Siebel Loyalty Administration Guide

Version 8.0

December 2006

ORACLE®

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1 What's New in This Release

What's New in Siebel Loyalty Administration Guide, Version 8.0

Table 1 lists changes described in this version of the documentation to support release 8.0 of the software.

Table 1.   New Features in Siebel Loyalty Administration Guide, Version 8.0

Topic	Description
"Setting Up Retroactive Tier Changes" on page 96	Added this topic describing configuration to allow retroactive tier changes.
"Creating Retroactive Tier Member Attributes" on page 96	Added this topic describing how to create retroactive tier member attributes.
"Creating Retroactive Tier Member Tier Attributes" on page 97	Added this topic describing how to create retroactive tier member tier attributes.
"Creating Retroactive Tier Transaction Attributes" on page 98	Added this topic describing how to create retroactive tier transaction attributes.
"Setting Up Retroactive Tier Rules" on page 99	Added this topic describing configuration for retroactive tier rules.
"Creating the Admin - Retro Accruals Base Promotion" on page 107	Added this topic describing how to create the Admin - Retro Accruals Base promotion.
"Cancelling Loyalty Members' Transactions" on page 217	Added additional information detailing enhancements to the Cancel Transaction functionality.
"German GAAP Statutory Compliance for Siebel Loyalty" on page 263	Added a new appendix describing configuration required to comply with German GAAP standards.

2 Overview of Siebel Loyalty

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

■ "About Siebel Loyalty" on page 11

■ "Siebel Loyalty Life Cycle" on page 12

About Siebel Loyalty

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

■ 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 may give members bonus points for purchasing a specific product during a specific month.

■ A program may 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 loyalty programs can be:

■ **Individuals.** An individual person is the member. Each individual has a unique Membership #. Most business-to-consumer loyalty programs, such as programs for airlines, hotels, and retailers, enroll individuals as members.

■ **Households.** A household is the member. Each household has a unique Membership #. 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 loyalty program, so the household gets the bonus no matter which member of the family makes purchases.

■ **Accounts.** A company or an organization it the member. This 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:

■ **Your Employees.** Your salespeople and member service representatives can enroll customers as members in loyalty programs, sell products that give rewards to members, redeem members' rewards, and resolve members' service requests. 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.** Your partners can use the Siebel Loyalty Partner Portal to work with Siebel Loyalty through the Web. If it is appropriate to your business model, partner companies can deal with members in the same way that your own employees can. For example, in the automobile industry, it is typical for dealers to sell products to customers and enroll customers as members in reward programs. Loyalty programs can also be aimed at partners. For example, you can reward partners based on their sales of your products.

■ **Customers and Members.** Customers can use the Siebel eLoyalty to sign up as members in programs through the Web. Members can use eLoyalty to check their point totals, redeem their rewards and perform other activities through your Web site.

All of these users share information in the same database, and they are all able to view information that the others entered when appropriate. For example, when members use eLoyalty to self-enroll, your employees can see the information they entered, so you can provide these members with service.

Siebel Loyalty Life Cycle

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

Design of a Loyalty Program

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

Depending on your business model, you may want to increase the frequency of a customer's interactions, the total dollars 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 may find that 10 percent of its customer base generates more than half its total revenue. When the airline recognizes that frequent flyers are the major source of revenue, it can design a loyalty program to appeal to them, which would increase the frequency of their transactions.

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

Implementation of a Loyalty Program

Implementing a loyalty program involves:

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

■ **Setting Up Programs.** You can design one or more loyalty programs, such as frequent flyer programs for airlines, bonus point program for supermarkets, or other programs appropriate to your industry. For more information, see Chapter 4, "Setting Up Siebel Loyalty Programs."

■ **Setting Up Promotions.** Within the program, you can design special promotions, such as extra bonus points to encourage customers to buy a new product that you are trying to promote or to make purchases during the slack season. For more information, see Chapter 5, "Setting Up Siebel Loyalty Promotions."

Measurement of a Loyalty Program's Results

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

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

■ How much these transactions have increased.

■ What effect the increase has had on revenue and earnings.

■ What is the ROI of the program (the increase in earnings divided by the cost of implementing the program).

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

Like the design phase, the measurement phase can use Oracle Business Intelligence.

3 Getting Started with Siebel Loyalty

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

About Getting Started with Siebel Loyalty

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

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

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

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

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

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

Configuration of Siebel Loyalty

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

- "Creating Point Types for Loyalty Programs" on page 16
- "Allowing Additional Fields to Control Loyalty Points Given" on page 18
- "Changing the Fields Used in Loyalty Attributes" on page 19
- "Allowing Manual Processing of Queued Loyalty Transactions" on page 20
- "Setting Up Points Loan Repayment" on page 21
- "Setting Up Loyalty Member Merge" on page 22
- "Allowing Users to Change Values of Loyalty Member Attributes" on page 23

Creating Point Types for Loyalty Programs

A *point* is a loyalty program's currency. Members earn points for completing a desired action (such as completing a flight or referring a friend to the program). They then use these points to purchase products or services.

Most loyalty programs only have one point type. For example, most airlines' frequent flyer programs have one point type. Within that point type, they have qualifying points that count toward tier status and non-qualifying points, also called bonus points, that do not count toward tier status. But these are still one point type. The qualifying and non-qualifying points are added together to calculate the total available balance of that point type, which can then be used for redemptions.

Other companies may have multiple point types. For example, multiple point types could be used in a joint individual/account loyalty program, with one type of points going to individuals and another going to accounts, and 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 had 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 should be created 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 there should be two point types. The first point type is the standard points that can qualify for the member for tier status and can also be used for redemptions. The second point type tracks the number of stays, with the member getting 1 point for each stay; these points cannot be used for redemptions, but they can qualify a member for a tier.

For more information about point types, see "Defining Point Types for Loyalty Programs" on page 58.

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 three point types created in the data model and UI. A fourth point type is already in the data model, but is not exposed in the UI. You can configure the product to create additional point types. You should be familiar with Siebel Tools before performing this task. For more information about Siebel Tools, see *Using Siebel Tools*. For more information about modifying lists of values, see *Siebel Applications Administration Guide*.

NOTE: If your loyalty programs use only one point type, the administrator should create only one point type and you should configure the product to hide the other point types, for example in the Member > More Info view.

This section gives you general instructions on how to add more point types.

To add a new point type

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

Table	Column to Copy	New Column Name	Type	Length
S_LOY_MEMBER	POINT_TYPE_D_VAL	POINT_TYPE_E_VAL	Number	22
S_LOY_MEMBER	LFTM_PT_TYPE_D_VAL	LFTM_PT_TYPE_E_VAL	Number	22
S_LOY_MEM_TIER	POINT_TYPE_D_VAL	POINT_TYPE_E_VAL	Number	22

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

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

3 In your Siebel application, in the Administration - Data > List of Values view, add the following value to the list of values list:

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

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

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

Allowing Additional Fields to Control Loyalty Points Given

Without configuration, you can use the following fields to define in the Administration - Products > Points view many base points per product a member receives for an accrual transaction or needs to use for a redemption transaction: Partner, Departure Airport, Departure Zone, Arrival Airport, Arrival Zone, Booking Class, Roundtrip. For accruals, base points are the number of points that a member earn for completing an accrual transaction, regardless of tier status, other applicable promotions, and so on. For redemptions, base points are the number of points required to purchase this product.

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 Expose these new fields 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 is the pop-up pick list that 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, the application displays a query form, the user enters the desired characteristics of the product there, and then the application displays the Base Points pop-up picklist with the applicable point values.

❑   If you want it to go directly to the Base Points pick list, clear the Auto Query value (which is currently Query).

❑   If you want to keep the Query, update the pop-up query applet (Applet Web Template mode) to include the new fields.

3   In your Siebel application, in the Administration - Data > 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 Booking Class = Y, it should automatically fill in Booking Class = Y on the Transactions List Applet.

a   Use pick maps to copy the value.

b   The pick map should have values Field = <name of the field in the Transaction Business Component> and Picklist Field = <name of the Booking Class field in the Product Points Business Component>

c   Do this for every field that should be copied from the Product Points Business Component to the Transaction Business Component.

Changing the Fields Used in Loyalty Attributes

Attributes are used in promotion rules. For more information, see *"Creating Attributes for Loyalty" on page 137*.

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.

Table 2 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.

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

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

NOTE: The values for the Type field in Table 2, and other samples in the sections that follow, are seed data that is supplied with your Siebel 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.

NOTE: Each entry in the List of Values Administration view should 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 Loyalty Transactions

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

Some Loyalty transactions are created with the status of Queued, which means that they are processed in batch mode by the Loyalty engine and are not processed when the user clicks the Process button.

For example, when a member creates 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.

To allow manual processing of Loyalty 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 configuration, 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 will be created with a status of Acceptable, so they can be processed manually.

Allowing Transactions to Be Processed Both Manually and Automatically

Without configuration, 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 will not have to wait for the batch engine to run for Queued transactions to be processed. They will have the option of either waiting for the batch engine or clicking Process to process the transaction immediately.

To do this, 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

Your company can, at its discretion, loan points to its members. For details of how this is done, see "Lending Points to Loyalty Members" on page 224. 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 spec that the workflow takes as its input.

The search spec identifies members that 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.

To set up the search spec 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	Comments
Component/Job	Select Workflow Process Batch Manager.

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

Field	Comments
Name	Select Workflow Process Name.
Value	Enter the name of the workflow the search spec will apply to; in this case, LOY Loan Repayment.

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

Field	Comments
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 top of the screen and click Start.

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

Setting Up Loyalty Member Merge

Users can merge the records of two or more Loyalty 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" on page 227.

Allowing Users to Change Values of Loyalty Member Attributes

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

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

You can configure the product to do this in either of 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*.

Setting Parameters for the Loyalty Engine

You can customize the Loyalty Engine parameters shown in Table 3. All these parameters apply to eLoyalty Processing Engine – Batch. They affect batch processing, not realtime processing.

Table 3.   Parameters for the Loyalty Engine

Name	Display Name	Default Value	Description
LOYEngineNumberOfRuns	LOY - Engine Number of Runs	5	The number of time to query after the queue becomes empty. This parameter should have a -1 or > 0 value. If -1, then the engine keeps running indefinitely until it is shut down. Otherwise, it will query the number of times specified after the current query has run out of records.
LOYEngineQueueObjects	LOY - Engine Queue Objects	Transactions: 90 Buckets: 10	The objects to process in the Queue and the number of objects to place in the queue each time. This is in the format Object1: n,Object2: m listing each object to process and the number of objects. For a list of objects processed by the engine, see Table 4.
LOYEngineSleepTime	LOY – Engine Sleep Time (secs.)	10	The time (in seconds) which the engine waits after it has processed the records and there are no more records in the next query. After sleeping for this time, it requires.

Parameters are commonly used in the following ways:

■ "Specifying Objects Processed by the Loyalty Engine" on page 25

■ "Specifying How Often the Loyalty Tier Engine Runs" on page 25

■ "Specifying How Often the Loyalty Point Expiration Engine Runs" on page 26

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 >Tier Class >Tiers view. For more information, see "Defining Tier Classes and Tiers" on page 61.

Specifying Objects Processed by the Loyalty Engine

You can specify which objects the Loyalty Engine processes by using the parameter LOYEngineQueueObjects. For more information about this parameter, see "Setting Parameters for the Loyalty Engine" on page 24.

The Loyalty Engine processes the object types shown in Table 4.

Table 4.   Object Types Processed by Loyalty Engine

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 if 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.

Specifying How Often the Loyalty Tier Engine Runs

You can set parameters to specify how often the tier engine runs. For example, it can run weekly, daily, or hourly. This applies to the application, not to individual programs.

To do this, set the following parameters for the Batch Component eLoyalty Processing Engine – Batch(LoyEngineBatch):

■ LOYEngineQueueObjects = "Transaction: 30,Bucket: 10,Tier: 30"

■ LOYEngineNumberOfRuns = -1

For more information about these parameters, see "Setting Parameters for the Loyalty Engine" on page 24.

Specifying How Often the Loyalty Point Expiration Engine Runs

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

To do this, set the following parameters for the Batch Component eLoyalty Processing Engine – Batch(LoyEngineBatch):

■ LOYEngineQueueObjects = "Transaction: 30,Accrual: 10,Tier: 30"

■ LOYEngineNumberOfRuns = -1

For more information about these parameters, see "Setting Parameters for the Loyalty Engine" on page 24.

Setting Up Server Keys for Siebel Loyalty

Server keys are used for batch components, not for realtime components. For more information about batch and realtime components, see "Setting Up Server Components for Siebel Loyalty" on page 29.

Server keys are used for two reasons:

■ To distribute members across different servers and processes, for load balancing.

■ To make sure that only one process is processing a member at any time. (Within the process, the engine makes sure that only one processing thread is processing a member at any time.)

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

Using Server Keys for Load Balancing

The number of different keys you should define depends on:

■ The number of servers available.

■ The number of processes that can run on each server.

■ The number of keys you assign to each server - process number combination.

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

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

It is possible to create only five keys and assign them to the five available server processes, as shown in Table 5.

Table 5. The Smallest Number of Keys You Can Define for Five Processes

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

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

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

To set up server keys

1 Navigate to the Loyalty Program Administration screen.

2 In the link bar, click Server Key Map.

3 In the Server Key Map list, add a record for each server key and complete the necessary fields, which are described in the following table.

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

To balance the load on servers

1 Navigate to the Loyalty Program Administration screen.

2 In the link bar, click Server Key Map.

3 In the Server Key Map list, change the server name (if necessary) and the process number for some of the keys being processed by overloaded server processes.

Registering New Components as Keyed or Unkeyed

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

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

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

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

■ LOY_ENGINE_COMPONENT_KEYED

■ LOY_ENGINE_COMPONENT_UNKEYED

To create a Loyalty Batch Engine, the type must be Business Service Manager. Use the following syntax:

```
create component definition Loy1 for component type "Business Service Manager" component
group LoyaltyEngine run mode Batch full name "Loy1" description "Loy1" with parameter
LOYEngineSleepTime = 5
```

Assignment of Server Keys to Loyalty Members

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

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

Table 6. User Properties that Control Key Generation

Business Component	User Property Name	Description
LOY Member	Auto Generate Key Flag	Y or N to indicate if key should be automatically generated. If not defined, then defaults to Y.

Table 6.   User Properties that Control Key Generation

Business Component	User Property Name	Description
LOY Server Key Map	Auto Generate Key SearchSpec Search	Search specification for keys to consider for assignment. Customer can specify a search spec 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 configuration, it sorts in ascending order based on the Number of Members field.

