Workflow

The LOY EAI Export Transactions workflow, shown in the following image, can be scheduled by the background process which exports promotions to an .xml file if the promotions have the status Partner Pending. The .xml file is used to

send disputed transactions to a partner for validation. The location of the exported .xml file is specified as the process property File Name in the workflow.

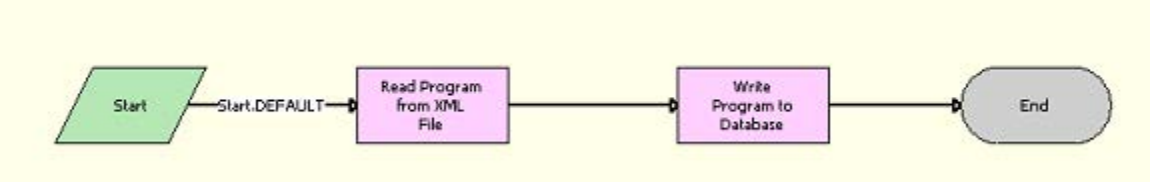


Workflow Description. This workflow performs the following actions:

- **Query for Transactions.** This step calls the Query Page method of EAI Siebel Adapter Business Service, which queries the pending transactions.
- **Write Program to XML File.** This step calls the WriteEAIMsg method of the EAI XML Write to File Business Service, which writes the transactions to the .xml file.

LOY EAI Import Program Workflow

The LOY EAI Import Program workflow, shown in the following image, is used to import program data from a third-party application into your Siebel Business Application through the Siebel EAI Adapter. This workflow can also be used to move Loyalty data, such as Loyalty promotion rules, from the development to the production environment. It is a sample workflow that you can modify to suit your business requirements.

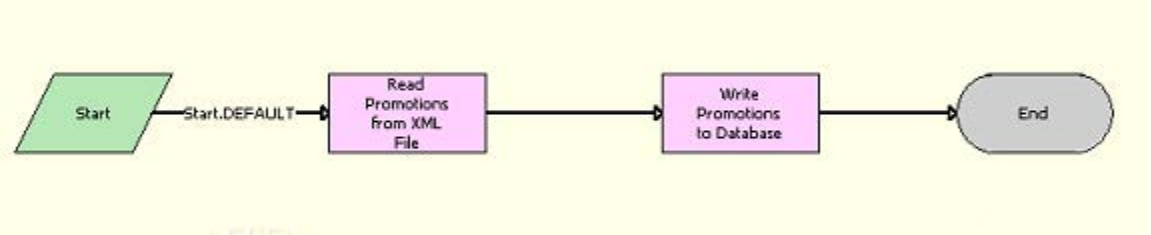


Workflow Description. This workflow performs the following actions:

- **Read Program from XML File.** This step calls the ReadEAIMsg method of EAI XML Read from File Business Service, which interprets the specified .xml file as an EAI message, parses it, and returns the program data in the output property set.
- **Write Program to Database.** This step calls the Synchronize method of the EAI Siebel Adapter Business Service, which synchronizes the program data.

LOY EAI Import Promotion Workflow

The LOY EAI Import Promotion workflow, shown in the following image, allows you to import data for one or more promotions into a Siebel Loyalty program through the Siebel EAI Adapter. You can use this workflow to move Siebel Loyalty promotion data from the development to the production environment. It is a sample workflow that you can modify to suit your business requirements.

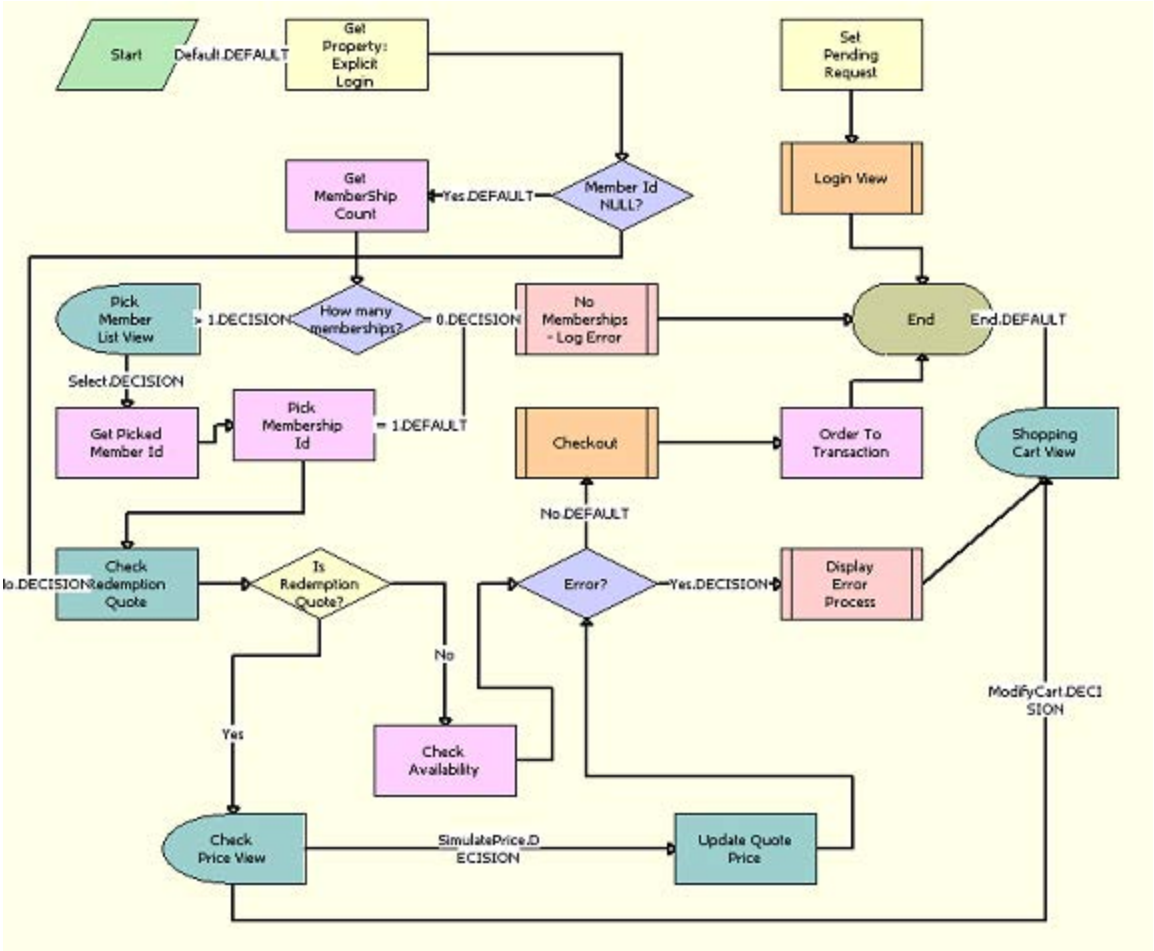


Workflow Description. This workflow performs the following actions:

- **Read Promotions from XML File.** This step calls the ReadEAIMsg method of the EAI XML Read from File Business Service, which interprets the specified .xml file as an EAI message, parses it, and returns the promotion data in the output property set.
- **Write Promotions to Database.** This step calls the Upsert method of the EAI Siebel Adapter Business Service, which either inserts or updates the promotion data.

LOY eMember - Checkout Process Workflow

The LOY eMember - Checkout Process workflow, shown in the following image, checks out order transactions in the shopping cart.

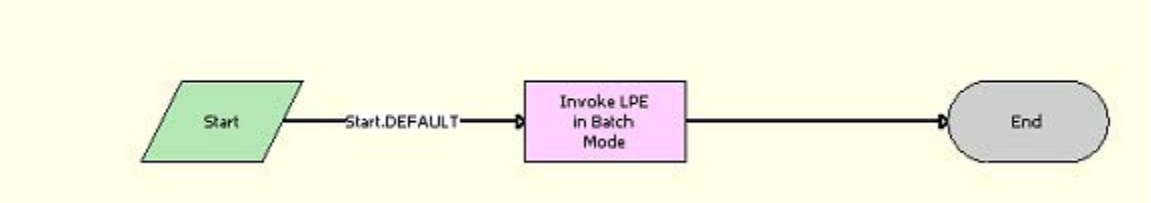


Workflow Description. This workflow performs the following actions:

- **Get Property: Explicit Login.** This step gets the value of the property Explicit Login.
- **Member Id NULL?** If the Member Id is not NULL, then this step calls the step Get MemberShip Count. Otherwise, it calls Check Redemption Quote.
- **Get MemberShip Count.** This step gets the total number of members.
- **How many memberships?** If the number of members is 0, then this step calls the step No Memberships - Log Error. If the number of members is 1, then it calls the step Pick Membership Id. If the number of members is greater than one, then it calls Pick Member List View.
- **No Memberships - Log Error.** This step calls the Subprocess eSales - Display Error Process, which displays the error message.
- **Pick Member List View.** This interactive step displays the LOY Select Membership View (eMember). When the user selects a member, it calls the step Get Picked Member Id.
- **Get Picked Member Id.** This step retrieves the Id of the member selected by the user.
- **Pick Membership Id.** This step calls the method SelectPrimary of the CUT eSales Order Entry Toolkit Service Business Service, which retrieves the Membership Id.
- **Check Redemption Quote.** This step calls the method CheckRedemptionQuote of the LOY Redemption Service Business Service, which checks whether the Quote is of the type Redemption.
- **Is Redemption Quote?** If the Quote is of the type Redemption, then this step calls the step Check Price View. Otherwise, it calls Check Availability.
- **Check Price View.** This interactive step displays the navigate to LOY Current Quote View (eSales) Simulation view. If the user selects SimulatePrice, then it calls the step Update Quote Price. If the user selects ModifyCart, then it calls the step Shopping Cart View.
- **Update Quote Price.** This step calls the method UpdateQuotePrice of the LOY Redemption Service Business Service, which updates the Quote Lines with simulated Price Options.
- **Check Availability.** This step calls the method CheckPointBalance of the LOY Customer Action Business Service, which checks whether the shopping cart contains only Redemption Products.
- **Error?** If any error has been reported during Check Availability or Update Quote Price, then this step calls the step Display Error Process. Otherwise, it calls Checkout.
- **Display Error Process.** This step calls the Subprocess eSales - Display Error Process, which displays an error message.
- **Shopping Cart View.** This interactive step displays the Current Quote View (eSales).
- **Checkout.** This step calls the Subprocess eSales - Checkout Process which starts the actual checkout process.
- **Order To Transaction.** This step calls the method OrderToTxn of the LOY Customer Action Business Service Business Service, which creates a transaction record for every line item in that order.
- **Set Pending Request.** This step calls the method SetPendingRequest of the Shopping Service Business Service, which sets the Profile attribute Pending Request, which is used to continue an operation after login.
- **Login View.** This step calls the subprocess named eSales - Login View, which uses an interactive workflow step to navigate to the Login view.

LOY Engine - Process Batch Workflow

The LOY Engine - Process Batch workflow, shown in the following image, invokes the Loyalty Engine in batch mode for processing.

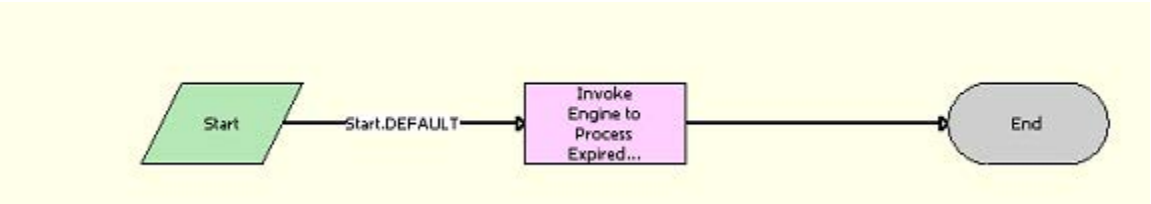


Workflow Description. This workflow performs the following action:

- **Invoke LPE in Batch Mode.** This step calls the method ProcessBatch of the LOY Processing Engine Business Service, which invokes the Loyalty Engine in batch mode.

LOY Engine - Process Expired Accruals Workflow

The LOY Engine - Process Expired Accruals Workflow workflow, shown in the following image, processes an expired accrual on the real-time component.

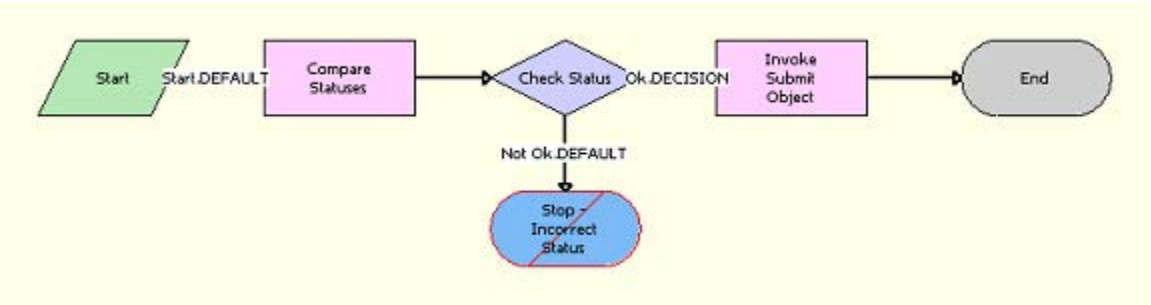


Workflow Description. This workflow performs the following action:

- **Invoke Engine to Process Expired Accruals.** This step calls the method ProcessObject of the LOY Processing Engine Business Service, which processes the expired accrual.

LOY Engine - Process Object Workflow

The LOY Engine - Process Object workflow, shown in the following image, submits a component request to the real-time processing engine component to process the object.



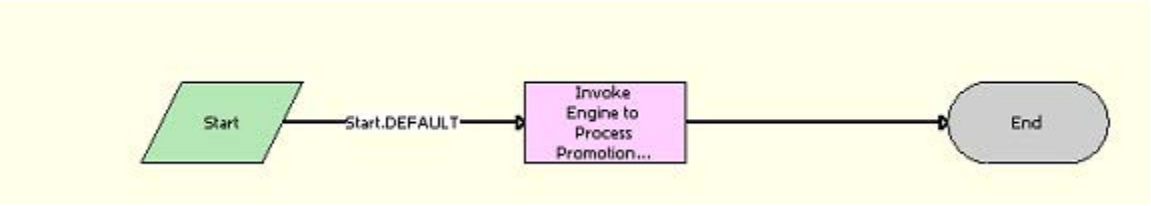
Workflow Description. This workflow performs the following actions:

- **Compare Statuses.** This step calls the Echo method of the Workflow Utilities Business Service, which compares the Required Status with the Object Status
- **Check Status.** If the previous step returns true, then this step calls the Invoke Submit Object step. Otherwise, it stops.

- **Invoke Submit Object.** This step calls the SubmitObjectForProcessing method of the LOY Processing Engine Business Service, which submits the object to the real time processing engine.
- **Stop.Incorrect Status.** This step displays an error message saying that the selected record cannot be submitted for processing.

LOY Engine - Process Promotion Bucket Workflow

The LOY Engine - Process Promotion Bucket workflow, shown in the following image, processes a bucket on the real-time component.

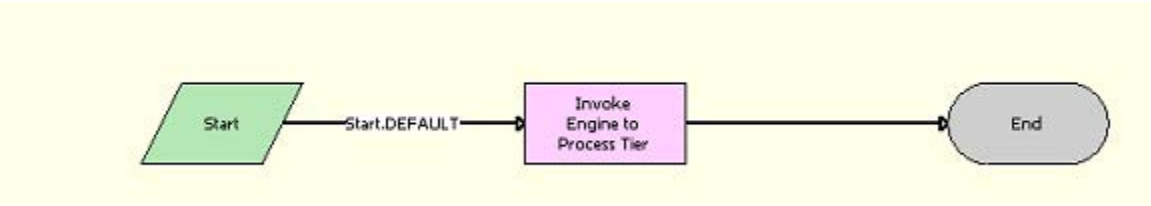


Workflow Description. This workflow performs the following action:

- **Invoke Engine to Process Promotion Bucket.** This step calls the method ProcessObject of the LOY Processing Engine Business Service, which processes the bucket on the real-time component.

LOY Engine - Process Tier Workflow

The LOY Engine - Process Tier workflow, shown in the following image, processes a tier on the real-time component.