Setting Up Server Components for Siebel Loyalty

There are two server components defined for the Loyalty engine:

■ **eLoyalty Process Engine - Realtime.** Processes the requests from users when they click the Process button to process a transaction or tier. For each request submitted from a client, a separate Siebel task is started that processes the object exits when done.

■ **eLoyalty Process Engine - Batch.** Performs back-end processing. Once started, this component runs in the background and processes objects as they are created in the database. Each of its Siebel tasks continue to wait for objects to process until the component or server is shut down.

Setting Up the Realtime Server Component

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

For information about setting up a second realtime server component, see .

NOTE: If your company has multiple Siebel applications installed, these parameter settings will only affect Siebel Loyalty, and not any of the other applications.

Parameters of the Realtime Component

You should set the following parameters for the realtime component:

■ **Maximum Tasks.** This parameter determines the maximum number of tasks the component can run. Set its value based on the number of users who will be using realtime processing through the user interface.

■ **MinMTServers** and **MaxMTServers.** Set the value of these two parameters to one. This is because only one process should be running for this component in the enterprise.

Running the Realtime Component in Synchronous and Asynchronous Mode

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

■ **Synchronous.** The client waits for transaction processing to be completed before control is returned to the client. The user cannot do anything until the processing is completed. When control is returned to the user, the record reflects changes such as change in status or number of points.

■ **Asynchronous.** The client submits a transaction and control returns to the client immediately. The user can continue working, but the user must requery the transaction to see if the processing is completed (by looking at the Status) and to check the results.

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

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

To configure the processing mode

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

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

Setting Up the Batch Server Component

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

Parameters of the Batch Server Component

You can configure the batch server component by changing the parameters that are used in processing, which are summarized in Table 7. All of the parameters in this table apply only to eLoyalty Processing Engine - Batch.

Table 7.   Parameters Used in Batch Processing

Name	Display Name	Default Value	Description
LOYEngineNumberOfRuns	LOY - Engine Number of Runs	5	The number of times to query after the queue becomes empty. This parameter should the value -1 or > 0. If -1, then the engine keeps running indefinitely until it is shut down. Otherwise, it will query the specified number of times after the current query has run out of records.
LOYEngineNumberOfTasks	LOY - Engine Number of Tasks	0	The number of processing threads that will be 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 will be started either. If 4, then 4 processing threads plus one queue manager thread will be started for each MT server.
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.

Table 7.   Parameters Used in Batch Processing

Name	Display Name	Default Value	Description
LOYEngineSearchSpec	LOY - Engine Search Specification	None	Currently not supported. Reserved for future use.
LOYEngineSleepTime	LOY - Engine Sleep Time (secs.)	10	The time (in seconds) for which the engine should wait after it has processed the records and there are no more records in the next query. After sleeping for that time, the engine will requery.

Starting the Batch Server Component

The batch component must be started whenever the server is started. You can automate this process by using a workflow included in the product, which can be invoked on server startup 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 will cause unnecessary paging and using too few threads will cause 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" on page 26.

To initialize 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 (# of processes on server) x (1 + # of Processing Threads/Process)

b   Submit this number of component requests for the eLoyalty Processing Engine - Batch.

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

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

Creating a Second Realtime Engine Component for Siebel Loyalty

If you have a heavy load of realtime transactions, you can create a second Loyalty realtime engine on a second Siebel Server, in order to spread the load and improve performance.

The following steps show how to create a second realtime engine component and create a second Process button in the interface to call this new realtime engine component, so you can confirm that the new engine is being called.

In an actual business situation, you would create the second realtime engine and configure the application so that the load balancing occurs in the background, determining which engine to call.

Creating a New Realtime Engine Component

First create the new realtime engine component.

To create a new realtime engine component

1 Navigate to Administration - Server Configuration > Enterprises view.

2 Click the Component Definitions view tab.

3 In the Component Definitions list, query for *eLoyalty Processing Engine - Realtime*.

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

Field	Value
Component	eLoyalty Processing Engine - Realtime2
Alias	LoyEngineRealtime2
Component Type	Workflow Process Manager (Batch)
Component Group	Siebel Loyalty Engine
Run Mode	Batch
Description	Second Loyalty Realtime engine

CAUTION: The Component Type for the existing real time engine definition is "Business Service Manager (Batch)". For the new record you do not select this, instead select the Workflow Process Manager (Batch). When you save the record the Component Type is changed to the "Business Service manager (Batch)".

5 Next check the component parameters for this new record against the original, and change the parameters as necessary to match the original.

6 Click Enable.

7 Stop and restart the Siebel and gateway servers, so that the new component appears.

8 Disable duplicate server components:

    a Navigate to Administration - Server Configuration> Servers.

    b Select the first Siebel server and query in the Components list for *Loy*.

    c Select *eLoyalty Processing Engine - Realtime 2* component and click *Disable*.

    d Select the second Siebel server, select the *eLoyalty Processing Engine - Realtime* component and click *Disable*.

Now one realtime engine is on each Siebel servers.

9 Register the new component as unkeyed:

    a Navigate to Administration - Data > List of Values view.

    b Query for Type = *LOY_ENGINE_COMPONENT_UNKEYED*.

    This record should have the display value and language independent code set to LoyEngineRealtime.

    c Create a new record with the same details except that the display value and language independent code are LoyEngineRealtime2.

    This record refers to the new component, enabling the cache to be refreshed for the new second real time engine when a promotion is activated.

10 Synchronize the servers:

    a Navigate to Administration - Server Configuration > Enterprises view.

    b   Click the Synchronize view tab.

    c   Click Synchronize.

       This allows the enterprise to know where all the batch components are located.

11 Stop and restart the Siebel and gateway servers and gateway and restart.

Adding a New Process Button to Call the New Realtime Engine

Now you must use Siebel Tools to create a new Process button in the interface to call this new
realtime engine component.

You should do this only if you have experience using Siebel Tools.

To add a new process button to call the new realtime engine

1 In Siebel Tools, create a new workflow to call the new realtime engine:

    a   Locate the workflow *LOY Engine - Process Object*.

    b   Copy this and name the copy *LOY Engine - Process Object 2*.

    c   Click the workflow step.

    d   In the workflow, select the step *Invoke Submit Object*.

    e   Select the workflow step I/O argument *Component*.

    f   Change the Value/Search Specification from LoyEngineRealtime to LoyEngineRealtime2.

       NOTE: If you cannot make this change directly, you can do the following: export the new
       workflow, delete it from Tools, open the xml file and locate LoyEngineRealtime, change
       occurrences to LoyEngineRealtime2, and import the new workflow.

    g   Click Deploy.

2 In your Siebel application, activate the workflow:

    a   Navigate to Administration - Business Processes> Workflow Deployment.

    b   Query in the Active Workflow Processes list for *LOY Engine - Process Object**.

       Only one record should appear, the original workflow.

    c   Query in the Repository Workflow Processes list for *LOY Engine - Process Object**.

    d   Select the workflow *LOY Engine - Process Object 2* and click Activate.

3 Create new named methods:

    a   In Siebel Tools locate the LOY Transaction List Applet.

       This applet has a control called *ButtonProcessObject* which invokes the method *ProcessTxn*.

    b   The *LOY Transaction* business component, which the applet is based on, create the following user
       properties:

       ❏   Named Method 11. ProcessTxn2, INVOKE, LOY Transaction, WriteRecord

❑ Named Method 12. ProcessTxn2, INVOKESVC, LOY Transaction, Workflow Process Manager, RunProcess, ProcessName, LOY Engine - Process Object 2, LOYObjectId, [Id], LOYWorkflow, LOY Engine - Process Transaction, LOYObjectStatusLIC, [Status LIC], LOYRequiredStatusLIC, Acceptable, LOYStatusLOV, LOY_TXN_STATUS_CD

❑ Named Method 13. ProcessTxn2, INVOKE, LOY Transaction, RefreshBusComp

❑ Named Method 14. ProcessTxn2, INVOKE, LOY Member, RefreshRecord

❑ Named Method 15. ProcessTxn2, INVOKE, LOY Member Attribute, RefreshBusComp

❑ Named Method 16. ProcessTxn2, INVOKE, LOY Promotion Bucket, RefreshBusComp

4 Create the new button:

a In Siebel Tools, in the applet LOY Transaction List Applet, copy the control ButtonProcessObject.

b Change the caption to ProcessTransactions.

c Change the Method Invoked to ProcessTxn2.

d Add the new button to the Edit List Template.

5 Create the modified application:

a Compile the .srf.

b Stop the services.

c Copy the .srf.

d Start the services.

6 Test the modified application.

The Process button should call LoyEngineRealtime and the Process Transactions button should call LoyEngineRealtime2. You can increase the logging on these components to verify that the correct ones are called.

Setting Up Products for Payment with Loyalty Points

You must set up products to allow members to get these products by redeeming loyalty points. In the product record, you must specify how many points the product is worth.

In addition, you can set up products so members can pay for products with a combination of points and currency. In the product record, you must specify how many points the product is worth and 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, the system 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 a product for payment 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.

The system 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 bottom 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 bottom of the screen, make sure the More Info view tab is selected and click Points in the link bar.

9 In the list, find the redemption transaction you want to set up, and complete the necessary fields. Some fields are described in the table that follows.

Field	Comments
Points	Enter the total number of points needed to cover the redemption in full.
Cost Per Point	Optionally, if you want to allow the product to be redeemed for a combination of points and currency, enter amount of money assigned as the cash value of one point.

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

Optimizing Loyalty Point Block Updates

For Assign Points actions, the points are associated with point blocks. Usually a host would have one point block for base accruals and one point block for each partner. In other words, the number of point block records is small.

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

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

To optimize loyalty point block updates

1 Navigate to the Administration - Application > 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, this should be a number > 0. It indicates that the engine should batch the point block updates and apply it to the point block only after this many transactions have been processed.
LOYPointBlockBatchPercent	If specified this should be a number > 0 and < 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 will effectively turn off the batching for the point block records whose remaining balance is below the specified percentage value. For other point block records, it will use 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 will be updated 10,000 times, slowing performance.

As an example, suppose the system preferences are set to:

■ LOYPointBlockBatchSize = 50

■ LOYPointBlockBatchPercent = 2

For the first 9,800 transactions (100-2=98%), the engine will batch the updates and only apply updates after every 50 transactions, resulting in 196 updates (9,800/50) instead of 9,800. This will reduce 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+200), as compared to 10,000 without these parameters. There will be contention during processing of the final 200 transactions, but this will happen for only 2% of the transactions.

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

Server Process Termination and Recovery with Optimization

As the 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 system record is added to the parent record used amount and is reset to zero for the system record. This is called point block synchronization. Synchronization is also done in the following conditions:

■ If the engine crashes or the server is brought down abruptly, no information is lost. The next time the engine starts, the synchronization is done again.

■ If the engine is terminating normally, the engine does the synchronization before exiting. So, all system point block records will have a used amount of 0. (Note that these records are not exposed in the user interface).

■ If the engine is running in a continuous mode (LOYEngineNumberOfRuns = -1) and there are no more transactions to process and the engine is going to sleep.

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.*

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 sections describe how to define the lists of values that are most commonly customized:

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 > 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	Comments
Type	Enter LOY_MEMBER_CARD_TYPE.
Display Value	Enter the name of the card type. This name will be displayed in the list of values for this membership card type.
Language-Independent Code	Enter the Language Independent Code for the card type.
Language 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 Loyalty groups, classes, and phases

1 Navigate to the Administration - Data > 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 groups, classes, and phases

1 Navigate to the Administration - Data > 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 groups, classes, and phases

1 Navigate to the Administration - Data > 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 Lounges

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

To define Loyalty groups, classes, and phases

1 Navigate to the Administration - Data > 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 Codes

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

To define airport codes

1 Navigate to the Administration - Data > 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.

Adding Employees as Loyalty Users

You add employees as users and define their reporting hierarchy for Siebel Loyalty as you do for other Siebel 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 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 > 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	Comments
Name	Enter the name of the host organization (your company).
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 Chapter 7, "Using Siebel Loyalty with Partners."

To set up partner access to Siebel Loyalty:

■ **Set up Siebel PRM.** Follow the instructions in the section about setting up Siebel PRM in *Siebel Partner Relationship Management Administration Guide*. This section contains high-level instructions for installing, configuring, and controlling visibility.

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

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

■ "Setting Up Loyalty Partner Point Conversion" on page 43

■ "Mapping Loyalty Partner Tiers to Company Tiers" on page 44

■ "Selling Loyalty Points to New Partners" on page 44

Setting Up Loyalty Partner Point Conversion

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

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

You must agree with a partner on a conversion factor, which you 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" on page 43.

Mapping Loyalty Partner Tiers to Company Tiers

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

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

This task is a step in .

To map the partner's tiers to your company's 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 tiers list for each of the partner's tiers, and enter information about the tier. Some fields are described in the following table.

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

Selling Loyalty Points to New Partners

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

For more information about selling points to partners, see .

This task is a step in .

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 Chapter 8, "Member Self-Service with Siebel eLoyalty."

Setting Up Member Access

To allow customers members to use the Loyalty Member Portal:

■ You must set up authentication, access, and data privacy.

■ You can configure the Member Portal so it has the same look and feel as your company Web site.

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

For more information about providing access to the Member Portal, see *Siebel eSales Administration Guide* and see "Troubleshooting Display of the Catalog and Products to Loyalty Members" on page 248.

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, points and currency, or currency. If the product itself is purchased just with points, the member may still have 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 Loyalty 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 the Processing Status for Loyalty Transactions

You can see if a transaction has succeeded or the reason it has been rejected by using the Processing Info view. This is useful while you are setting up and testing the product. You can also create responsibilities that expose this view to member service representatives, so they can see which promotions applied to a transaction, how many points each promotion gave, why a transaction was rejected, and so on.

To view the result of a loyalty 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.

■   **Status and Substatus.** These fields have the possible values described in Table 8.

■   **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 is available only if the error occurred in the context of an action or criteria. This field can contain generic or Loyalty-specific error messages. The Loyalty-specific error messages are described in Table 9.

NOTE: The Status field is in the top applet. 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, grouped based on the reason they did not qualify.

Table 8.   Status and Substatus Field of Processing Info View

Status	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 is not necessarily an error condition, but may 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 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.
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 criteria 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 engine. This can happen when there is some problem in the SRF such as a field on the business component is not properly configured and the engine attempts to use that field.

Table 9.   Loyalty-Specific Error Messages in the Processing Error Info Field

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

Table 9.   Loyalty-Specific Error Messages in the Processing Error Info Field

Error Message	Description
The Member does not have any Tiers that can qualify as a Dominant Tier.	**Reason:** All members should have a dominant tier. If not, then this error occurs when engine is trying to evaluate the expiration date of an accrual. **Solution:** Make sure the member has a dominant tier, described in "Defining Tier Classes and Tiers" on page 61.
The object type $$$ is not supported by the Loyalty Processing Engine.	**Reason:** This error indicates that the value of the component parameter LOY - Engine Queue Objects specifies an object type that is not supported. **Solution:** Check the value of the Component Parameter to ensure it uses valid object types.
The parameter $$$ required by the Loyalty Engine is not defined. Please check your system configuration.	**Reason:** This error indicates that the value of one of the component parameters is not specified or is specified but has an unacceptable value. **Solution:** Check to see if 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 loyalty server key definition of your system.	**Reason:** This error indicates that the Siebel Enterprise has more processes running for the batch component as compared to the number of unique Server - Process # combinations. **Solution:** 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.	**Reason:** This error indicates that the engine is looking for a promotion that is not active. **Solution:** This is most likely to happen in two scenarios - tier processing during which the engine looks for the promotion for that tier and the promotion is inactive. The other scenario is when a promotion gets activated just during the engine startup process. Users should avoid activating/deactivating promotions when the engine is being started.
The value of the parameter %1 required by the Loyalty Engine is incorrect. Please consult your documentation for additional information.	**Reason:** This error indicates that the value of one of the component parameters is not specified correctly. **Solution:** Check to see if the parameter mentioned in the error message has an acceptable value.

Table 9.   Loyalty-Specific Error Messages in the Processing Error Info Field

Error Message	Description
There are not sufficient points available to redeem.	**Reason:** This error indicates that the member does not have sufficient points to redeem. This is an acceptable cause for failure of transaction processing. **Solution:** Check the member's available balance and verify if the member should be making the redemption.
There are not sufficient points in the Point Blocks to accrue points for the member.	**Reason:** This error indicates that the partner does not have sufficient points to accrue from for the member and has run out of points. **Solution:** Check the point blocks for the partner on the promotion mentioned.

4 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

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

- Airline frequent flyer programs that give members bonus miles or that give members discounts on hotel stays or car rentals.

- Supermarket programs that give bonus points to shoppers.

- Programs that give bonus points to retailers based on their sales of a manufacturer's products.

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 things such as contacts, accounts, and products can be used across multiple programs.

Most companies have one loyalty program. A company may 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), the 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 should analyze your customer base to see which customers the program should be designed to appeal to. For example, if an airline finds that half of its revenues come from 10 percent of its customers, it would design the program to appeal to these frequent flyers. For more information, see "Siebel Loyalty Life Cycle" on page 12.

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

About Loyalty Program Points, Tiers, and Rewards

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

■ Redeeming points for rewards

■ Qualifying for tier status

Redeeming Points for Rewards

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

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

Qualifying for Tier Status

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

Most loyalty programs give members two types of points:

■ **Qualifying points.** Can be redeemed for rewards and also count toward earning tier status.

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

The total points a member has available for redemption equal the sum of the qualifying and nonqualifying points the member has earned.

Expiration of Points

Points that are given to members always have an expiration date. The expiration date can be set at these levels:

■ **Tier.** Expiration date must always be set for a tier. It applies to points members earn while they are part of this tier.

■ **Promotion.** Expiration date is optional for promotions. If it is set, it overrides the dates set at the tier level.

A point's expiration date is always maintained. However, if the 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 cancelled, the points that were given are returned to the original point block and can then be given to another member. If a point expires, 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.

Do not confuse a point's expiration date with a point block's start and end dates, which control when points can be taken from a point block. Transactions with a transaction date after a point block's end date cannot debit points from that point block, even if the point block still has points left. However, points that already have been taken from the point block and given to members do not expire after the end date.

About Base Promotions and Tier Promotions

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

Tier promotions moves members to the appropriate tier level based on the member's points or behavior. For example, they can upgrade, downgrade, or requalify members. For more information, see "Creating Tier Promotions" on page 67.

Base promotions perform the basic processing for the program, such as adding points to members' balances when they perform accrual transactions. For more information, see "Creating Base Loyalty Promotions" on page 72.

About Promotion Calculation Rules for Loyalty Programs

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

If several promotions apply to one transaction, loyalty programs can give the member the 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, the member will receive that promotion even if it would not be included according to the promotion calculation rule.

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

■ **Maximize by Promotion.** Only one promotion applies, which is the promotion that is most beneficial for the member. If all promotions generate the same type of points, the one with the largest number of points applies. If the promotions generate different types of points, some qualifying and some nonqualifying, the program decides which is most beneficial to the member by calculating a weighted average of the points awarded by different promotions; loyalty administrators determine the weighting when they define the point types.

■ **Maximize by Point Type.** Only one promotion applies per 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 non-qualifying 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 non-qualifying points of each type. The calculation is similar to Maximize by Point Type, except that qualifying and non-qualifying points for each type are calculated and awarded separately.

■ **All Promotions Apply.** The member receives the combined total of all points from all 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, the customer gets a total of 150 percent bonus points.

Example of Promotion Calculation Rules

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

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

The promotion calculation rules determine how the other promotions apply. The weighting used by these rules is shown in Table 10.

Table 10.   Weighting Used by Promotions in Example

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

The last three columns of Table 11 show which points the member receives if you use different promotion calculation rules. In addition to Promotion 1, which always applies, the following promotions apply:

■ **Maximize by Promotion.** Promotion 4 applies, because it has the maximum weighted average for Base points and Bonus points.

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

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

Table 11.   Points Applies with Different Calculation Rules

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

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 may have ended and the member may 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 the system to accurately calculate the member's future accruals.

For more information, see .

Example of Retroactive Tier Changes

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 where processed during the qualifying period. In this example, this late transaction increased the qualifying points for the member to 65,000 and entitles the member to remain in silver tier for another year. The member's points, however, are still reset to 0 after the retroactive tier change.

Process of Setting Up Loyalty Programs

NOTE: A new loyalty program may require different lists of values from existing loyalty programs. For example, it may use different membership card types. If so, before you start this process, create the needed lists of values, as described in "Defining Lists of Values for Siebel Loyalty" on page 39.

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

1 "Creating Loyalty Programs" on page 56

2 "Defining Program Level Attributes for Loyalty" on page 57

3 "Defining Point Types for Loyalty Programs" on page 58

4 "Minting Point Blocks for Loyalty Programs" on page 59

5 "Defining Tier Classes and Tiers" on page 61

6 "Creating Tier Promotions" on page 67

7 "Creating Vouchers for Loyalty Members" on page 68

8 "Defining Vouchers as Tier Rewards" on page 68

9 "Configurations for Loyalty Vouchers" on page 69

10 "Defining Loyalty Features of Products, Price Lists, and Catalogs" on page 70

11 "Creating Base Loyalty Promotions" on page 72

Creating Loyalty Programs

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

This task is a step in "Process of Setting Up Loyalty Programs" on page 56.

To create a loyalty program

1   Navigate to the Loyalty Program Administration screen.

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

Field	Comments
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, select the brand owner company. If the program is outsourced to a partner company, select the name of partner. If programs are implemented by business units of the brand owner company, you can create an account for each business unit and select the appropriate one. 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.
Promotion Calculation Rule	Select the method used to calculate points when multiple promotions are in effect. For more information, see "About Promotion Calculation Rules for Loyalty Programs" on page 53.
Start Date	Enter the date and time when the program goes into effect.
End Date	Enter the date and time when the program is no longer in effect. If this field is blank, the program remains in effect indefinitely.

Defining Program Level Attributes for Loyalty

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" on page 137.

This task is a step in "Process of Setting Up Loyalty Programs" on page 56.

Defining Point Types for Loyalty Programs

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

This task is a step in "Process of Setting Up Loyalty Programs" on page 56.

Each point type can have both:

■ **Qualifying Points.** Count toward a member's tier status.

■ **Non-qualifying Points.** Do not count toward tier status.

Both qualifying and non-qualifying points can be used for redemptions.

Many loyalty programs have only one point type. These are the points that a member earns for accruals (both qualifying and nonqualifying), and then uses 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 should 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 should have two point types: one to track the number of points, the other to track the number of flight segments.

Other programs may use loyalty point types to link specific actions more tightly with specific rewards. For example, a loyalty program targeted at partners, in addition to having standard points, could also create points such as:

■ **Training Points.** Attending conferences earns a member training points, which can then be redeemed for free training courses. Only Training Points, not Regular Points, can be used to purchase training courses.

■ **Marketing Points.** Paying for advertisements that help promote the brand owner's products may earn marketing points, which can be used to earn a spot on the advertisements the brand owner pays for.

If a loyalty program tracks some member action, you should create a specific point type for that action. For example, if an airline gives rewards based on the number of frequent flyer points that customers earn and also based on the number of flights that customers take, you should create two point types, one to track the number of frequent flyer points and one to track the number of flights.

To define point types

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 Point Types view tab.

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

Field	Comments
Name	Enter a name for the point type.
Active	Select this check box to make this point type available to the program.
Field to Use	Select the field in the Members screen that will be used to display the number of points a member has of this point type. Options are Point 1, Point 2, Point 3, and Point 4. There can be other options if you configure the product as described in "Creating Point Types for Loyalty Programs" on page 16.
Qualifying Weight	Enter a weight that will be used to calculate which promotion will apply if multiple promotions are available. For more information, see "About Promotion Calculation Rules for Loyalty Programs" on page 53.
Non-Qualifying Weight	Enter a weight that will be used to calculate which promotion will apply if multiple promotions are available. For more information, see "About Promotion Calculation Rules for Loyalty Programs" on page 53.

Minting Point Blocks for Loyalty Programs

A point block is a set of points assigned to the host company or a partner. Whenever a member accrues points, those points come from a point block associated with that host company or partner.

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

This task is a step in "Process of Setting Up Loyalty Programs" on page 56.

Each point block is created for use by the host company or by a partner company. Partner companies buy points, as described in "Selling Loyalty Points to Partners" on page 240.

Each point block applies to only one point type. Thus, if you have more than one point type, you need a point block per point type per partner if actions with that partner can create an accrual transaction that gives points of the selected point type. Thus, if a partner is a redemption only partner (points can be used to purchase items from this partner, but a member cannot earn points by buying a normal item with currency from this partner), then a point block is not necessary.

Creating Point Blocks

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

To create point blocks

1 Navigate to the Loyalty Program Administration screen.

2 In the Programs list, select the program that uses the points and click its Program Id hyperlink.

3 Click the Point Blocks view tab.

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

Field	Comments
Status	When you are finished filling out the record, select Submitted to submit the new point block for approval.
Partner/Host	Select the company that will use these points, which may 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.
Point Type	Select the point type. For more information about point types, see "Creating Point Types for Loyalty Programs" on page 16.
Original # 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 "Selling Loyalty Points to Partners" on page 240.

Approving Point Blocks

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

To approve point blocks

1 Navigate to the 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 should check periodically to see which blocks have few points remaining, so they can create new point blocks as replacements.

To check the points remaining in blocks

1   Navigate to the 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.

Defining Tier Classes and Tiers

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

■   **Tier Classes.** Multiple tier classes are used if you have different tiers for different types of members. For example, an airline frequent flyer program may have different tiers for members flying business class and first class. Then the airline would define two tier classes, and it would define a set of tiers for each tier class.

■   **Tiers.** In most loyalty programs, members earn the right to be in certain tiers, such as Gold Member or Platinum Member, based on how much they purchase. Members get rewards for being in higher tiers, so tiers are an important incentive in loyalty programs.

You must define at least one tier 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 left unchecked.

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

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

This task is a step in "Process of Setting Up Loyalty Programs" on page 56.

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

A tier also defines if and when points expire. Tier expiration rules are the default. If a promotion's action is to assign points, 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.

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

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

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

Field	Comments
Restart Qual Period	Select when the length of time for the new qualifying period starts after a tier status change. For example, if a member changes from the Silver tier to the Gold tier, this field specifies when the length of time will start to qualify for the Platinum tier.
	The options are:
	■ **Qualifying Period Expiration.** The length of time for the new qualifying period starts at the expiration of the current qualifying period. For example, the qualifying period for a member to qualify for the Gold tier ended on December 31, 2003, the member actually qualified for the Gold tier on August 17, 2003, and the length of time to qualify for Platinum tier is one year. Then the member has from August 17, 2003 until December 31, 2004 to qualify for the Platinum tier.
	■ **Tier Status Change.** The length of time for the new qualifying period starts immediately when the tier changes. For example, if a member changes from Silver tier to Gold tier on August 17, 2003, and if the length of time to qualify for the Platinum tier is one year, the member will have from August 17, 2003 until August 17, 2004 to qualify for the Platinum tier.
	NOTE: Do not choose Tier Status Change if you choose Jan. 1 or First Day of Month in the Start Qualifying Period field. These two combinations do not make sense logically. Choose Tier Status Change only if you choose Enrollment Date in the Start Qualifying Period field.

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

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

Field	Comments
Requal Period Length and Requal Period UoM	Enter the length and unit of measurement for the qualifying period for existing members to remain in this tier. Usually, this is the same as the initial qualifying period. For example, if a member must earn 10,000 points in a year to initially qualify for the Platinum tier, the member must continue to earn 10,000 points per year to remain in the Platinum tier.
Expire Extension in Days	Enter the extension in days before points expire. Typical extensions are 30, 60, 365.
	For example, if you enter 365, 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, the Loyalty Engine expires all accrued points.
	If you do not want to use this feature, enter a value of 0 for each tier. Do not leave the field blank (null). Entering 0 will make 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, the length = 2 and UoM = Year. After points expire, the member can no longer exchange them for rewards.
	If points should never expire, 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 non-qualifying points expire for members of this tier.
	If points should never expire, 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" on page 232.
	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*.

Field	Comments
Only If Activity	If this check box is selected, a statement will only be sent if an accrual or redemption activity has occurred since the last one was sent.
Show Flag	Select this check box to display the tier on the Web site. **NOTE:** To display this field, right click on the list and use the Columns Displayed feature.
Expire Points	Clear this check box if points should never expire for members of this tier. This overrides the specifications in the fields that indicate when points expire. **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 right 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 will be demoted to if they fail to earn enough points to requalify for this tier during the requalifying period. If no value is selected here, members will be demoted to the tier that they qualify for based on the number of points they earned during the requalifying period. **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, 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. **NOTE:** To display this field, right click on the list and use the Columns Displayed feature.

6 To enter notes about the tiers in this tier class, click the Tier Notes view tab, add a new record to the Tier Notes list, and complete the necessary fields.

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

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 should have a general understanding of how to create promotions, described in Chapter 5, "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.