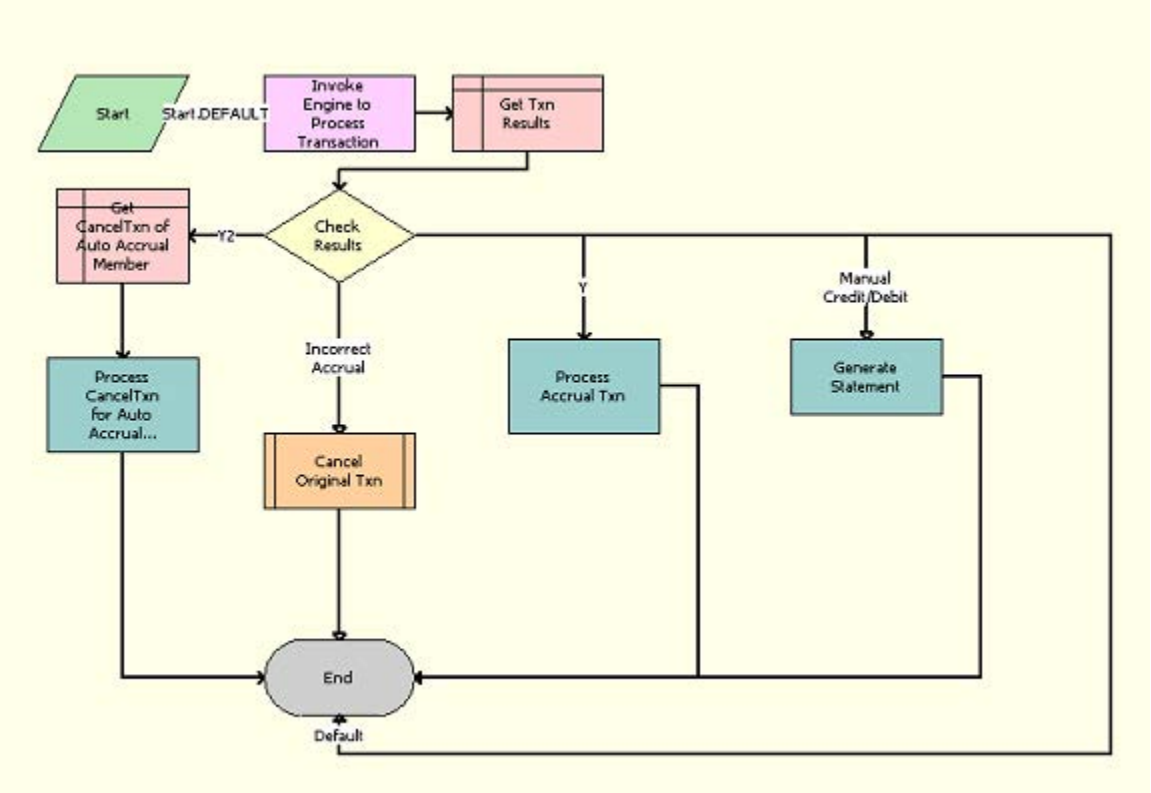


Workflow Description. This workflow performs the following actions:

- **Invoke Engine to Process Tier.** This step calls the method ProcessObject of the LOY Processing Engine Business Service, which processes the tier on the real-time component.

LOY Engine - Process Transaction Workflow

The LOY Engine - Process Transaction workflow, shown in the following image, processes a transaction on the real-time component.

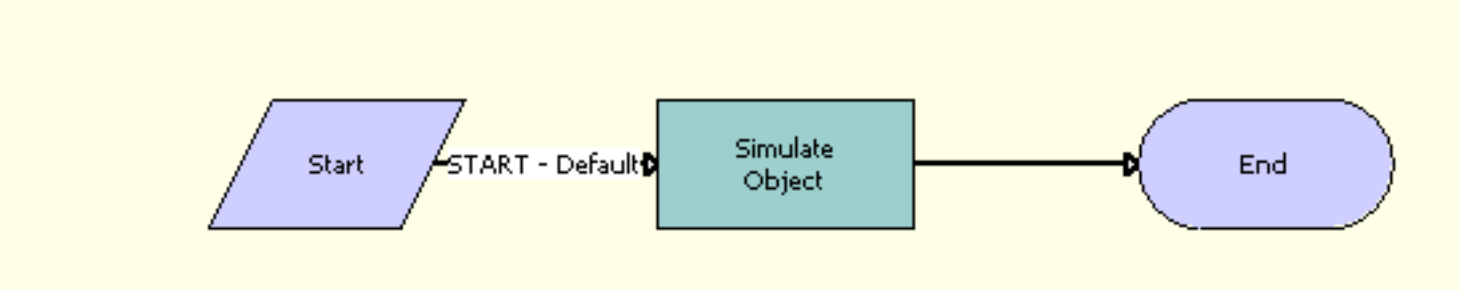


Workflow Description. This workflow performs the following actions:

- **Invoke Engine to Process Transaction.** This step calls the method ProcessObject of the LOY Processing Engine Business Service, which invokes the Loyalty Engine in real-time mode to process the transaction.
- **Get Txn Results.** This step retrieves transaction results, such as transfer transaction Id, transaction status, transaction type, and so on.
- **Check Results.** This step checks the results of the transaction and takes appropriate step.
- **Get CancelTxn of Auto Accrual Member.** If the transaction type is Redemption, the transaction subtype is Cancellation, and the transaction status is Processed, then this step retrieves the transaction Id of the cancelled transaction.
- **Process CancelTxn for Auto Accrual Member.** This step processes the transaction.
- **Cancel Original Txn.** If the transaction subtype is Incorrect Accrual and the status is Processed, then this step calls the subprocess LOY Cancel Transaction Process, which cancels the Transaction.
- **Process Accrual Txn.** If transfer transaction Id is not NULL and transaction status is Processed and transaction subtype is Auto Accrual or Transfer, then this step calls the method ProcessObject of the LOY Processing Engine business service, which processes the transaction.
- **GenerateStatement.** If the transaction subtype is Manual Credit or Manual debit, then this step calls the method GenerateStatement of the LOY Statement business service, which generates the statement.

LOY Engine - Simulate Object Workflow

The LOY Engine - Simulate Object workflow, shown in the following image, simulates the Promotions by evaluating its actions. It uses transactional data from an XML file and does not perform any DML operations.

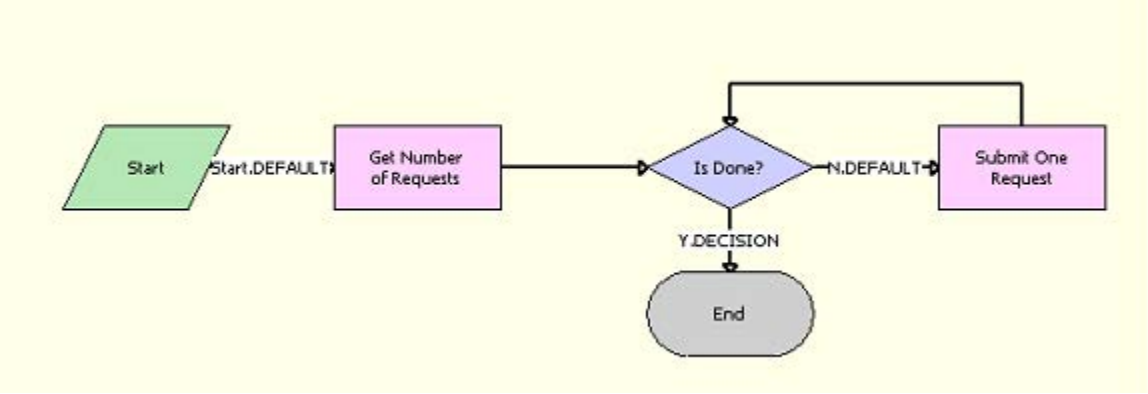


Workflow Description. This workflow performs the following action:

- **Simulate Object.** This step calls the method SimulateObject of the LOY Processing Engine Business Service, which simulates the actions of the promotions.

LOY Engine - Start Engine Workflow

The LOY Engine - Start Engine workflow, shown in the following image, submits the required number of component requests to start the engine. The user must specify the number of processes and the number of processing threads for each process.

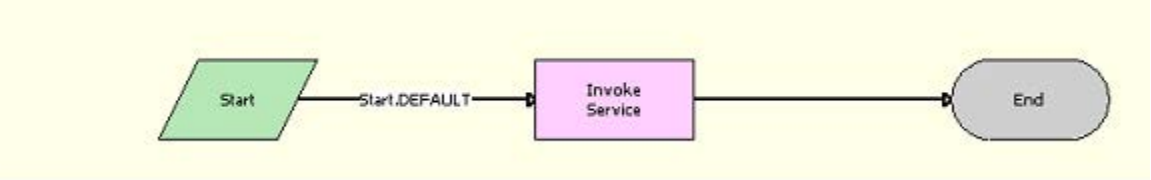


Workflow Description. This workflow performs the following actions:

- **Get Number of Requests.** This step calls the Echo method of the Workflow Utilities Business Service, which calculates the number of requests.
- **Is Done?** If all the requests have been submitted, then this step ends the workflow.
- **Submit One Request.** This step calls the method SubmitRequest of the Server Requests Business Service, which submits the request.

LOY Engine - Update Cache Workflow

The LOY Engine - Update Cache workflow, shown in the following image, updates the cache used by the Loyalty Engine without restarting the engine.

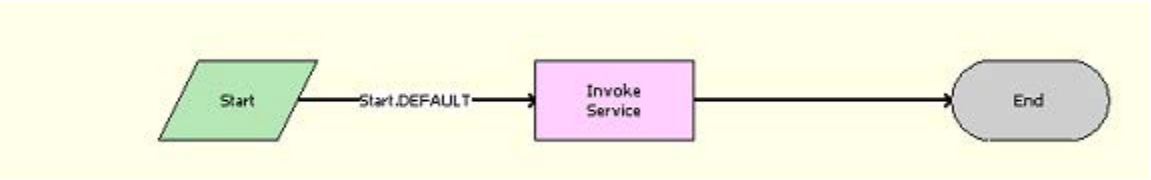


Workflow Description. This workflow performs the following action:

- **Invoke Service.** This step calls the method UpdateCache of the Business Service LOY Processing Engine, which updates the cache.