   NOTE: Do not delete the tier promotion record that is created automatically.

■ **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" on page 136.

   ■ **The rule criteria.** When you create the rule, create the criteria as follows:

      ❏ If you select Is Automatic as the first criteria, this is an automatic tier change. The tier will change whenever the member meets the rest of the criteria.

      ❏ If you do not select Is Automatic as the first criteria, this is a manual tier change. The tier will change 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 if the user has the appropriate number of points to qualify for this tier or to be upgraded or downgraded.

   ■ **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, specify the tier to upgrade or downgrade to.

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

■ **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 does not apply to tier promotions, because they do not give points as rewards. The Tier view specifies which tiers the promotion applies to, and this information does not apply to tier promotions, because the tier was already specified when the promotion was created.

For a detailed example of how to create the tier promotions needed by a sample loyalty program, see "Example of Creating Tier Promotions" on page 88.

NOTE: You cannot delete tier promotions. If you were able to delete a tier promotion, you would also have to delete the tier and all references to it and recreate it from scratch. Even one stale reference could stop the engine.

Creating Vouchers for Loyalty Members

You must create vouchers:

■ If member service representatives give vouchers to members, such as to compensate them for missed flights.

■ If you are setting up a loyalty program that gives members vouchers as rewards when they enter a new tier.

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

For more information about vouchers, see "Giving Vouchers to Loyalty Members" on page 220.

This task is a step in "Process of Setting Up Loyalty Programs" on page 56.

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

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

Defining Vouchers as Tier Rewards

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

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

This task is a step in "Process of Setting Up Loyalty Programs" on page 56.

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

To associate vouchers with tiers

1 Navigate to the Loyalty Program Administration screen.

2 In the Loyalty Programs list, select the program that 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.

Configurations for 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 change configure the product so the UOM also includes days. This allows 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:

Add a new LOV type called Days.

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 a member a voucher(s) when they register, then add as a step to the Registration Action-Base Bonus workflow to create a voucher record for the member.

Defining Loyalty Features of Products, Price Lists, and Catalogs

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

Any item that can give a member points or that a member can use points to purchase must be entered as a product.

This applies to items not normally thought of as products, such as action-based bonuses. For example, since a member receives points for enrolling in the program, a product is created that will be associated with this accrual transaction. For more information, see "Example of Creating an Action-Based Bonus" on page 182.

If a member can purchase points with currency, then products must to be created to enable this. 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 must have a base price defined in a price list. They can also have discounts, defined in Siebel Pricer. For information about defining airport codes, see "Defining Loyalty Airport Codes" on page 42.

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

These fields control:

■ How many points a member earns for purchasing a product.

■ How many points are required to redeem a product.

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

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

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

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

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

This task is a step in "Process of Setting Up Loyalty Programs" on page 56.

Defining Loyalty Features of Products

After airline companies have defined airport codes, they define each of their flights as a product by selecting the From Airport and the To Airport for that flight.

To define loyalty features of products

1   Navigate to the Administration - Product screen.

2   Add a new record to the Products list, and complete the necessary fields.

3   On the More Info view tab's link bar, click the More Info link on the far left.

4   In the expanded main form for the product, complete the necessary fields, which are described in the following table.

Field	Comments
From Airport To Airport	Airline companies use these two fields to define every possible Airport Code pair as a separate product.
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.
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.

5   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.

6   Create product catalogs, as described in *Siebel eSales Administration Guide*.

Creating Base Loyalty Promotions

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

■ Adding points to members' balances when they perform accrual transactions.

■ Subtracting points from members' balances when they perform redemption transactions.

■ Updating vouchers when members perform transactions that use vouchers.

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

You must create a transaction attribute, to be used by the base promotion that processes cancellations. Then you must create the following promotions for each program:

■ Admin - Accruals

■ Admin - Cancellation

■ Admin - Gift

■ Admin - Loan

■ Admin - Point Transfer

■ Admin - Redemptions

■ Admin - Voucher

This task is a step in "Process of Setting Up Loyalty Programs" on page 56.

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

To create the Transfer Member Id transaction attribute

1 Navigate to Administration - Data > 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 base 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 table that follows.

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.

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

3 Click the Promotion # field's hyperlink.

4 Click the Rules view tab.

5 Create the rule for this promotion:

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

Field	Value
Sequence	1
Name	Check Points
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 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, and enter the values in the following table.

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

To create the Admin - Cancellation 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 - Cancellation
Always Apply	Y
Apply To	Cancellation
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 base promotion to expire.>

3 Click the Promotion # 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, and enter 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, and enter the values in the following table.

Field	Comments
Sequence	1
Name	Invoke Cancel
Type	Cancel Transaction

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

Field	Comments
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	Comments
Sequence	3
Name	RTC Manual
Type	RTC Manual

To create the Admin - Gift base 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, the system also copies its associated Rule. In the Rule copy, leave all values the same.

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

3   Click the Promotion # field'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, and enter 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, and enter 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

Field	Value
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, and enter the values in the following table.

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

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

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

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

Field	Value
Sequence	2
Name	Loan Repayment
Rule Applies To	Transactions

c   Click the 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	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, and enter the values in the following table.

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

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

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

To create the Admin - Point Transfer 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 - Point Transfer
Always Apply	Y
Apply To	Point Transfer

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

3 Click the Promotion # field'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	Point Transfer
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 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 (zero) 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 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, and enter the values in the following table.

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

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

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

6   Create the second rule for this promotion:

a   In the threadbar, click Promotion: Admin - Point Transfer.

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

Field	Value
Sequence	1
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, and enter 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, and enter 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

To create the Admin - Redemptions 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 - Redemption
Always Apply	Y
Apply To	Redemption-Product
Program	<Enter the name of the program.>
Partner	<Enter the partners for the program.>
Product Inclusion	All Product
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 base promotion to expire.>

3 Click the Promotion # 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, and enter 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, and enter 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
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, and enter the values in the following table.

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

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

3 Click the Promotion # field'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	Debit Voucher
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	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, and enter 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 threadbar, click Promotion: Admin - Voucher.

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

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

c Click the 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	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, and enter the values in the following table.

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

To activate the base 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

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" on page 56.

4 When you have made all needed changes, select the Active check box to activate the program again.

5 Click Update Cache.

Example of Creating Tier Promotions

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

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

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

This example assumes that you have already set up a loyalty program with appropriate tiers.

When you created these tiers, the application automatically created the tier promotion record for them. For more information about creating tiers, see "Defining Tier Classes and Tiers" on page 61.

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, 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" on page 89

■ "Creating a Rule for the Base Tier for One Type of Point" on page 90

■ "Creating a Rule for the Base Tier for the Second Type of Point" on page 92

■ "Creating Additional Rules for the Base Tiers" on page 94

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 # 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 K Points & Not Expired - Upgrade to Platinum
Apply To	Tiers

4 Click the Rule Name.

5 To create the first criteria, 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 criteria means that the rule applies if the member has over 250,000 regular points.

Field	Value
Sequence	1
Name	>= 250 K Regular Points
Type of Comparison	Compare to Values
Expression	[Member Tier.Field.Point 1 Value]>=250000 (This information in this field is automatically generated by entries in the following fields in the Compare To Values Detail and Values forms)
Object	Member Tier
Attribute	Regular Points
Condition	Is Greater Than or Equal To
Value	250000

6 To create the second criteria, 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 second criteria means that the rule applies only if the tier is changed automatically, not if it must be changed manually.

Field	Value
Sequence	2
Name	Is Automatic
Type of Comparison	Compare to Values
Expression	[Member Tier.Field.Tier Approval Status]<>Pending (Generated by the following selections in the Compare To Values Detail and Values forms)
Object	Member Tier
Attribute	Tier Approval Status
Condition	Does Not Equal
Value	Pending

7 To create the third criteria, 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	Not Expired
Type of Comparison	Compare to Values
Expression	[Member Tier.Field.Expired Flag]="N" (Generated by the following selections in the Compare To Values Detail and Values forms)
Object	Member Tier
Attribute	Is Expired
Condition	Equals
Value	N

NOTE: This third criteria means that the rule applies only if the points have not expired.

8 To enter the action for this rule, click the Actions view tab.

9 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 we 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 criteria, 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	>= 60 Tier Qualification Points
Type of Comparison	Compare to Values
Expression	[Member Tier.Field.Point 3 Value]>=60
	(Generated by the following selections in the Compare To Values Detail and Values forms)
Object	Member Tier
Attribute	Tier Qualification Points
Condition	Is Greater Than or Equal To
Value	60

NOTE: This first criteria means that the rule applies if the member has over 250,000 regular points.

5 To create the second criteria, 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 is the same as the second criteria for the previous rule.

Field	Value
Sequence	2
Name	Is Automatic
Type of Comparison	Compare to Values
Expression	[Member Tier.Field.Tier Approval Status]<>Pending
	(Generated by the following selections in the Compare To Values Detail and Values forms)
Object	Member Tier
Attribute	Tier Approval Status
Condition	Does Not Equal
Value	Pending

NOTE: This second criteria means that the rule applies only if the tier is changed automatically, not if it must be changed manually.

6 To create the third criteria, 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 is the same as the third criteria for the previous rule.

Field	Value
Sequence	3
Name	Not Expired
Type of Comparison	Compare to Values
Expression	[Member Tier.Field.Expired Flag]="N" (Generated by the following selections in the Compare To Values Detail and Values forms)
Object	Member Tier
Attribute	Is Expired
Condition	Equals
Value	N

NOTE: This third criteria means that the rule applies only if the points have not 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. This 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 250K Points & Not Expired - Upgrade to Platinum

2 60 flight segments - Upgrade to Platinum

3 120k Points & Not Expired - Upgrade to Gold

4 40 flight segments - Upgrade to Gold

5 60k 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, see the Loyalty demonstration application.

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 should 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 is the start date of the previous qualifying period.

■ **TC1 Current QP Start.** For tier class 1, this is the start date of the current qualifying period.

■ **TC1 Current QP End.** For tier class 1, this 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 will apply 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
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 will apply 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
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 the system, the age of the transaction and determines whether or not any retroactive tier action should be taken.

To create retroactive tier transaction attributes

1 Navigate to the Loyalty Program Administration screen.

2 Locate the program that the attribute will apply 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	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	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 criteria for Tier qualification):

1 Manual Tier Approval

2 Retro Tier Automatic Activation

3 250K Points > Upgrade Platinum Retro

4 250 K Points & Not Expired - Upgrade to Platinum

5 120K Points > Upgrade Gold Retro

6 120 K Points & Not Expired - Upgrade to Gold

7 60K Points > Upgrade Silver Retro

8 60 K 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 procedure below.

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 criteria, 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
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 criteria, 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 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 will vary depending on your configuration.

Field	Value
Sequence	3
Name	250K points - Upgrade Platinum Retro
Apply to	Tiers

b Click the Rule Name.

c To create the first criteria, 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	>= 250K Regular Points
Type of Comparison	Compare to Values
Expression	[Member Tier.Field.Point 1 Value] > = 250000 **NOTE:** This field is automatically populated based on the values entered into fields in the Compare To Values Detail and Values forms.
Object	Member Tier
Attribute	Regular Points
Condition	Is Greater Than or Equal To
Value	250000

d To create the second criteria, 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
Expression	[Member Tier.Field.Tier Approval Status] = 'Retro Tier Pending' OR [member.Tier.Field.Tier Approval Status] = 'Retro Tier Automatic'
Object	Member Tier
Attribute	Tier Approval Status
Condition	Equals
Value	Pending - RTC
Value	RTCINT - Automatic

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 criteria, 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
Expression	[Member Tier.Field.Expired Flag] = 'Y'
Object	Member Tier
Attribute	Is Expired
Condition	Equals
Value	Y

d To create the second criteria, 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
Expression	[Member Tier.Field.Transaction Sub Type LIC] = 'Cancellation'
Object	Member Tier
Attribute	Transaction Sub Type LIC
Condition	Equals
Value	Cancellation

e To create the third criteria, 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
Expression	[Member Tier.Field.Tier Approval Status] = 'Retro Tier Pending' OR [Member Tier.Field.Tier Approval Status] = 'Retro Tier Automatic'
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

Field	Value
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 criteria, 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
Expression	[Member Tier.Field.Expired Flag] = 'Y'
Object	Member Tier
Attribute	Is Expired
Condition	Equals
Value	Y

    d To create the second criteria, 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

Field	Value
Expression	[Member Tier.Field.Tier Approval Status] = 'Automatic' OR [Member Tier.Field.Tier Approval Status] = 'Manual - Approved' OR [Member Tier.Field.Tier Approval Status] = 'RTC - Manual - Approved'
Object	Member Tier
Attribute	Tier Approval Status
Condition	Equals
Value	Automatic
Value	Manual - Approved
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, 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 may vary. If you decide you do no want to use retroactive tier logic, 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.>
Partner	<Enter the partners for the program.>
Product Inclusion	All Product
Promotion Start	<Enter one day before today's date.>
Promotion End	<Leave this field blank, because you do not want the base promotion to expire.>

3 Click the Promotion # field'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
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
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
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

Field	Value
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
Compare this object	Attribute	TC2 Current QP End

Section	Field	Value
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
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

Field	Value
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	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
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
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
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	TC2 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	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
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

Field	Value
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
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

Section	Field	Value
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?
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
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

Section	Field	Value
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
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
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

Field	Value
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
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
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.

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.

5 Setting Up Siebel Loyalty Promotions

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

- *"Types of Loyalty Promotions" on page 135*
- *"About Creating Loyalty Promotions" on page 136*
- *"Process of Creating Loyalty Promotions" on page 137*
- *"About Adding Marketing Information to Loyalty Promotions" on page 154*
- *"Process of Approving Loyalty Promotions" on page 159*
- *"About Controlling the Availability of Loyalty Promotions" on page 161*
- *"Allowing Existing Fields to Be Used in Loyalty Promotion Criteria" on page 163*
- *"Allowing New Fields to Be Used in Loyalty Promotion Criteria" on page 164*
- *"Configuration Instructions for Common Promotions" on page 165*
- *"Loyalty Promotion Examples" on page 168*
- *"Troubleshooting Action-Based Bonuses" on page 199*

Types of Loyalty Promotions

There are three basic types of loyalty promotions:

- **Base Promotions.** Base promotions must be defined when you create a loyalty program, in order to perform basic processing, such as accruing and redeeming points. These promotions are only identified by their names, and they should not be exposed to members. Because you must create base promotions whenever you create a loyalty program, they are covered in the chapter about setting up programs, in *"Creating Base Loyalty Promotions" on page 72*.

- **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 base promotions whenever you create a loyalty program, they are covered in the chapter about setting up programs, in *"Creating Tier Promotions" on page 67*.

- **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. For an overview of how to create reward promotions, see *"About Creating Loyalty Promotions" on page 136*.

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

- **Simple Promotions.** These promotions reward members for a single purchase. For example, if they fly from SFO to BOS in August 2003, they will earn 1000 bonus points if they are a Platinum member or 500 bonus points if they are not a Platinum member.

■ **Frequency Promotions.** These promotions reward members for multiple purchases of the same type. For example, if they fly from SFO to BOS in August 2003 3 times, they will earn 3000 bonus points, if they fly 4 or 5 times, they will earn 4000 bonus points, or if they fly more than 5 times, they will earn 5000 bonus points.

■ **Complex Promotions.** These promotions reward members for multiple purchases of different types. These are often run with partners to encourage members to buy both the company's and the partner's products. For example, if members stay at a specific hotel and rent a car from a specific car rental company, they will get 5000 bonus points.

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

■ **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.

■ **Joint Promotions.** These promotions reward members for their activities with two or more companies. The activity could be with the host and partner or with multiple partners. For example, an airline runs a promotion giving bonuses if you complete three flights and stay five nights in a partner hotel.

■ **Roundtrip.** These promotions reward members for completing a round-trip flight.

All of these types of promotions can all be created using the same framework of rules, criteria, and actions. For examples of how to create several types of promotions, see "Loyalty Promotion Examples" on page 168.

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.

■ **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, 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, the actions are the *then* portion.

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

■ **Products.** When you create the Promotion record, you can specify that the promotion only applies to purchases of specific products or applies to all except specific products. If you do this, you must use the Products view of the Promotion screen to specify which products are included in or excluded from the promotion.

■ **Point Blocks.** When you create the Promotion Record, you can limit the number of points that can be distributed through the promotion, by specifying that the promotion can only use point blocks that you create specifically for it. Then you must use the Point Blocks view of the Promotion screen to create the point blocks that the promotion uses. If you do not do this, the promotion uses any appropriate point blocks of its program.

■ **Tier.** You can specify that the promotion applies only to certain tiers by adding these tiers in the Tiers view. For example, if you only add the Platinum tier in this view, the promotion will only give rewards to Platinum members, and only Platinum members will be able to see this promotion in eLoyalty.

For step-by-step examples of how to create rules for different types of loyalty promotions, see "Loyalty Promotion Examples" on page 168.

Process of Creating Loyalty Promotions

For a general overview of how to create reward promotions, see "About Creating Loyalty Promotions" on page 136.

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

To create loyalty promotions, perform the following tasks:

1 "Creating Attributes for Loyalty" on page 137

2 "Creating a Loyalty Promotion Record" on page 142

3 "Specifying Products Included in a Loyalty Promotion" on page 143

4 "Providing Point Blocks for Loyalty Promotions" on page 144

5 "Creating Rules for Loyalty Promotions" on page 146

6 "Creating Criteria for Loyalty Promotion Rules" on page 147

7 "Creating Actions for Loyalty Promotion Rules" on page 150

8 "Specifying the Tiers Applicable to Loyalty Promotions" on page 154

Creating Attributes for Loyalty

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

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

All the types of attributes are summarized in Table 12.

Table 12.   Types of Attributes

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

This task is a step in "Process of Creating Loyalty Promotions" on page 137.

Creating Member Attributes

Member attributes are dynamic values that you create to track actions over the life time of a member. Their value 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" on page 137.

To create member attributes

1   Navigate to the Loyalty Program Administration screen.

2   Locate the program that the attribute will apply 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	Comments
Data Type	Based on what type of data is being tracked, select Date, Integer, Number, or String. If the values will be free form text (such as Yes and No) 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" on page 227.
Pick List	Select this check box if the attribute is a field whose values are entered using a picklist. Then, when you are defining criteria and actions, the application will display the picklist with the values for this field.
Pick Applet	Select this check box if the attribute is a field whose values are entered using a dialog box. Then, when you are defining criteria and actions, the application will display the dialog box with the values for this field.
Pick Field	The pick field is that field whose value the user sees in the UI after selecting from the pick applet.

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 will apply 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	Comments
Pick Field	Select the field that the attribute represents. **NOTE:** To make additional fields available in this field, see "Changing the Fields Used in Loyalty Attributes" on page 19.
Merge Action	Specify how the program handles this attribute when you do a member merge. For more information, see "Merging Loyalty Program Members" on page 227.

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 will get one hundred bonus points.

To create point totals attributes

1 Navigate to the Loyalty Program Administration screen.

2 Locate the program that the attribute will apply 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	Comments
Point Type	Select the point type.
Total Over # of Months	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 will apply to and click the hyperlink in its Promotion # field.

3 If the promotion form's Active check box is selected, 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	Comments
Active	Select this check box to make the attribute available for use in criteria and actions.
Field	Select the field that the attribute represents. For information about specifying which fields are available, see "Changing the Fields Used in Loyalty Attributes" on page 19.
Default	Enter a default value that will be used when the attribute is created for a member for the first time.
Data Type	Select the data type of the attribute. If you selected a field, its data type is displayed automatically.
Pick List	Select this check box if the attribute is a field whose values are entered using a picklist. Then, when you are defining criteria and actions, the application will display the picklist with the values for this field.
Pick Applet	Select this check box if the attribute is a field whose values are entered using a dialog box. Then, when you are defining criteria and actions, the application will display the dialog box with the values for this field.
Pick Field	The pick field is that field whose value the user sees in the UI after selecting from the pick applet.

Displaying Promotion-Specific Attributes to Members

If you want to display a promotion's promotion-specific attributes to members on the member portal, 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 at bottom for promotion attributes.

If a Member has enrolled in the promotion and has at least one qualifying transaction for the promotion, 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 # 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 a Loyalty Promotion Record

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

This task is a step in "Process of Creating Loyalty Promotions" on page 137.

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	Comments
Apply To	Select which type of transaction the promotion applies to. The options are Accrual-Product, Loan, Redemption-Product, Cancellation, Accrual-Gift, Bonus, and Voucher. If you leave this field blank, the promotion can apply to all types of transactions.
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.

Field	Comments
Always Apply	Select this check box to make this promotion always apply, regardless of the choice you made in the Promotion Calculation Rule for the loyalty program that this promotion is part of. For more information, see "About Promotion Calculation Rules for Loyalty Programs" on page 53.
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, all members of the program receive the reward for this promotion without enrolling in it.
Promotion Start and Promotion End	Enter the date when the promotion starts and ends. Products purchased between these dates qualify for the promotion reward.
Enrollment Start and Enrollment End	If this promotion requires enrollment, enter the dates when members can enroll. In general, these dates should 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. ■ **Include Products.** Applies only to products listed in the Products view of the Loyalty Promotion Administration screen. ■ **Exclude Products.** Applies only to products not listed in the Products view of the Loyalty Promotion Administration screen.
Point Limit Type	Select Limited if the points awarded will be taken from a point block created specifically for this promotion. Select Unlimited if the points will be taken directly from the company's or partner's point blocks, without limit. For more information, see "Providing Point Blocks for Loyalty Promotions" on page 144.
Partner	Select the company that the promotion is hosted by. This is the company whose 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.

Specifying Products Included in a Loyalty Promotion

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

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

■ **All Products.** The promotion applies to all accrual products.

■ **Include Products.** The promotion applies only to products listed in the Products view of the Promotion Administration screen.

■ **Exclude Products.** The promotion applies only to products not listed in the Products view of the Promotion Administration screen.

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

This task is a step in .

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 # field.

3   If the promotion form's Active check box is selected, 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, you select Unlimited in the Point Limit Type field of the Promotion record, so points will taken from the point blocks of the host company or the partner who owns the promotion. Then you must check to make sure that there are enough points to support the promotion.

■ **Create point blocks specifically for a promotion.** If you want to limit the number of point blocks that a promotion can distribute, you select Limited in the Point Limit Type field of the Promotion record, so points will only be taken from point blocks created specifically for the promotion. Then you must create the point blocks for the promotion.

This task is a step in . 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, points for the promotion are taken from the company or the partner who owns the promotion. You should check to make sure that enough points exist to support the promotion.

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

■ **Program.** Must be the same as the promotion's program.

■ **Point Type.** Must be the same as the point type being assigned.

■ **Status.** Must be Approved.

■ **Start Date.** Must be less than or equal to today (or NULL).

■ **End Date.** Must be greater than or equal to today (or NULL).

■ **Partner.** Must be the same as the transaction's partner. If the transaction's partner is NULL, then must be the same as the promotion's partner.

■ **Points Remaining.** Must be greater than the amount of points being assigned.

To check point blocks available for a promotion

1   Navigate to the Loyalty Program Administration screen.

2   In the Loyalty Programs list, select the program that the promotion is part of and click the hyperlink in its Program Id field.

3   Clear the program form's Active check box.

4   Click the Point Blocks view tab.

5   Check how many points are available in point blocks that have the appropriate values in the fields listed earlier.

6   If not enough points are available, create more points, as described in "Minting Point Blocks for Loyalty Programs" on page 59.

Creating Point Blocks for a Loyalty Promotion

If you selected Limited in the Point Limit Type field of the Promotion record, you must you must associate a point block with the promotion, and this point block will be used to give points for this promotion.

A sub point block is created and associated with the promotion. The sub point block will take a specified number of points from a point block that has been created and activated in the Program Administration > Point Blocks field.

For more information about fields in the Point Block record, see "Minting Point Blocks for Loyalty Programs" on page 59.

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

To create a point block for a loyalty promotion

1 Navigate to the Loyalty Promotions Administration screen.

2 In the Promotions list, select the promotion that you want to create a point block for and click the hyperlink in its Promotion # field.

3 If the promotion form's Active check box is selected, 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	Comments
Name	Enter the name for the sub point-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" on page 137.

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 per 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, 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, Loyalty executes the actions for that rule.

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 # field.

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

Creating Criteria for Loyalty Promotion Rules

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

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

There are the following types of criteria:

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

■ **Compare to Object.** Compares the value of one attribute with another attribute.

■ **Evaluate Roundtrip.** Checks whether a flight transaction is a part of a roundtrip.

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

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

This task is a step in .

Creating Criteria That Compare Attributes to Values

This type of criterion lets you compare an attribute to a value. For example, you can see if the value in a specific field is greater than 1000. If it is, the 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 # field.

3 If the promotion form's Active check box is selected, 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	Comments
Sequence #	Displays the sequence in which criteria are evaluated. To optimize performance, you can change the sequence so the criteria that eliminate most records are evaluated first, leaving fewer records for the remaining criteria to read through. (The sequence does not affect whether the rule qualifies, because all criteria must be true for the rule to qualify.)
Type of Comparison	Select Compare to Values
Object	Select the Object whose attribute will be compared. The picklist displays only those objects that are appropriate to the value in the Rule Applies To field (Transactions, Attributes, Tiers). The complete list of objects includes Member, Promotion, Transaction, and Member Tier. 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 will show comparison operators such as Equals, Does Not Equals, Is Greater Than, Is Empty, Starts With.

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

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

Creating Criteria That Compare Attributes to Attributes

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

To create criteria that compare an attribute to another attribute

1 Navigate to the Loyalty Promotions Administration screen.

2 In the Promotions list, find the promotion for which you want to create criteria and click the hyperlink in its Promotion # field.

3 If the promotion form's Active check box is selected, 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	Comments
	Sequence #	Displays the sequence in which criteria are evaluated. To optimize performance, you can change the sequence so the criteria that eliminate most records are evaluated first, leaving fewer records for the remaining criteria to read through. (The sequence does not affect whether the rule qualifies, because all criteria must be true for the rule to qualify.)
	Type of Comparison	Select Compare to Object
Compare this object	Object	Select the Object whose attribute will be compared.
Compare this object	Attribute	Select the attribute to be compared.
To this object	Other Object	Select the Object whose attribute the first attribute will be compared with.
To this object	Other Attribute	Select the attribute that the first attribute will be compared with.
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 do this, select an operator (such as *) and a value (such as 2) for the calculation.

Creating Criteria that Evaluate Roundtrips

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

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

To create criteria that evaluate roundtrips

1 Navigate to the Loyalty Promotions Administration screen.

2 In the Promotions list, find the promotion for which you want to create criteria and click the hyperlink in its Promotion # field.

3 If the promotion form's Active check box is selected, 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	Comments
	Sequence #	Displays the sequence in which criteria are evaluated. To optimize performance, you can change the sequence so the criteria that eliminate most records are evaluated first, leaving fewer records for the remaining criteria to read through. (The sequence does not affect whether the rule qualifies, because all criteria must be true for the rule to qualify.)
	Type of Comparison	Select Evaluate Roundtrip.
Compare Transaction Roundtrip Info	Object	Displays Transaction. This field is read-only, because the Evaluate Roundtrip comparison must be based on transactions.
Compare Transaction Roundtrip Info	Attribute	Enter the transaction attribute that has the roundtrip information.
To Recorded Roundtrip Info	Object	Enter the object in which the engine should store the information about the segments of the roundtrip that have already been completed.
To Recorded Roundtrip Info	Attribute	Enter the attribute on the object that stores information about completed segments information which has this information in an engine readable format.

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, the application executes the actions for that rule.

The following actions are used in promotions:

■ **Assign Points.** Gives points to the member.

■ **Update Attribute.** Changes the value of an attribute.

■ **Invoke Custom Action.** Invokes a method that you create to perform custom actions.

■ **Update Roundtrip Info.** Updates information about the segments of a roundtrip that have been completed. This is only used when you create a criteria of the type Evaluate Roundtrip.

■ **Redeem Points.** Redeems the member's points.

■ **Cancel Transaction.** Cancels a transaction.

This task is a step in "Process of Creating Loyalty Promotions" on page 137.

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 # field.

3 If the promotion form's Active check box is selected, 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	Comments
Use from Transaction	If you select this check box, the promotion uses the same point type and qualifying/nonqualifying value as the transaction. The Point Type and Qualifying fields become read-only. You can only select this check box for rules that apply to transactions.
Point Type	Select the point type to assign.
Qualifying	Select or clear this check box to make the points qualifying or non-qualifying.

Field	Comments
Object, Attribute, Operator, Value	Use these fields to build the expression that specifies how many points the member receives: ■ Use Object and Attribute to specify the attribute that the number of points is based on. For example, you can specify Transaction.Points to give a bonus equally to the number of base points. ■ Use Operator and Value with Object and Attribute to base the points on a calculation. For example, you can specify Transaction.Points * 0.2 to give a bonus equal to 20% of the base points. ■ Use Value alone to give a constant bonus. For example, you can enter 500 as the Value and leave the other three fields blank to give a bonus of 500 points.
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. If you do not specify an expiration here, the points that are given as a result of this promotion expire based upon the tier or product expiration rules.
Expiration Snap To	Optionally, specify that the expiration will be the nearest month, year, and so on to the expiration date determined by Expiration Length and UoM.