LOY Engine - Update Program Cache Workflow

The LOY Engine - Update Program Cache workflow, shown in the following image, updates the cache used by the Loyalty Engine without restarting the Loyalty engine.

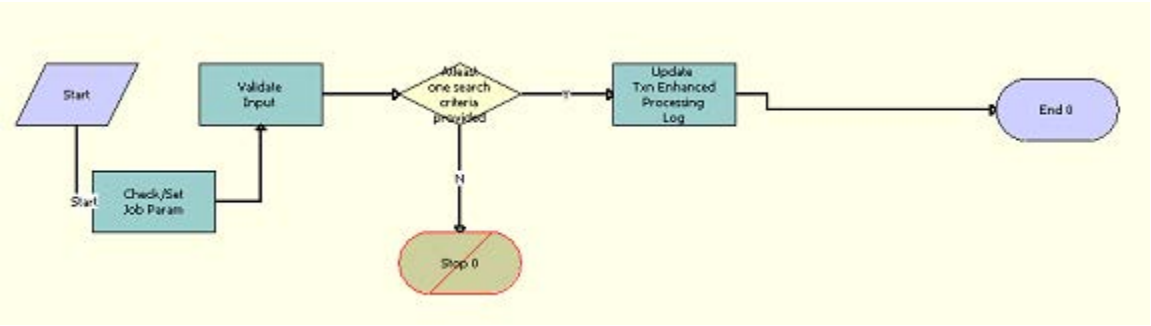


Workflow Description. This workflow performs the following action:

- **Invoke Service.** This step calls the method UpdateCache of the LOY Processing Engine Business Service, which updates the cache for the program.

LOY Get Txn Enhanced Log New Workflow

The LOY Get Txn Enhanced Log New workflow, shown in the following image, populates the enhanced transaction processing log.

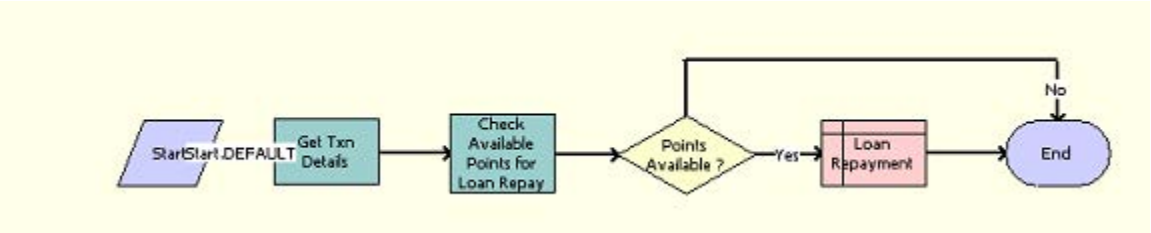


Workflow Description. This workflow performs the following actions:

- **Check/Set Job Param.** This step calls the method CheckParameters of the LOY Member Admin Service Business Service, which queries the parameters table.
- **Validate Input.** This step calls the method ValidateGetTxnLogInputs of the LOY Member Admin Service Business Service, which validates the log inputs for at least one search criterion.
- **Atleast one search criteria provided.** If no search criterion is provided, then this step generates an error. The name of the step in this description literally reproduces the name of the step in the user interface.
- **Update Txn Enhanced Processing Log.** This step calls the method UpdateTxnEnhancedLog of the LOY Member Admin Service Business Service, which populates the Transaction Enhanced Log tables.

LOY Loan Repayment Workflow

The LOY Loan Repayment workflow, shown in the following image, creates a loan repayment transaction for members, if they have sufficient point balance to repay the loan.

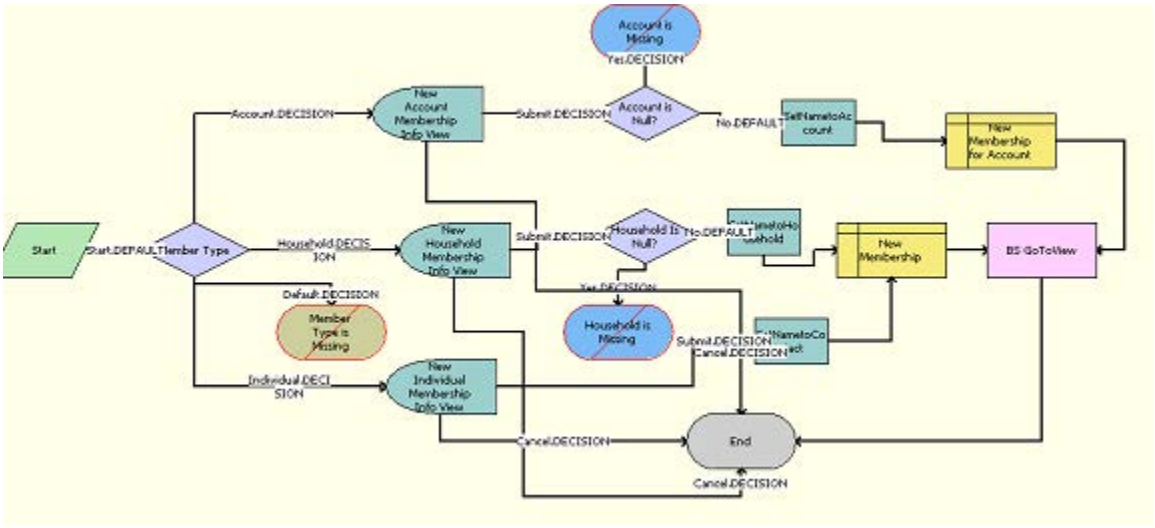


Workflow Description. This workflow performs the following actions:

- **Get Txn Details.** This step calls the method Echo of the Workflow Utilities Business Service, which retrieves the transaction details.
- **Check Available Points for Loan Repay.** This step calls the method AvailPtsForLoanRepay of the LOY Customer Action Business Service, which calculates the points available for Loan repayment.
- **Points Available?** If no points are available, then this step ends the workflow.
- **Loan Repayment.** If points are available, then this step creates a loan repayment transaction.

LOY Member Enrollment Process Workflow

The LOY Member Enrollment Process workflow, shown in the following image, processes new member enrollments.

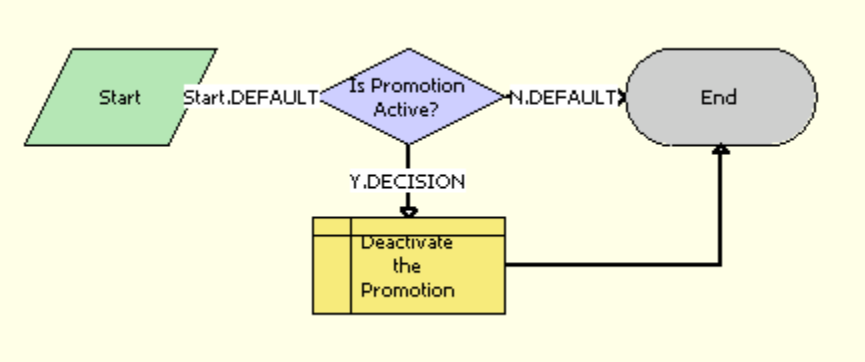


Workflow Description. This workflow performs the following actions:

- **Member Type.** This step checks the Member Type and redirects members to the appropriate views. If the Member Type is not given, then it displays an error message saying the member type is missing.
- **New Account Membership Info View.** This interactive step displays the LOY Enroll Program Account Member Detail View (eApps). If the user clicks Cancel, then the workflow ends. If the User clicks Submit, then this step calls the step Account is Null?
- **Account is Null?** This step checks whether the Account Is Null. If it is Null, then it displays an error message saying the account is missing. Otherwise, it calls the step SetNametoAccount.
- **SetNametoAccount.** This step calls the method Echo of the Workflow Utilities Business Service, which sets the name for the member.
- **New Membership for Account.** This step adds the new member to the account.
- **New Household Membership Info View.** This interactive step displays the LOY Enroll Program Household Member Detail View (eApps). If the user clicks Cancel, then the workflow ends. If the user clicks Submit, then it calls the step Household is Null?
- **Household Is Null?** This step checks whether the Account Is Null. If it is Null, then it displays an error message saying that household is missing. Otherwise, it calls the step SetNametoHousehold.
- **SetNametoHousehold.** This step calls the method Echo of the Workflow Utilities Business Service, which sets the name for the member.
- **New Individual Membership Info View**. This interactive step displays the LOY Enroll Program Member Detail View (eApps). If the user clicks Cancel, then the workflow ends. If the user clicks Submit, then it calls the step SetNametoContact.
- **SetNametoContact.** This step calls the method Echo of the Workflow Utilities Business Service, which sets the name for the member.
- **New Membership.** This step adds the member to the Household or Contacts list.
- **BS GoToView.** This step calls the method GotoView of the CUT eSales Order Entry Toolkit Service Business Service, which navigates to the view LOY Member List View (eApps).

LOY Modify Promotion Process Workflow

The LOY Modify Promotion Process workflow, shown in the following image, makes the promotion inactive and available for editing.