To create an update attributes action

1 Navigate to the Loyalty Promotions Administration screen.

2 In the Promotions list, find the promotion for which you want to create an action and click the hyperlink in its Promotion # field.

3 If the promotion form's Active check box is selected, 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, complete the necessary fields, described in the following table.

Section	Field	Comments
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.

Section	Field	Comments
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 "To create an assign points action" on page 151.
And/Or this value	Operator, Value	

Using Invoke Custom Action

You can define your own custom actions for promotions. Supported custom actions include:

■ CancelTxnAttributes

■ SetLoanBalance

■ DebitVoucher

■ PointTransfer

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

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

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

Argument	Context Where It Is Specified
Member Id	Always
Transaction Id	Only for Rules that apply to transactions
Bucket Id	Only for rules that apply to attributes and for rules that apply to transactions that a promotion bucket has been created for
Promotion Id	Always
Promotion Rule Id	Always
Tier Id	Only for tier promotions

Using Redeem Points

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

■ The Expression section is used to calculate the number of points redeemed, not the number assigned.

■ You do not specify whether the points are qualifying or non-qualifying.

■ You do not specify when the points expire.

This type is used only in base promotions, not in promotions that are made visible to customers. For more information about base promotions, see "Creating Base Loyalty Promotions" on page 72.

Using Cancel Transactions

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

This type is used only in base promotions, not in promotions that are made visible to customers. For more information about base promotions, see "Creating Base Loyalty Promotions" on page 72.

Specifying the Tiers Applicable to Loyalty Promotions

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

For example, if a promotion applies only to Platinum members, add the Platinum tier to the Tiers list. If a transaction is processed that meets all of a rule's criteria, but the member is not part of the specified tier, the rule's actions will not be invoked. In addition, only Platinum members will be able to see this promotion on the eLoyalty Member Portal.

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

If a promotion requires enrollment, you must list the tiers here. Only members in these tiers will be able to enroll in the promotion.

This task is a step in "Process of Creating Loyalty Promotions" on page 137. 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 # field.

3 If the promotion form's Active check box is selected, click Modify.

4 Click the Tiers view tab.

5 Add one or more records to the Tiers list.

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" on page 155

■ "Creating Goals and Assumptions for Loyalty Promotions" on page 155

- "Adding Expenses and Line Items to Loyalty Promotions" on page 157

- "Adding Purchase Requests to Loyalty Promotions" on page 158

- "Adding Market Development Fund (MDF) Requests to Loyalty Promotions" on page 158

- "Associating Loyalty Members with Marketing Campaigns" on page 159

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 should 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 top of this form, which quickly shows the user the member's value.

- **Lifetime Value Score.** This field in the Member More Info form allows 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 > More Info view. Without configuration, these fields are read-only, since the assumption is that this non-Loyalty 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*.

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 # field.

3 If the promotion form's Active check box is selected, 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 Table 13.

Table 13.   Fields in the Goals and Assumptions Lists

Field	Comments
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

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 # field.

3 If the promotion form's Active check box is selected, 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 below the Goals list, and complete the necessary fields in each record. Some fields are described in Table 13 on page 156.

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.

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 # field.

3 If the promotion form's Active check box is selected, 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	Comments
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

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 # field.

3 If the promotion form's Active check box is selected, 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 below the Expenses list, and complete the necessary fields in each record. Some fields are described in the following table.

Field	Comments
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

Field	Comments
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

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 # field.

3   If the promotion form's Active check box is selected, 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, do the following:

    a   Click the hyperlink in the Purchase Request # field to display the purchase request in the Service Order form.

    b   Click the appropriate view tab below 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 (MDF) 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 # field.

3   If the promotion form's Active check box is selected, 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	Comments
Fund	MDF from which to draw the requested amount.
Partner	Partner that will receive 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 the system.

Associating Loyalty Members with Marketing Campaigns

To target loyalty 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 # 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.

Process of Approving Loyalty Promotions

Optionally, an employee can submit a promotion to a manager for approval before activating the promotion.

After administrators submit promotions to their managers for approval, managers can view and approve them, and administrators can display the audit trail for those approvals.

To process loyalty promotion approvals, perform the following tasks:

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. This allows them to avoid both overwhelming members with promotions, and neglecting to provide members with any promotions during some periods.

This task is a step in .

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.

   The system 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, 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 .

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, 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 selection from In Progress to Submitted.

   The system sends this promotion to the designated 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 .

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 selection 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" on page 159.

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 # 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.

About Controlling the Availability of 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: You should keep a promotion active as long it could apply 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, all promotions should remain active for six months after the promotion's end date.

■ "Activating Loyalty Promotions" on page 162

■ "Modifying Loyalty Promotions" on page 162

■ "Deactivating Loyalty Promotions" on page 163

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, 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 allows you to make changes to a promotion that is 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" on page 137.

5   Click Activate.

Deactivating Loyalty Promotions

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

After deactivating a promotion, you can reactivate it by following the instructions in "Activating Loyalty Promotions" on page 162.

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 Fields to Be Used in Loyalty Promotion Criteria

You can set up the application to allow you to use any field in the Member > More Info form in a criteria 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" on page 18, then you can also use the method in this section 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 if the field already exists in the LOY Engine business component.

   c If it is not already there, add the field to the LOY Engine business component.

2 In the Siebel application:

   a Navigate to Administration - Data > 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 New Fields to Be Used in Loyalty Promotion Criteria

If you configure the application to add a new field, for example to the Member or Transaction record, it is not automatically available for us in promotion criteria. This section describes how to add a new field that is available in promotion criteria.

To add a new field used in a transaction, do the following:

■ Decide what type of attribute you must use in the criteria. For more information about types of attributes, see "Creating Attributes for Loyalty" on page 137.

■ Using Siebel Tools, add the field that attribute will be based on to the appropriate business components, as shown in Table 14. For example, if you want to use a Transaction Attribute in the criteria, add the field to the business component LOY Transaction and LOY Engine Transaction.

Table 14.   Business Components and LOV Types Used with Attribute Types

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
Promotion Specific	LOY Promotion Bucket LOY Engine Promotion Bucket	LOY_ATTRIB_FIELDS_PROMO_BUCKET
Point Type	LOY Member/LOY Tier LOY Engine Member/LOY Engine Tier	LOY_ATTRIB_FIELDS_MEM_POINT

■ Using Siebel Loyalty, navigate to the Administration - Data > List of Values view and add the appropriate value:

■ In the Type field, query Query for the appropriate LOV type for this attribute, as shown in Table 14. For example, if you want to use a Transaction Attribute in the criteria, query for LOY_ATTRIB_FIELDS_TXN.

■ 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.

■ Click the Clear Cache button to refresh the cache.

■ Now you can create an attribute based on this new field, as described in
.

Configuration Instructions for Common Promotions

You can configure the product to create commonly used promotions in the following ways.

Creating a Promotion that Applies During a Specific Day of the Week

You can create a promotion that only applies on a specific day each week as follows:

In Siebel Tools, configure Loyalty as follows:

■ In the business component LOY Transaction, create a calculated field called *Day of Week*, which
calculates the day of the week from the Transaction date field.

■ In the business component LOY Engine Transaction, create the same calculated field.

In Siebel Loyalty:

■ In the List of Values Administration view, add a new record for LOY_ATTRIB_FIELDS_TXN with
the value *Day of Week*.

■ Create a transaction attribute based on this field.

■ Create a promotion with a rule that:

   ■ Includes a criteria that uses this transaction attribute. For example, the criteria might be Day
   of Week = Tuesday.

   ■ Includes an action that gives a bonus if the criteria for the promotion are true.

For general information about adding new fields that are used in promotion criteria, see
.

Creating a Promotion that Applies at a Specific Time of Day

You can create a promotion that applies at a specific time of day (such as applying only to transactions between 2 PM and 4 PM) as follows:

In Siebel Tools, configure Loyalty as follows:

■ In the business component LOY Transaction, create a calculated field called *Time of Day*, which calculates the time of day in the Transaction date field (which includes both date and time). Set the type of the new field as DTYPE_TIME

■ In the business component LOY Engine Transaction, create the same calculated field.

In Siebel Loyalty:

■ In the List of Values Administration view, add a new record for LOY_ATTRIB_FIELDS_TXN with the value *Time of Day*.

■ Create a transaction attribute based on this field.

■ Create a promotion with a rule that:

■ Includes a criteria that uses this transaction attribute. For example, the criteria might be Time of Day > 10:00:00 and Time of Day < 11:00:00.

■ Includes an action that gives a bonus if the criteria for the promotion are true.

For general information about adding new fields that are used in promotion criteria, see .

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.

In Siebel Tools, configure Loyalty as follows:

■ In the business component LOY Member, create a calculated field called *Join Date*, calculated using the function Left([Start Date],5).

■ In the business component LOY Engine Member, create the same calculated field.

■ In the business component LOY Transaction, create a calculated field called *System Date*, calculated using the function Left(Today(),5).

■ In the business component LOY Engine Transaction, create the same calculated field.

In Siebel Tools:

■ 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.

■ Set up a job (using Workflow Batch Process Manager) component to run this workflow.

In Siebel Loyalty:

■ In the List of Values Administration view, add a new record for LOY_ATTRIB_FIELDS_MEMBER with the value *Join Date*.

■ In the List of Values Administration view, add a new record for LOV LOY_ATTRIB_FIELDS_TXN with the value *System Date*.

■ Create a Member Attribute based on the field Join Date.

■ Create a Transaction Attribute based on the field System Date.

■ Create a promotion with a rule that:

   ■ Includes a criteria that compares the attribute for the Join Date and the attribute for the System Date.

   ■ Includes an action that gives a bonus if this criteria is true (Join Date = System Date).

For general information about adding new fields that are used in promotion criteria, see “Allowing New Fields to Be Used in Loyalty Promotion Criteria” on page 164.

Creating Reward Promotions that Apply to the First Transaction on Day the Member Enrolls

You can create a promotion that will only give a bonus for the first transaction on the day the member enrolls, as follows:

■ Configure the product so the Joined Date field in Member > More Info view can be used as a criteria for a promotion. This field tracks a member's enrollment date. For information about using this field as the basis of a promotion, see “Changing the Fields Used in Loyalty Attributes” on page 19.

■ Create a promotion with:

   ■ A promotion-specific attribute that records whether the member has received the bonus (since the member should only get the bonus once).

   ■ Give the first rule for this promotion these two criteria: 1) Transaction Date = Joined Date, 2) Member has not yet received the bonus.

   ■ In addition, give the first rule for the this promotion these two actions: 1) Give the member the bonus, 2) Update attribute to show 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 later transaction first, then bonus applies to the later transaction.

Letting Inactive Members Redeem Current Points But Not Earn New Points

To set up the program so members who become inactive can redeem the points that they have already earned, but not earn (accrue) any additional points, make the following changes:

In Siebel Tools, configure Loyalty as follows:

■ In the business component LOY Member, create a calculated field called *MVField* that displays the status of the active membership card.

■ In the business component LOY Engine Member, create the same calculated field.

In Siebel Loyalty:

■ In the List of Values Administration view, add a new record for LOY_ATTRIB_FIELDS_MEMBER with the value *MVField*.

■ Create a Member Attribute based on the field MVField.

■ Use this attribute in the criteria of all Accrual promotions, so these promotions take their actions only if the membership card is active.

■ Do not use this attribute in the criteria of Redemption promotions, so these promotions take their action whether or not the membership card is active.

For general information about adding new fields that are used in promotion criteria, see "Allowing New Fields to Be Used in Loyalty Promotion Criteria" on page 164.

Loyalty Promotion Examples

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

There is also an example of how to create a tier promotion in "Example of Creating Tier Promotions" on page 88.

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 may differ, depending on your business model.

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 # 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, you will need to create it and make it available to Siebel Loyalty. For more information, see "Defining Loyalty Features of Products, Price Lists, and Catalogs" on page 70.

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 is the first rule in the promotion because, if a member completes a flight that qualifies the member for the bonus, the actions must be taken in the following order:

■ Update the # of flights attribute.

■ Evaluate the attribute to see if the member has complete the required # of flights.

■ 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, create a promotion-specific attribute that tracks whether the member was given the bonus.

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

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

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

Field	Value
Name	Member Given Simple Freq Bonus
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=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 criteria that checks whether the member has not yet received a bonus as result of this promotion.

To create a rule that gives the member a bonus

1 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 = 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, add an action to change the promotion-specific attribute tracking whether the member has received the bonus to Yes.

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

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

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

Section	Field	Value
	Sequence	3
	Name	Set Bonus Given Prom-Spec Att to Yes
	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

To reset the number of flights attribute to zero

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

Section	Field	Value
	Sequence	2
	Name	Set SFO-LAX PS Att to Zero
	Type	Update Attribute
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 will be active during the period between the start date and the end date.

Example of Creating a Complex Frequency Promotion

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

For example, during a specific period:

■ Fly DEN - CHI 3 times, receive 1,000 bonus

■ Fly DEN - CHI 4 or 5 times, receive 3,000 bonus

■ Fly DEN - CHI 6 or more times, receive 5,000 bonus

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 may 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 will be processed at a pre-set date and the decision to give bonus points will not be triggered by a transaction. Thus, it will always apply automatically.

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

To create the promotion record
1 Navigate to the Loyalty Promotions Administration screen.

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

Field	Value
Name	Complex Frequency DEN - CHI Promotion
Always Apply	No
Apply To	Accrual-Product
Promotion Start	1/21/2006
Promotion End	4/1/2006
Product Inclusion	Include Products
Final Action	4/10/2006

3 Click the Promotion #.

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

NOTE: If this product does not exist in your database, you will need to create it and make it available to Siebel Loyalty. For more information, see "Defining Loyalty Features of Products, Price Lists, and Catalogs" on page 70.

Creating the Attribute for the Promotion

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

To create the attribute for this promotion

1 Click the Promotion Specific Attributes view tab.

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

Field	Value
Name	DEN - CHI Complex Freq Promo Attribute
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
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 = Indigo Airlines
Type of Comparison	Compare to Values
Object	Transaction
Attribute	Partner
Condition	Equals
Value	Indigo Airlines

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

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

To create a rule that give the members a 1000 point bonus for 3 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 = 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
Name	# of DEN-CHI Flights = 3
Type of Comparison	Compare to Values
Object	Promotion
Attribute	DEN - CHI Complex Freq Promo Attribute
Condition	Equals
Value	3

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

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

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

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

2 Click the rule name.

3 In the Criteria list, 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	# of DEN-CHI Flights = 4 or 5
Type of Comparison	Compare to Values
Object	Promotion
Attribute	DEN - CHI Complex Freq Promo Attribute
Condition	Equals
Value	4
Value	5

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

4 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 3,000 Regular NQ Points
Type	Assign Points
Point Type	Regular
Value	3000

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

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

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

2 Click the rule name.

3 In the Criteria list, 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	# of DEN-CHI Flights >= 6
Type of Comparison	Compare to Values
Object	Promotion
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 will keep track of the number of times that members fly between the start date and the end date. Then, on the day after the date in the Final Action Date field, it will give points to members based on the total number of DEN-CHI flights they took during this period.

To activate the promotion

1 In the thread bar, click Promotion:Complex Frequency DEN - CHI Promotion.

2 In the Promotion form, click Activate.

The promotion will be 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 section 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, the referral bonus is not given.

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

Because this 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. You can create other action-based bonuses, if you create the products for them.

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 Manually and Automatically" on page 21.

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	Accrual-Product
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 # 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 #	Registration Bonus

NOTE: If this product does not exist in your database, you need to create it and make it available to Siebel Loyalty. For more information, see "Defining Loyalty Features of Products, Price Lists, and Catalogs" on page 70.

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 below 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 1K 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 will be active during the period between the start date and the end date.

When a member should 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 = Airline Name

- Departure Airport = XXX

- Arrival Airport = YYY

- Enrollment = may or may not be required

- Flight Date = Between Date 1 and 2

- Roundtrip = Completed

Its action may 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:

- Round Trip Connection Gap (in Hours)

- Round Trip 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 # 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 #	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 #	Loyalty Flights

NOTE: If these products do not exist in your database, you need to create them and make them available to Siebel Loyalty. For more information, see "Defining Loyalty Features of Products, Price Lists, and Catalogs" on page 70.

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 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 criteria 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 criteria, you should 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

Field	Value
To Recorded Roundtrip Info: Object	Transaction
To Recorded Roundtrip Info: Attribute	Roundtrip SFO-DEN Attribute

6 In the Values list below 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 is the first half of a possible round-trip.

The criteria 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 criteria 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 below 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

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 will be active during the period between the start date and the end date, and the member will 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.

For more information about how to set up partners and work with partners, see Chapter 7, "Using Siebel Loyalty with Partners."

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.

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
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 # 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 #	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 #	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, you need to create it and make it available to Siebel Loyalty. For more information, see "Defining Loyalty Features of Products, Price Lists, and Catalogs" on page 70.

Creating Promotion-Specific Attributes

Create two promotion-specific attributes, one to track 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	# 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	# 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 updates 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 # of DEN-SFO promo-spec 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 Compare to Values detail form, enter the fields shown in the following table.

Field	Value
Object	Transaction

Field	Value
Attribute	Partner
Condition	Equals

6 In the Values list below 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 # of DEN-SFO flights promo-spec attribute
Type	Update Attribute
Update this attribute: Object	Promotion
Update this attribute: Attribute	# 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 # 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 = Speedy Car Rental
Type of Comparison	Compare to Values

12 In the Compare to Values detail form, enter the fields shown in the following table.

Field	Value
Object	Transaction
Attribute	Partner
Condition	Equals

13 In the Values list below 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 # of Speedy Car Rentals promo-spec attribute
Type	Update Attribute
Update this attribute: Object	Promotion
Update this attribute: Attribute	# 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 may have more than the required value for one attribute before reaching the required value for the other.

To create a rule that gives members the 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	# of Speedy car rental days >= 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	# of Speedy Car Rentals
Condition	Is Greater Than

6 In the Values list below 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	# of DEN-SFO flights >= 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	# of DEN-SFO Flights
Condition	Is Greater Than

9 In the Values list below 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
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 will be active during the period between the start date and the end date. Member's will receive the bonus points for making the required purchases.

Debiting Points From a Partner for a Joint Promotion

When points are given as a result of a promotion, they are deducted from the point block of the company associated with that promotion. Only one company, partner or host, can be associated with a promotion in this way.

For joint promotions sponsored by both the host company and a partner, you may want points to be deducted from both companies. For example, if a member receives 100 points, you may want 50 points deducted from the host company and 50 points deducted from the partner.

It is not possible to do this automatically. To debit points from both companies, you should:

■   Create a point block used only for this joint promotion that is associated with the host company.

■   Associate this point block with the joint promotion.

■   Bill the partner the appropriate amount when the promotion is over.

Using the point block only for this promotion allows the host company to see exactly how many points were given through this promotion, so it can bill the partner the appropriate amount. For example, it can bill the partner 50% of the total number of points.

Troubleshooting Action-Based Bonuses

If an action based bonus does not work properly, check to be sure 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

6 Host Organization's Use of Siebel Loyalty

This chapter covers the ways that employees at the host company use Siebel Loyalty after the application, programs, and promotions have been set up. It includes the following topics:

About the Host Organization's Use of Siebel Loyalty

After the loyalty administrator has set up loyalty programs and promotions, member service representatives work directly with program members. For example:

■ A customer may telephone a member service representative and ask to be enrolled as a member in a loyalty program.

■ A member may telephone a member service representative and ask to redeem points for a reward.

Salespeople also work with program members. For example, salespeople will sell products that earn bonus points for members. Depending on your business model, salespeople may redeem members' points for rewards.

This chapter covers the ways that member service representatives, salespeople, and other employees of the host organization work with members of loyalty programs.

Other people can also perform some of the same tasks as your employees:

■ **Partners.** Depending on your business model, member service representatives at partner companies may perform some of these tasks for your members. For more information, see Chapter 7, "Using Siebel Loyalty with Partners."

■ **Members.** Members can use eLoyalty to perform some of these tasks for themselves. For more information, see Chapter 8, "Member Self-Service with Siebel eLoyalty."

Enrolling Members in Loyalty Programs

There are four types of members of loyalty programs:

■ **Individual.** This type of member includes people who join programs on their own behalf. They must make purchases themselves to earn points.

■ **Household.** This type of member includes people who join programs to earn points for the household's membership. Any household member can make purchases to earn points.

■ **Account.** This type of member includes companies that join programs. The company earns points for its purchases.

■ **Partner.** This type of member includes companies that are partners that join programs. For example, a dealer may be a partner of an automobile manufacturer, because its customers earn the manufacturer's points when they buy cars. The same dealer may join a loyalty program as a member, so the manufacturer will reward it with points for meeting sales goals.

To enroll a new member in a loyalty program, the member service representative must perform two steps:

■ Enter member information, such as name, address, and communication preferences.

■ Assign the member a user name and password. The user name and password are always assigned to a person, not to a company. If the member is an account, partner, or household, the password is assigned to the person who is the primary contact.

In addition to the four types of memberships previous described, you can create multi-level memberships with parent-child relationships between members. For example, a company could set up an account membership, its employees could set up individual memberships, and by linking the account membership as a parent to all of the individual memberships as children, you could allow the account membership to earn points whenever its children memberships earn points. For information about creating parent-child memberships, see "Enrolling Members in Multi-Level Loyalty Programs" on page 205.

CAUTION: If you have set up a registration bonus, it will be applied only if the member is enrolled in the Member screen, as described here. If you add new members in some other view, they will not get registration bonuses. For more information about registration bonuses, see "Example of Creating an Action-Based Bonus" on page 182.

To enter member information

1 Navigate to the Loyalty Members screen.

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

Field	Comments
Member Name	Enter the name of the member. This could be the name of an individual, an account, a household, or a partner.
Member Type	Choose one of the types of members of loyalty programs: individual, household, account, or partner.
Contact First Name and Contact Last Name	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.
Account	If the member type is account or partner, select the company name.
Household	If the member type is household, enter the household name.
Referred By	Select the name of the member who referred the new member, if applicable.

3 Click the Member # field hyperlink.

4 Enter address information for the new member:

a If the member type is Account or Partner, click the Account Addresses view tab, add a new record to the list, and complete the necessary fields.

b If the member type is Individual, click the Contact Addresses view tab, add a new record to the list, and complete the necessary fields.

c If the member type is Household, click the Household Addresses view tab, add a new record to the list, and complete the necessary fields.

5 Optionally, click the Communication Preferences view tab and enter information about how to contact the member.

6 Optionally, click the Credit Cards view tab, 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 will be used as the default payment method for loyalty transactions requiring payment. For more information about credit card payments, see *Siebel Order Management Guide*.

7 Optionally, click the Hobbies view tab, add a new record to the list, and enter information about the member's hobbies.

8 Optionally, enter the member's travel profile, as described in "Entering Loyalty Members' Travel Profiles" on page 208.

9 Optionally, track the member who referred this new member, as described in "Entering Loyalty Member Referrals" on page 207.

10 Optionally, you can also enroll the new member in your partner's loyalty programs:

a Click the Partner Memberships view tab.

b Add a new record to the Partner Membership list, and complete the necessary fields.

To assign a member a user name and password

1 Navigate to the Administration - User > 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	Comments
Last Name and First Name	If the member is an individual, enter the name of that person. If the member is a household, account, or partner, enter the name of the primary contact for the member.
User ID	Enter the log-in name for the user.
Challenge Question	Enter a question that users can enter to establish their identity if they forget their log-in name or password.
Challenge Answer	Enter an answer to the challenge question.
Responsibility	Select the appropriate responsibility for 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 Multi-Level Loyalty Programs

A multi-level loyalty program is a program that rewards a member on the basis of other members' behavior. Examples of multi-level loyalty programs are:

■ **Insurance companies and agents.** An insurance underwriter sets up a loyalty program for insurance agencies and their agents. Both the insurance agency and the agents receive a bonus when an agent sells the underwriter's products. Alternatively, just the insurance agency may receive a bonus when the agent sells the underwriter's products.

■ **Distributors and sub-distributors.** A manufacturing company uses distributors to sell its products, and these distributors use sub-distributors to sell these products. For example, the manufacturer sends goods by the shipping container to the distributors, the distributors ship the goods by the pallet to the sub-distributors, and the sub-distributors ship individual products to retail stores. The manufacturer sets up a loyalty program to reward distributors for sales (to encourage them to sign up more sub-distributors) and also to reward the sub-distributors for their sales.

■ **Some airline frequent flyer programs.** Some airlines have frequent flyer programs where a company earns points whenever its employees fly on company-related business. Members may have their own separate individual memberships that they use to earn points for themselves when they are on non-business related trips.

A multi-level loyalty program has a parent member and children members. In the examples:

■ Insurance agencies are parent members and their agents are children members.

■ Distributors are parent members and their sub-distributors are children members.

■ Corporations are parent members and the corporation's employees are children members.

Setting Up a Multi-Level Loyalty Program

You set up a multi-level loyalty program by enrolling all program participants as members, then associating some members as child members with a specific parent member.

To enroll members in a multi-level loyalty program

1 Enroll parent members and children members separately, as described in "Enrolling Members in Loyalty Programs" on page 202.

2 Associate children members with their parent members.

To associate a child member with a parent member

1 Navigate to the Loyalty Members screen.

2 In the Members list, click the Member # hyperlink for the parent member.

3 Click the Child Members view tab.

4 In the Child Members list, add one or more new records.

5 In the Contact field, Account field, or Household field of each new record, select child members
for this parent member.

In the child member's record in Member > More Info view, the parent member is now shown in
the Parent Member field.

Rolling Up Points from Child Members to a Parent Member

Siebel Loyalty allows 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.

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 non-qualifying 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 non-qualifying 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. 100 qualifying points and 100 non-qualifying points are
redeemed from the child member. However, the system does not nullify the qualifying points. The
child member's available points balance = 0, and the qualifying points balance = 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
non-qualifying points are accrued to the parent member (the company). The parent member's
available points balance = 200, and the qualifying points balance = 100. The transaction has no
effect on the point block.

You must add the child member and parent member before you can roll up points in this way.

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 # 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 # hyperlink.

7 Click the More Info view tab, and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Accrual To	Member to which the child's points will be 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 system will add 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.

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" on page 182.

NOTE: If members register through the Web and enter the members who refer them, these referrals are also displayed in the Referrals list.

To enter a member referral

1 Navigate to the Loyalty Members screen.

2 In the Members list, select the member who referred a new member.

3 Click the Member # 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.

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, their preferred hotels, and their preferred car-rental agencies.

Members can enter their travel profile through the eLoyalty Web site, or the Member Service Representative can enter the travel profile.

NOTE: The values available in the travel profile depend on the partner type entered in the Partner > 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 should be able to select in one of these fields, then go to Partner > 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 # hyperlink.

3 Click the Travel Profile view tab.

4 In the Travel Profile form, click New and complete the necessary fields.

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.

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 is used to enroll the member in a new promotion.

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.

To enroll a member in a promotion

1 Navigate to the Loyalty Members screen.

2 In the Members list, select the member to be enrolled.

3 Click the Member # hyperlink.

4 Click the Promotions view tab.

5 In the Promotions link bar, click Enrolled Promotions.

6 Add a new record to the Promotions list.

7 In the Loyalty Promotions dialog box, select the appropriate promotion and click OK.

Entering Loyalty Members' Transactions

A Transaction is any action that accrues ("earns") or debits ("burns") points for a member. There are two types of transactions:

■ **Accrual Transactions.** The member performs some activity that earns points. Some examples are flying between specified cities, staying in a hotel, spending money on a purchase, or selling products.

■ **Redemption Transactions.** The member redeems points for a reward. Some examples of rewards are a product, a service, or an upgrade.

The member can also perform some of these transactions in other ways. For example, the member might earn points by purchasing a product from a retailer or redeeming points using eLoyalty. These transactions will also be listed in the Transactions view of the Loyalty Members screen, so member service representatives can use this view to look at a complete list of member transactions.

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.

To enter a transaction

1 Navigate to the Loyalty Members screen.

2 In the Members list, click the Member # field of the member.

3 Click the Transactions view tab.

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

Field	Comments
Transaction Date	Displays the date when the transaction occurred. This 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 an Accrual or Redemption.
Sub Type	Select the Subtype for the transaction. For accrual transactions, the subtypes are Action Based Bonus, Cancellation, Gift, Loan, and Product. For redemption transactions, the subtypes are Cancellation, Loan Repayment, Product, and Transfer.