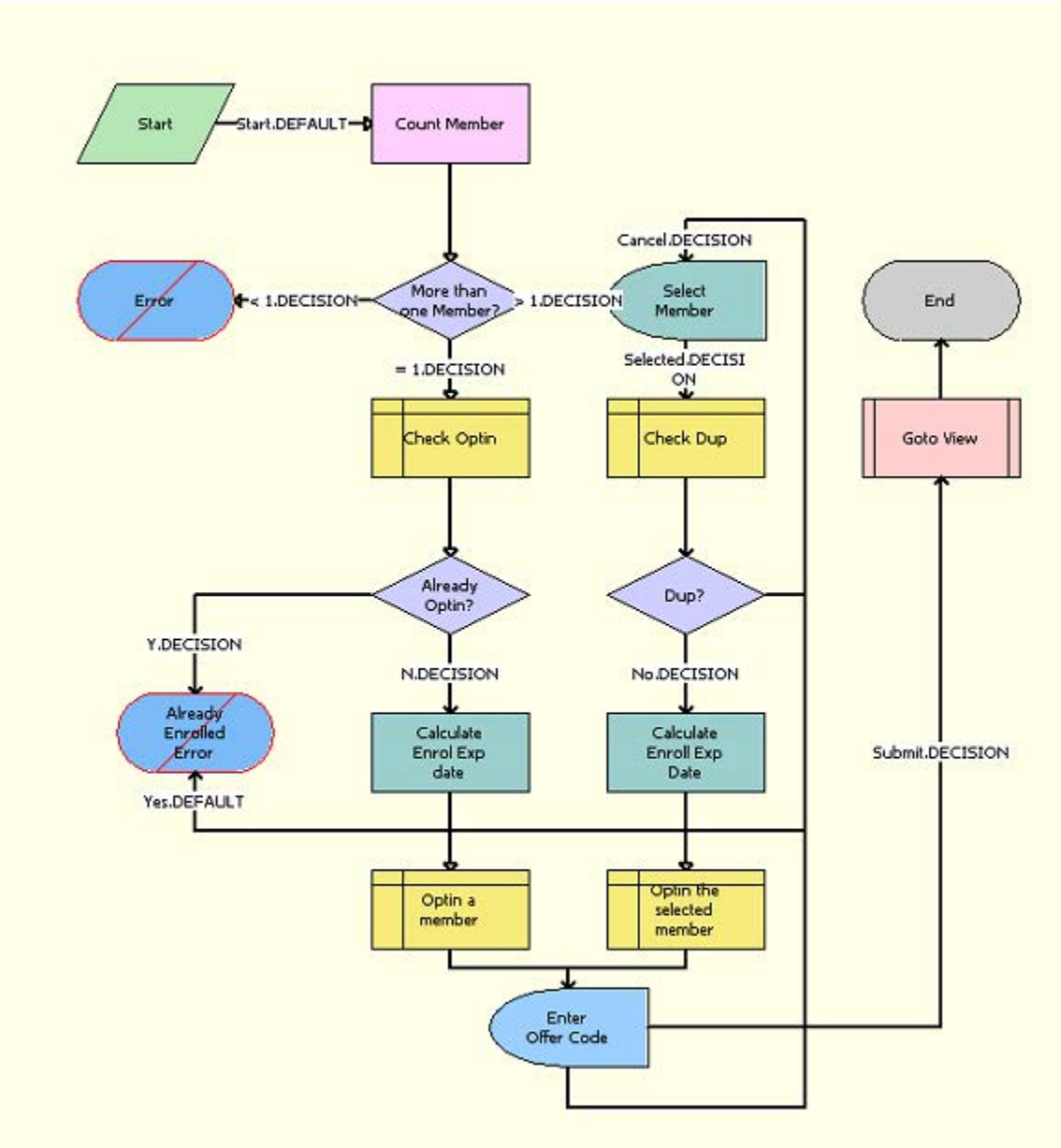


Workflow Description. This workflow performs the following actions:

- **Is Promotion Active?** If the promotion is inactive, then the workflow ends. Otherwise, this step calls the step Deactivate the Promotion.
- **Deactivate the Promotion.** This step makes the promotion inactive and available for editing.

LOY Optin Promotion Process Workflow

The LOY Optin Promotion Process workflow, shown in the following image, is used by the eLoyalty customer application. It enables users to enroll in a promotion.



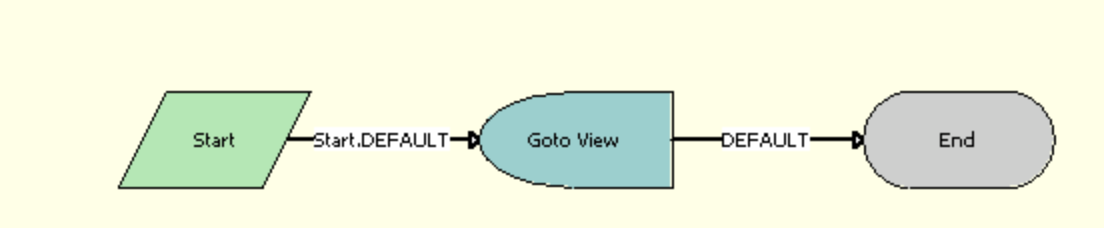
Workflow Description. This workflow performs the following actions:

- **Count Member.** This step calls the method GetBCCount of the CUT eSales Order Entry Toolkit Service Business Service, which returns the number of members in the Contact BC.
- **More than one Member?** If the number of members is less than one, then this step displays an error message saying that none of the user's memberships qualify for this promotion, so the user should select another promotion. If the number of members is equal to 1, then it calls the step Check Optin. If the number of members is greater than 1, then it calls the step Select Member.
- **Check Optin.** If the number of members is equal to 1, then this step queries if the member has already opted In.

- **Already Optin?** If the member has already opted in, then this step displays an error message saying the member is already enrolled into this promotion. Otherwise, it calls the step Calculate Enrol Exp date.
- **Calculate Enrol Exp date.** This step calls the method CalculateEnrollmentExpiryDate of the LOY Member Services Business Service, which calculates the Expiry Date for the enrollment.
- **Optin a member.** This step enrolls the member into the promotion.
- **Select Member.** This interactive step displays the LOY Optin Promotion View (eApps). After the user selects a member, it calls the step Check Dup.
- **Check Dup.** This step checks whether the member has already opted in.
- **Dup?** If it is a duplicate, then this step displays an error message saying the member is already enrolled in this promotion. Otherwise, it calls the step Calculate Enroll Exp Date.
- **Calculate Enroll Exp Date.** This step calls the method CalculateEnrollmentExpiryDate of the LOY Member Services Business Service, which calculates the Expiry Date for the enrollment.
- **Optin the selected member.** This step enrolls the member in the promotion.
- **Enter Offer Code.** This interactive step displays the LOY Offer Code View (eApps). If the user clicks Cancel, then it calls the interactive step Select Member. If the user clicks Submit, then it calls the step Goto View.
- **Goto View.** This step calls the subprocess LOY Optin Promotion Sub Process, which displays LOY Member Promotions View (eApps).

LOY Optin Promotion Sub Process Workflow

The LOY Optin Promotion Sub Process workflow, shown in the following image, is used by the eLoyalty customer application. It enables users to enroll in a promotion.

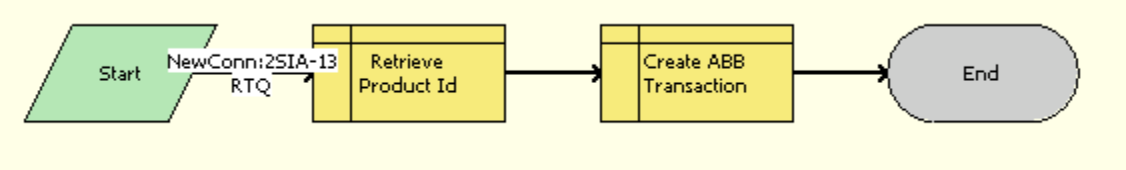


Workflow Description. This workflow performs the following action:

- **Goto View.** This interactive step displays LOY Member Promotions View (eApps).

LOY Point Transfer Process Workflow

The LOY Point Transfer Process workflow, shown in the following image, transfers points between members.

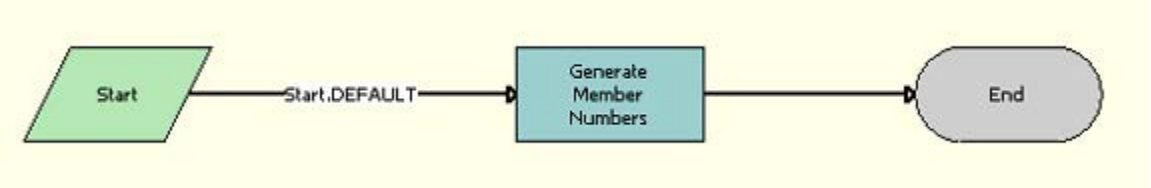


Workflow Description. This workflow performs the following actions:

- **Retrieve Product Id.** This step retrieves the Product Id.
- **Create ABB Transaction.** This step creates an action-based bonus transaction to transfer the points.

LOY PreAlloted Membership Generation Workflow

The LOY PreAlloted Membership Generation workflow, shown in the following image, assigns a membership status to applicants automatically enrolled in programs based on predefined membership identifiers.

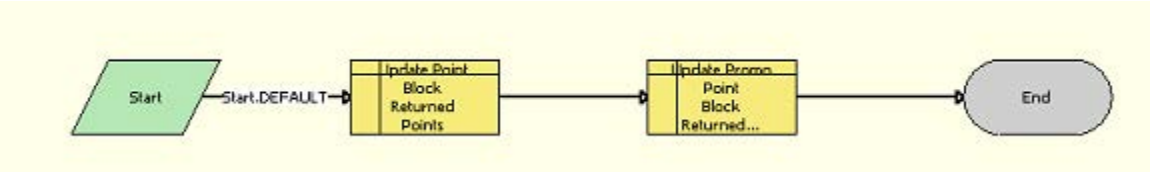


Workflow Description. This workflow performs the following action:

- **Generate Member Numbers.** This step calls the method GeneratePreAllotedMembership of the LOY Batch Enrollment Service Business Service, which generates the member numbers.

LOY Return Points to Parent Point Block Workflow

The LOY Return Points to Parent Point Block workflow, shown in the following image, returns the remaining points in a point block associated with a promotion to the parent point block from which the points were originally reserved, when the status of that point block is set to Consumed. To process any monetary refunds due from the return, Siebel Loyalty tracks the returned value at the parent point block level.

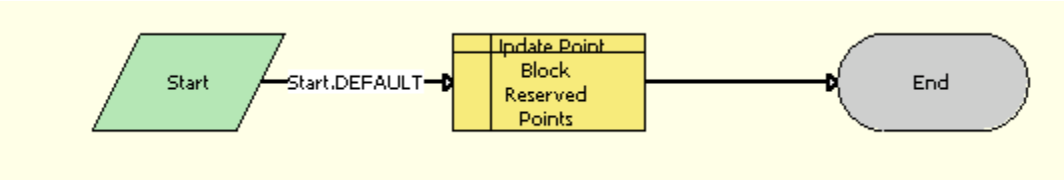


Workflow Description. This workflow performs the following actions:

- **Update Point Block Returned Points.** This step updates the parent point block.
- **Update Promo Point Block Returned Points.** This step updates the point block associated with the promotion.

LOY Update Parent Point Block Reserved Points Workflow

The LOY Update Parent Point Block Reserved Points workflow, shown in the following image, exclusively reserves the points allocated for the promotion in the parent point block, when the Status of a point block associated with a promotion is set to Approved. This prevents unlimited points promotions from consuming preallocated points from the parent point block.

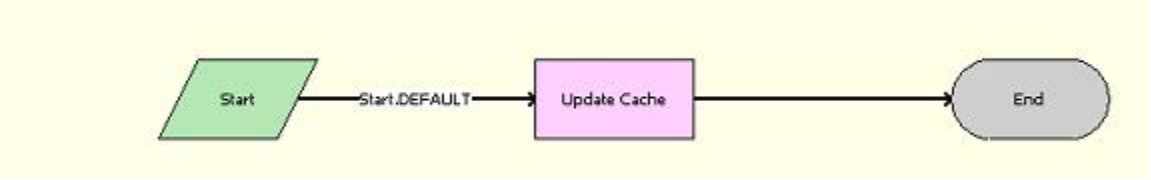


Workflow Description. This workflow performs the following action:

- **Update Point Block Reserved Points.** This step reserves points in the parent point block.

LOY Update Program Process Workflow

The LOY Update Program Process workflow, shown in the following image, is used by the Loyalty Engine to refresh the program cache.

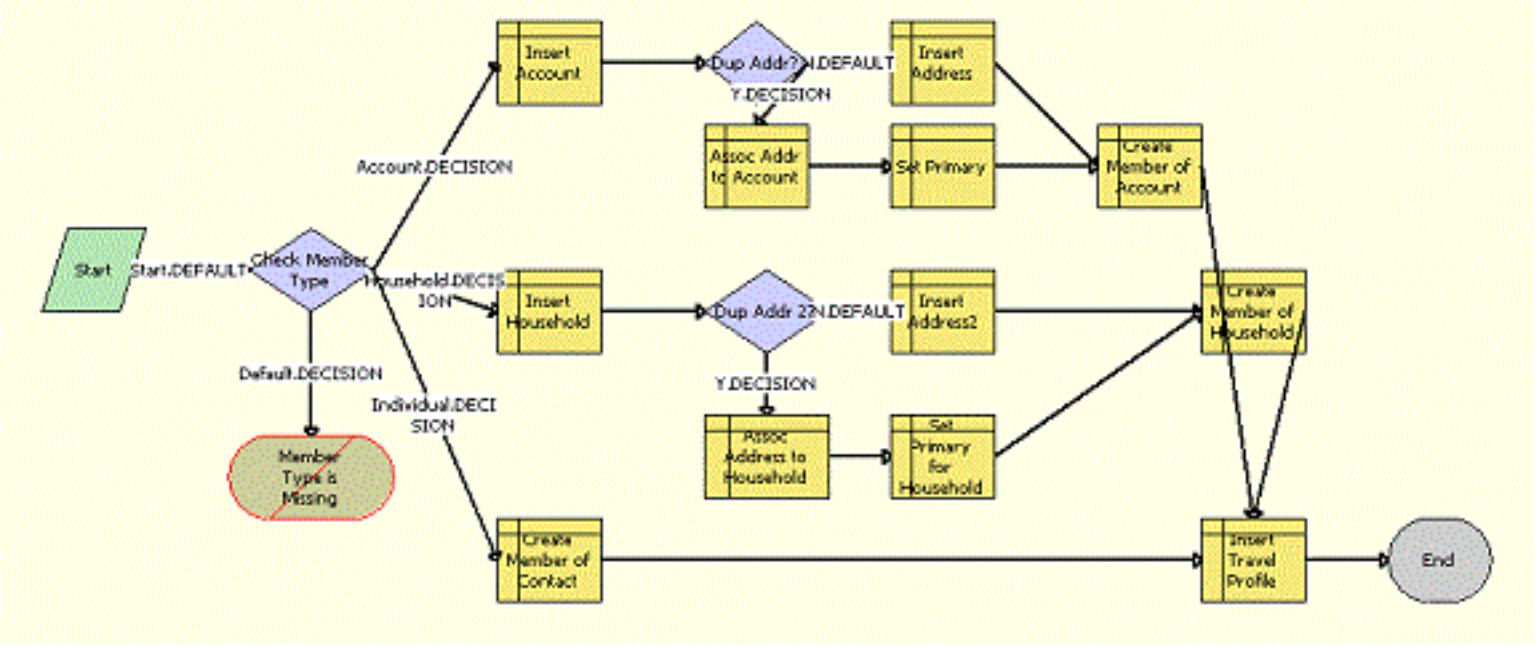


Workflow Description. This workflow performs the following action:

- **Update Cache.** This step calls the method Update Cache of the Business Service LOY Cache Manager Update, which updates the cache.

LOY User Registration Member Process Workflow

The LOY User Registration Member Process workflow, shown in the following image, creates and registers a new member.



Workflow Description. This workflow performs the following actions:

- **Check Member Type.** This step checks the Member Type and calls the following steps accordingly. If the member type is not given, then it displays an error message saying that member type is missing.
- **Insert Account.** This step inserts the account details into the business component.
- **Dup Addr?** This step checks whether the address already exists. If it already exists, then it calls the step Assoc Addr to Account. Otherwise, it calls Insert Address.
- **Assoc Addr to Account.** This step associates the address with the account.
- **Set Primary.** This step sets the primary address for the account.
- **Insert Address.** This step inserts the address for the account.
- **Create Member of Account.** This step creates the member of the type Account.
- **Insert Household.** This step inserts the household details.
- **Dup Addr 2?** This step checks whether the address already exists. If it already exists, then it calls the step Assoc Address to Household. Otherwise, it calls Insert Address2.
- **Assoc Address to Household.** This step associates the address with the household.
- **Set Primary for Household.** This step sets the primary address for the household.
- **Insert Address2.** This step inserts the address for the household.
- **Create Member of Household.** This step creates the member of the type Household.
- **Create Member of Contact.** If the Member Type is Individual, then this step creates a member of type Individual.
- **Insert Travel Profile.** This step associates a travel profile with the member.

Siebel Loyalty Task Flows

The following table describes Siebel Loyalty task flows.

Loyalty Task Flows	Description
LOY Member Lounge Purchase	This task flow enables members to purchase or renew the lounge available for the desired period or duration. Payment for this service can be made in loyalty points or currency or a combination of points plus currency. The custom action used in this task to update member's lounge dates is LoungePurchase.
LOY Member Points Gift	This task flow enables members to give gift points to other members enrolled to the same program. The gift points are first purchased by the primary member and then they are transferred to the recipient. This service might require fees to be paid in currency, as determined in the promotion described in *Creating the Admin - Gift Promotion*.
LOY Member Points Purchase	This task flow enables members to purchase Loyalty points like Miles. Payment made for this service would be in currency. The custom action method used for accruing the purchased points and updating the member's point balance is PurchasePoints.
LOY Member Points Transfer	This task flow enables members to transfer loyalty points from their accounts to any other member's account. The transferee must belong to the same program and tier and membership type. Payment for this service is made in currency. The Custom Action used is TransferPoints. It updates the point balances of transferor and transferee by accruing and redeeming points.
LOY Membership Cancellation	This task flow enables members to cancel their memberships. No payment is involved from the member's side. If the membership was paid for, then the monetary part of the payment can be refunded to the credit card used when the member enrolled. After completing the task, the membership is cancelled. It involves no custom action.
LOY Membership Renewal	This task flow enables members to extend or renew their membership period. Payment is done in loyalty points or pay or Points plus (+) Pay. The custom action used is RenewMembership. It updates membership start and end dates, membership scheme as chosen by the member.
LOY Points Reactivation Task	This task flow enables members to reactivate some or all of their Expired points by paying fees in currency. Members can only reactivate points that expired in a specific time period, specified at the Point Type level. Members can only reactivate non-qualifying point types. This service might require fees to be paid in currency, as determined by the promotion described in *Creating the Admin - Points Reactivation Promotion*.
LOY Promotion Enrollment	This task flow enables members to enroll themselves in promotions that require enrollment. Members might be rewarded with incentives for enrollment, if they have been set up for the promotion. This service might require fees paid in currency, in points, or in a combination of currency and points, as determined by the promotion described in *Creating the Admin - Points Reactivation Promotion*.
LOY Redemption Voucher Reissue	This task flow enables members to reissue redemption vouchers.
LOY Redemption Cancellation	This task flow enables members to cancel redemptions.
LOY Member Enrollment	This task flow enables members to enroll in loyalty programs.

Loyalty Task Flows	Description
Create Accrual Disputes	This task flow enables members to create accrual disputes.
LOY Member Enrollment Payment	This task flow enables members to pay for enrolling in loyalty programs.

LOY Processing Engine Business Service

The LOY Processing Engine Business Service includes the following methods:

- *ProcessBatch Method*
- *ProcessObject Method*
- *SubmitObjectForProcessing Method*
- *UpdateCache Method*

ProcessBatch Method

ProcessBatch invokes the Engine. Depending on the role assumed by this task, the engine enters queue or processing mode by calling the appropriate method.

Input Arguments

None

Output Arguments

None

ProcessObject Method

ProcessObject does real-time (single-object) invocation of the LPE. It processes only the single specified object and returns, and it does not use the queue manager.

Input Arguments

Input Arguments are summarized in the following table.

Name	Value	Description
ObjectType	String	The Type of the Object to process. Valid arguments are: • Transaction • Bucket

Name	Value	Description
		• Tier • Accrual
RowId	Row Id	The Row Id of the Object to Process.

Output Arguments

None

SubmitObjectForProcessing Method

SubmitObjectForProcessing is called when the user clicks the Process button of the UI to process a transaction in real time. If the application is running in server mode, then it submits a synchronous component request to the specified component (with specified workflow and row id). Otherwise, it directly invokes the workflow to process the object in the same thread.

Input Arguments

Input Arguments are summarized in the following table.

Name	Value	Description
Component	String	The name of the component to submit the request to.
ProcessName	String	The workflow to invoke.
RowId	Row Id	The Row Id of the Object to Process.

Output Arguments

None

UpdateCache Method

UpdateCache updates the Promotion in the Cache, if the engine is already initialized.

Input Arguments are summarized in the following table.

Name	Value	Description
ObjectType	String	Type of object to update. If *Program*, then the loyalty program information is updated. Otherwise, promotion information is updated.

Name	Value	Description
ProgramId	Row Id	Target loyalty program to update.
PromotionId	Row Id	Id of the Promotion to load.

Output Arguments

None

LOY Interactive Processing Engine Business Service

The LOY Interactive Processing Engine Business Service includes the following methods:

- *ProcessInteractiveObject Method*
- *InteractiveProcess Method*

ProcessInteractiveObject Method

This method processes the transaction in interactive mode.

Input Arguments

Input Arguments are summarized in the following table.

Name	Value	Description
ObjectType	String	The Type of the Object to process. Valid arguments are: • Transaction • Bucket • Tier • Accrual
RowId	Row Id	The Row Id of the Object to Process.

Output Arguments

None

InteractiveProcess Method

This method is called for processing or simulating a set of transactions.

Input Arguments

Input Arguments are summarized in the following table.

Name	Value	Description
Request Mode	Simulate or Process	Specify whether to process or simulate the transaction.

Output Arguments

None

11 Siebel Loyalty Engine Reference

Siebel Loyalty Engine Reference

This appendix provides information about the Siebel Loyalty Engine. It includes the following topics:

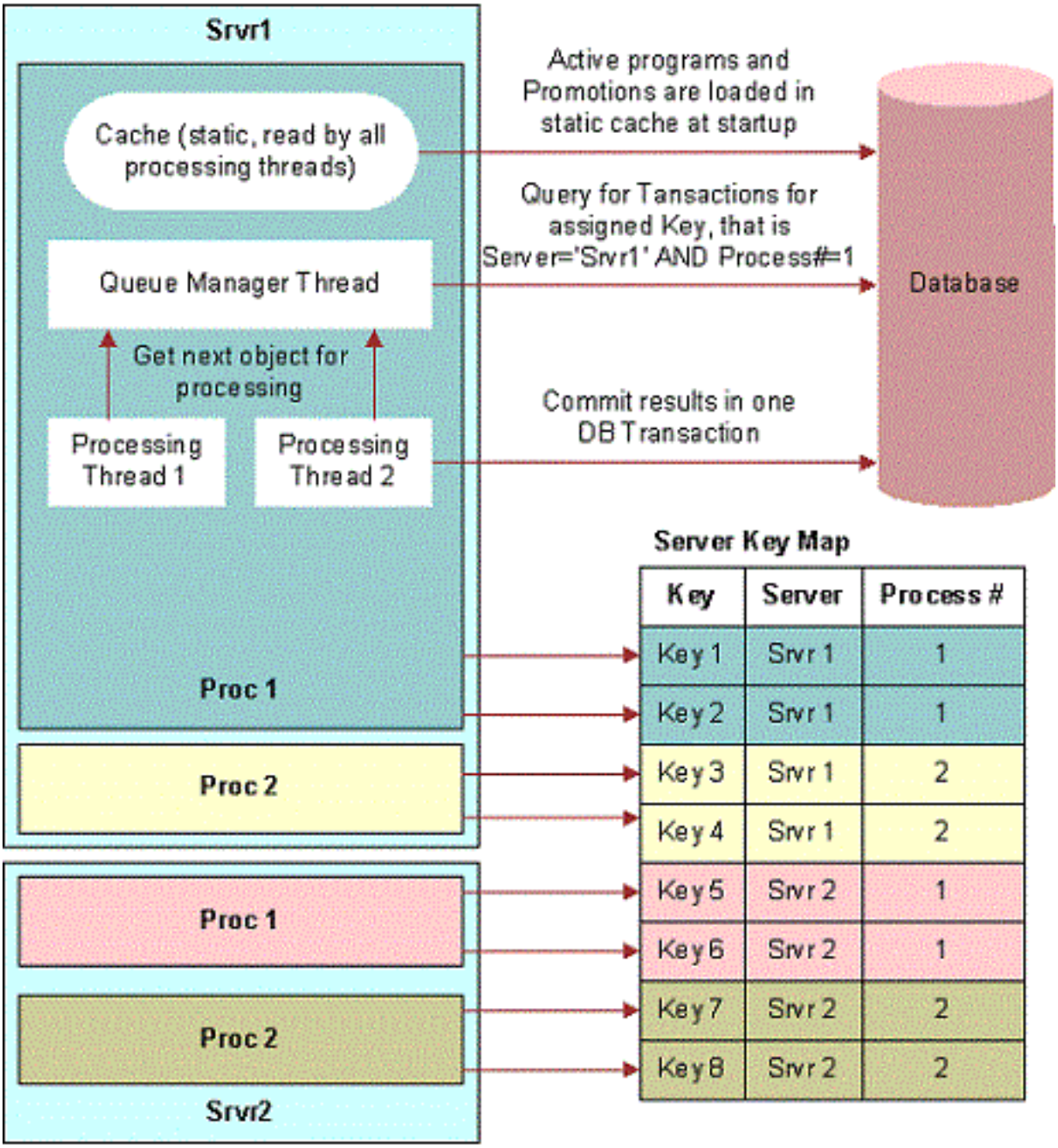
- *Siebel Loyalty Server High-Level Architecture*
- *Siebel Loyalty Engine Object Processing*
- *Siebel Loyalty and Siebel Remote*

Siebel Loyalty Server High-Level Architecture

The Siebel Loyalty Engine can be deployed in two ways:

- Running in the background, continually processing eligible objects such as transactions or tiers.
- Running in a real-time mode, processing requests from clients on demand.

The following image shows the deployment of the Siebel Loyalty Engine batch server component.



The Loyalty Engine has the following high-level architecture:

- The batch component is a multithreaded component that can be deployed to run multiple processes on multiple Siebel Business Application servers.
- Each process processes transactions assigned to the keys that have been registered by that process.
- Within each process:
  - The cache is a static object that is loaded at startup. The cache contains all the active programs and promotions that are required for processing transactions. The cache can be viewed as the main data.

    - Among all the threads, the first thread assumes the role of the queue manager thread. All the remaining threads become processing threads.
    - The Queue Manager thread is responsible for:
    - Acquiring the key to process transactions.
    - Initializing the cache object.
    - Initializing the queue of objects that must be processed by the processing threads.
    - When all the objects are processed and the queue is empty, requerying for new objects to fill the queue.
- The processing threads:
    - Request objects (transactions, tiers) from the queue manager and process them.
    - For each object, commit the results in one database transaction.

For information about how the Loyalty Engine uses server keys, see *Setting Up Server Keys for Siebel Loyalty*. For information about Siebel Loyalty server components, see *Setting Up Server Components for Siebel Loyalty*.

Siebel Loyalty Engine Object Processing

The following table shows the object types processed by the Loyalty Engine, and the business object and primary business component associated with each object. For additional information about the object types, see *Specifying Objects Processed by the Siebel Loyalty Engine*.

Type	Business Object and Primary Business Component
Transaction	LOY Transaction Processor LOY Engine Transaction
Tier	LOY Tier Processor LOY Engine Member Tier
Bucket	LOY Promotion Bucket Processor LOY Promotion Bucket
Accrual	LOY Accrual Expiration Processor LOY Member Accrual Item

The component parameter LOYEngineQueueObjects determines which primary business components of the business objects shown in the previous table are queried for processing. Each of the primary business components has user properties that determine the criteria and sequence of processing.

The following table describes the user properties of the LOY Engine Transaction business component, which illustrate the typical use of user properties by the business components shown in the previous table.

User Property Name	Description
LOY Queue Manager SearchSpec: Batch	The search specification used by the batch component to query for eligible records. In addition to this specification, the engine includes the criteria for the key (server and process number) that has been registered by the process.
LOY Queue Manager SortSpec: Batch	The sort specification to use to determine the order of processing for batch component.
LOY Queue Manager SearchSpec: Realtime	The search specification used by the real-time component to query for eligible records. In addition to this specification, the search also includes the row id of the record to be processed. This means that the record also must meet these criteria in order to be processed in real-time.
LOY Queue Manager SortSpec: Realtime	The sort specification to use to determine the order of processing for the real-time component. Usually empty as only one record is retrieved.
LOY Engine Activate Field *n*	The fields that must be activated by the engine during processing. Each entry in the numbered list of user properties corresponds to a field on the business component. Customers must not remove or inactivate any of these user properties.
LOY Engine Attributes LOV *n*	Each entry in this numbered list of user properties specifies a LOV Type whose values contain a list of fields that must be activated by the engine during processing. Note that these LOV Types are nontranslatable and the Language Independent Code must be the same as the Display Name. Customers must not remove or inactivate any of these user properties.

Siebel Loyalty and Siebel Remote

The transaction logging that is used by Oracle's Siebel Remote is not supported for the tables that are updated by the Loyalty Engine. This limitation applies to all the business components included in the LOY Engine Updater business object. The Log Changes property is set to FALSE on these business components and must not be changed.

12 German GAAP Statutory Compliance for Siebel Loyalty

German GAAP Statutory Compliance for Siebel Loyalty

Information technology systems in Germany must have specific requirements implemented in order to comply with generally accepted accounting principles (GAAP) statutory requirements. This appendix outlines recommendations and necessary parameter settings required to comply with German GAAP standards. It includes the following topics:

- *Process of Reconciling Siebel Loyalty with a General Ledger*
- *Activating the Audit Trail for the LOY Member Business Components*
- *Prohibiting Deleting Members in Siebel Loyalty*
- *Enabling Sequential Numbering of Transactions*
- *Merging Loyalty Members*

Process of Reconciling Siebel Loyalty with a General Ledger

In order to ensure a seamless reconciliation between Siebel Loyalty and a general ledger, the following items must be addressed during the interface design and implementation:

- You must add a BC Field called GL Date to the business components that can initiate financial entries. These business components include: LOY Transaction Accrual Item, LOY Transaction Redemption Item, and LOY Point Block. For more information about creating fields, see *Siebel Tools Online Help* .
- Verify that the interface program is updating the GL Date field with the corresponding Accounting Date from the general ledger.
- It is recommended that the interface programs verify that all transactions which cannot be posted into the corresponding GL Period must be marked as below-the-line items in the general ledger. This goal is accomplished by posting the transactions to a dedicated account.
- For reconciliation purposes, it is recommended that you create separate overview and summary views for the Accrual Item, Redemption Item and Point Block. These must be sorted by GL Date.

Activating the Audit Trail for the LOY Member Business Components

By default, the Audit Trail for Siebel Loyalty-specific Business Components is disabled. In order to meet the regulatory requirements of Germany, you must enable the Audit Trail functionality for the following business components:

- LOY Member Business Component
- LOY Tier Business Component
- Channel Partner Business Component
- Personal Payment Profile Business Component

For additional information, see *Siebel Applications Administration Guide* .

Enabling the Audit Trail for the LOY Member Business Component

In order to enable this business component, you must be logged into Siebel Loyalty as the loyalty administrator with the appropriate rights to modify the Audit Trail configuration.

To enable the audit trail for the LOY Member business component

1. Navigate to the Administration - Audit Trail screen.
2. Activate Audit Trail for LOY Member and enable the following fields:
    - Accrual Member Name
    - Accrual Member Number
    - Auto Accrual Start Date
    - Last Tier Update Status
    - Max Point Loan
    - Max Point Loan Type
    - Name
    - Parent Flag
    - Parent Member Id
    - Parent Member Name
    - Pin Number
    - Primary Address Id
    - Primary Contact Id
    - Start Date
    - Status

Enabling the Audit Trail for the LOY Tier Business Component

In order to enable this business component, you must be logged into Siebel Loyalty as the loyalty administrator with the appropriate rights to modify the Audit Trail configuration.

To enable the audit trail for the LOY Tier business component

1. Navigate to the Administration - Audit Trail screen.
2. Activate the Audit Trail for LOY Tier and enable the following fields:
    - Name
    - PT 1 Required
    - PT 2 Required
    - PT 3 Required
    - PT 4 Required

Enabling the Audit Trail for the Channel Partner Business Component

In order to enable this business component, you must be logged into the Siebel Loyalty as the loyalty administrator with the appropriate rights to modify the Audit Trail configuration.

To enable the audit trail for the Channel Partner business component

1. Navigate to the Administration - Audit Trail screen.
2. Activate the Audit Trail for Channel Partner and enable the following fields:
    - Account Status
    - Name
    - Parent Account Id
    - Partner Type

Enabling the Audit Trail for the Personal Payment Profile Business Component

In order to enable this business component, you must be logged into the Siebel Loyalty as the loyalty administrator with the appropriate rights to modify the Audit Trail configuration.

To enable the audit trail for the Personal Payment Profile business component

1. Navigate to the Administration - Audit Trail screen.

2. Activate the Audit Trail for Personal Payment Profile and enable the following fields:
    - Account Holder
    - Account Number
    - Account Type
    - Billing Address Line 1
    - Billing Address Line 2
    - Billing City
    - Billing Country
    - Billing State
    - Billing Zip Code
    - Credit Card Verification Key Index
    - Credit Card Verification Number
    - Expiration Month
    - Expiration Year
    - Payment Profile Type
    - Valid From Date

    Note: It might also be advisable to activate the audit trail for fields that are used during the order-taking process where payment information is stored.

In addition to the fields mentioned here, it might be necessary to audit other fields added during customization of the Siebel Loyalty product.

Prohibiting Deleting Members in Siebel Loyalty

By default, you can delete members in Siebel Loyalty. In order to prohibit members from being deleted, the No Delete check box of the LOY Member Business Component must be selected. For more information on changing business component properties, see *Siebel Tools Online Help* .

Enabling Sequential Numbering of Transactions

You can sequentially number records in a specified business component. If sequential numbering of transaction records is statutorily required, then you must enable sequential numbering for the LOY Transaction business component. For details on how to create sequence fields, see *Siebel Tools Online Help* .

Merging Loyalty Members

You can merge members.

CAUTION: It is recommended that you do not add fields to the Member List Applet that contain point values, for example, Point 1 Value. If your LOY Member List Applet fields contain point values, then the merge process might not correctly add points.