Field	Comments
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, the user can process the transaction in real time by clicking the Process button. The engine will not process transactions with this status; the user must click the Process button. For information about when transactions are created with the status Acceptable, see "Allowing Manual Processing of Queued Loyalty Transactions" on page 20. ■ **Queued.** If the status is Queued, the engine component that is invoked by clicking the Process button will not process this transaction. It is only processed by the batch engine. ■ **Will process the transaction**. A MSR may do this immediately after creating a transaction or after a transaction is approved. In addition, transactions that are imported in bulk are usually given this status. ■ **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 may also display the following values, generated by the application: ■ **Rejected - Engine: Insufficient Points.** The application sets the field to this value if the member does not have enough points for the redemption transaction. ■ **Rejected - Engine: Missing Member Data.** The application sets the field to this value if required data about the member is missing.

Field	Comments
Product Name	If the subtype is Product, select the name of the product.
Base Points	Displays the minimum number of points a member would receive (if this is an accrual) or use (if this 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" on page 16.
Qualifying Points	Displays whether the base points are qualifying or non-qualifying (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 Step 6. For information about setting up the manager's approval limit, see "Adding Employees as Loyalty Users" on page 42.
Voucher #	If this is a redemption of a voucher, enter the voucher number.
Voucher Type	If this is a redemption of a voucher, enter the voucher type.
Voucher Qty	If this is a redemption of a voucher, enter the quantity of vouchers redeemed.
Total Points	Displays the total number of points accrued or debited by point type. Automatically generated by the Siebel Loyalty Engine.

5 You can view more information about a transaction by clicking the hyperlink in the Transaction Id field. Look at the Accrual Items list, if this 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:

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.

Entering Loyalty Members' Orders

When you enter an order for a loyalty 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 & 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 currency charges.

For detailed information about entering orders, see the chapter on creating a quote or order in *Siebel Order Management Guide*.

Entering a member's order

1   Navigate to the Loyalty Members screen and locate the member whose order you want to enter.

2   Click the hyperlink in the Member # 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 # 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 table that follows.

Field	Comments
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 your system has Taxware installed, from the view-level menu, choose Calculate Tax.

     The system updates the totals 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, click Authorize.

11 Click Submit.

     A Transaction is automatically created for each order line item that accrues or debits points.

To verify that transactions were created

1   Navigate to the Loyalty Members screen and locate the member whose order you entered.

2   Click the hyperlink in the Member # field and click the Transactions view tab.

3   In the Transactions list, query for the Order # of the order you just processed.

4   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 is only available for products that are set up for multiple methods of payment. For more information, see "Setting Up Products for Payment with Loyalty Points" on page 36.

When you enter an order to be paid with a combination of points and money, the system 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, the system 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 # 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 # 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 table that follows.

Field	Comments
Product	Select a product that is set up for multiple methods of payment.
Net Price	Displays what the product will cost in currency, after the value in the Points field is subtracted from the total price of the item.
Txn Type	Select Redemption.
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, the system 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 your system has Taxware installed, from the view-level menu, choose Calculate Tax.

The system updates the totals to reflect the taxes charged on the order.

11 Click the Payments view tab and enter a form of payment for the non-points balance.

12 If the form of payment is a credit card, click Authorize.

13 Click Submit.

To verify the multiple payment types redemption

1 Navigate to the Loyalty Members screen and locate the member whose order you entered.

2 Click the hyperlink in the Member # field and click the Transactions view tab.

3 In the Transactions list, query for the Order # of the order you just processed.

The Redemption Items list near the bottom of the view displays a record for only the number points actually redeemed for the order.

Seeing If a Loyalty Transaction Has Accrued Multiple Point Types

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 see if a transaction gave a member points of different point types

1 Navigate to the Loyalty Member screen.

2 Click the Member # 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 > Accrual Items view.

Approving Loyalty Members' Transactions

Some transactions may 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" on page 42.

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 Member screen.

2 Click the Member # 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 selection from In Progress to Submitted.

   The system 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 selection 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 may 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, they can call the help desk to have the member service representative cancel the redemption. They must call before the redemption has been fulfilled.

If members change their minds and decide to earn points in a partner's loyalty program instead of in your loyalty program, they can call the help desk to have the member service representative cancel the accrual that they earned previously.

If a member cancels a redemption, some of the points may have expired since the member redeemed them. If so, these points will no longer be available if the redemption is cancelled. These points are added back to the member's account, but they are past their expiration date and cannot be used. It is necessary for these points to be expired, because otherwise members could perform transactions and then cancel them, in order to avoid point expiration dates.

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, 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, 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, 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.

To set a cancel action for member attributes

1 Navigate to the Loyalty Program Administration screen.

2 Locate the program that the attribute will apply 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 creating all attributes for the program, select the program form's Active check box.

To set a cancel action for promotion attributes

1 Navigate to the Loyalty Program Administration screen.

2 Locate the program that the attribute will apply 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 Promotion Specific Attributes.

6 In the Cancel Action field, select a Cancel Action.

7 When you are finished creating all attributes for the program, select the program form's Active check box.

To cancel a transaction

1 Navigate to the Loyalty Members screen.

2 In the Members list, select the member and click its Member # 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.

The application 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.

Entering and Modifying Loyalty Members' Service Requests

Members can enter service requests in the Loyalty Web site or can contact member service representatives with their service requests.

Member service representatives should be designated to view and deal with these service requests. One or more employees should be designated to assign service requests entered through the Web site to the appropriate owner.

Member service representatives should change the value in the Status field as they work on and close the service request.

To enter, view, or modify a member service request

1 Navigate to the Loyalty Members screen.

2 In the Members list, select the member and click its Member # 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	Comments
Summary	Enter a description of the service that the member requests.
Account	If the member is an account or partner, select the company name.
Last Name	If the member is an individual or household, select the member name.

Field	Comments
Status	Choose the status of the service request, for example, Pending, Submitted, Approved, or Closed. The member can view this status on the Web site.
Owner	By default, the employee, partner, or customer who enters the service request is the owner. If necessary, select the appropriate owner, who will deal with the service request. The service request will be visible to the owner in My Service Requests view.

Giving Vouchers to Loyalty Members

A voucher entitles a member to a specific product 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 two ways:

■ Vouchers are automatically assigned as tier rewards.

■ Vouchers are manually assigned by a member services representative.

Member service representatives can give vouchers to members and must record the dates when vouchers are redeemed.

Before the member service representative can give the voucher, a loyalty administrator must create it. For more information, see "Creating Vouchers for Loyalty Members" on page 68.

Giving Vouchers to Members

Member service representatives may give vouchers to members for a number of reasons, depending on your business model. For example, if a flight was delayed, all members on that flight might get a voucher for an upgrade on a future flight.

To give a voucher to a member

1 Navigate to the Loyalty Members screen.

2 In the Members list, select the member and click its Member # 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.

Using a Voucher

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 the system use one or more vouchers of some general voucher type. For example, an airline customer can have the system use three 500 mile upgrade vouchers. When the member uses a generic voucher type, the system 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).

Using a Voucher

1 Navigate to the Loyalty Members screen.

2 In the Members list, select the member and click its Member # 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 # 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 may want to manually change a member's tier status. For example, a consultant who travels continuously is a Platinum member, but this consultant is assigned to a project that requires no travel for nine months. By default, the consultant would lose Platinum status. Because you know the consultant will be a valuable customer again after this project is completed, you manually assign the customer Platinum status.

Before changing a member's tier status manually, a member service representative must investigate whether the member should be awarded a special status. This decision depends on your business model, but before doing it, the member service representative might evaluate the member by:

■ "Viewing Loyalty Members' Point Balances" on page 230

■ "Entering and Viewing Loyalty Members' Value Scores" on page 235

■ "Viewing Loyalty Members' Activities" on page 234

Entering and Submitting the Special Tier Status

When member service representatives decide that members should be awarded the special status, they enter the status and submit it to a manager for approval.

To enter and submit a special tier status

1 Navigate to the Loyalty Members screen.

2 In the Members list, select the member and click its Member # hyperlink.

3 Click the Tiers view tab.

4 Select the tier record that will be changed

5 Click Revise.

   A new record is created with the same value in the Tier Class field as record you selected.

6 In the new record, complete the necessary fields. Some fields are described in the following table.

Field	Comments
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, 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, those dates will be 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, 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, 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 is useful if members lose their cards.

To create a membership card manually

1 Navigate to the Loyalty Members screen.

2 In the Members list, select the member and click its Member # 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	Comments
Tier	Select the member's tier, which you can find in the Member form above the Memberships Card list.
Expiration Date	Enter the date when the membership card will expire.
Expiration Date on Card	Displays the date when the membership card will expire.

Lending Points to Loyalty Members

If a member has almost enough points to qualify for a desired redemption, some companies will lend the member enough points to qualify. The member will 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 non-qualifying points.

To decide whether to lend a member points, you can perform these tasks:

■ "Viewing Loyalty Members' Point Balances" on page 230

■ "Entering and Viewing Loyalty Members' Value Scores" on page 235

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" on page 42.

Member > More Info view: Max Point Loan and Max Point Loan Status)

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 # 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, in the Max Point Loan Status field, select Approved.

5 If you are not authorized to approve loans of this amount, 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 # 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	Comments
Type	Select Accrual (automatically populated).
Sub Type	Select Loan (automatically populated).
Product/Service	Select the product that was created to represent the loan. This should be a product with the name *Loan* or a similar name.
Points	Enter the number of points that will be loaned.
Point Type	Select the point type.
Submit To	Select the manager who must approve this request. By default, this field contains the name of the member service representative's manager. The member service representative may change this value, if, for example, the manager is on vacation.
Status	Select Submitted to submit the loan for approval.

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 will be used to pay back the loan.

To set up automatic repayment of loans, "Setting Up Points Loan Repayment" on page 21.

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	Comments
Product/Service	Select a product.
Points	Enter the number of points that will be repaid.
Point Type	Select the point type. This should be the same type used in the lone.
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.

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, 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, you must transfer the points back in a separate transaction.

■ Points can only be transferred between members of the same program.

To transfer points from one loyalty member to another

1 Navigate to the Loyalty Members screen.

2 In the Members list, click the Member # field of the donor member.

3 Click the Transactions view tab.

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

Field	Comments
Type	Select Redemption.
Sub Type	Select Transfer.
Product Name	The system automatically fills this field with Point Transfer.
Transfer To/From	Select the member who will receive the points.
Base Points	Specify the number of points to be transferred.
Point Type	Specify the type of points to be transferred.
Status	Select Submitted.

NOTE: Qualifying points are not transferred regardless of whether the Qualifying check box is selected or cleared.

This redemption transaction transfers the points out of the donor member's account. The system automatically creates and processes an accrual transaction that transfers the points into the recipient member's account.

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:

■ **Surviving Member.** The member that survives after the merge. You must select this member last when you do the multi-select before the merge.

■ **Deactivated Members.** The members that do not survive 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 surviving member is an individual, then all deactivated members must be individuals.

■ If the surviving member is an account or household, then the deactivated members can be of any type.

Results of the Member Merge

This section describes how data from all the records are merged into the surviving record when you perform the merge:

■ **Points.** The system adds up the Available, Lifetime and Qualifying Points of all members, and it gives the total to the surviving member.

■ **Last Transaction.** The system compares the dates when the last transaction was processed for all members, and it uses the latest date as the last transaction of the surviving member.

■ **Contact Campaigns, Activities, Transactions, Vouchers, Service Requests, Statements, and Membership Cards.** The system gives the Contact Campaigns, Activities, Transactions, Vouchers, Service Requests, Statements, and Membership Cards of all the members to the surviving member. The system 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.** The system has the surviving member keep the same tier that it had before the merge. However, the member's tier is recalculated based upon the new combined point total at the next regularly scheduled tier recalculation.

■ **Tier History.** The system gives the combined tier histories of all the members to the surviving member. This means that the tier history will show 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 the system keeps the surviving member's information.

■ If different contacts were used and these are individual memberships, then the system keeps the surviving 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 the system adds all contacts to the surviving membership. The user decides which of these contacts to keep.

■ **Enrolled Promotions.** The enrolled promotions of all members are combined.

Attributes

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

If attributes cannot be added together, the system keeps the attribute value from of the surviving member. For example, this applies to attributes with values such as yes/no.

If attributes can be added together, then they are added. For example, this applies to numeric totals.

You can specify how attributes are added by selecting an option in the Merge Action field of the Loyalty Program Administration > 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 surviving member. This 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 surviving member.

■ If Standard is selected in the Merge Action field, then the merge gives the surviving member the same value that the surviving 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 Table 15.

Table 15.   Merge Actions for Data Types

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 surviving 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. **Sum.** Replaces number with the sum of the numbers for the attribute for all members. **Standard.** Keeps the number for the attribute that the surviving member had before the merge.
String	**Standard.** Keeps the value for the string that the surviving 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, the surviving member keeps only the tiers that the surviving member qualified for before the merge. If it is set to N, the surviving member keeps all tiers of all merged members.

■ **Delete Merged Contacts.** If this user property is set to Y, the surviving member keeps only the contacts that the surviving member had before the merge. If it is set to N, the surviving member keeps all contacts of all merged members.

■ **Delete Non-Qualified Merged Promotions.** If this user property is set to Y, the surviving member keeps only the promotions that the surviving member was enrolled in before the merge. If it is set to N, the surviving 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, multi-select all the records you want to merge, while holding down the Shift key.

NOTE: Be sure to select the deactivated members first and the surviving member last. The system 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 # is that of the intended surviving member, and click OK.

This adds all the merged members' attributes, points, activities, vouchers, service requests, promotions, and referrals to the survivor member's existing items. In addition, the system empties the merged member records of these items and then deletes it.

NOTE: The deactivated member records are deleted.

Viewing Loyalty Members' Point Balances

A member service representative can view members' point balances:

■ To answer members' question about how many points they have.

■ To decide whether to change members' tier status, as described in "Changing Loyalty Members' Tier Status Manually" on page 221.

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 # 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.

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 then were earned from a single transaction or point item, most transactions will 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, 500 of those points will be 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 see 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 # 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.

Viewing Loyalty Members' Transaction Histories

Employees, members, and partners need to be able to see the points that were credited or debited to a member based upon members' transactions. For example, you may have to look at the transaction history to resolve members' questions about their point balance.

The Transactions view of the Members screen allows you to look at the history of all the transactions that affected a given member's point balance.

For more information about the Transactions view, see "Entering Loyalty Members' Transactions" on page 209.

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 may 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" on page 61. 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, 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 was not processed until March 2, this transaction would be included in a statement that covered March 1 to March 31, because its Processed On date falls within the statement's Start and End Dates.

To generate a statement

1   Navigate to the Loyalty Members screen.

2   In the Members list, select the member and click its Member # hyperlink.

3   In the Member 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.

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 # hyperlink.

3   Click the Statements view tab.

4   In the Statements list, click the Statement # 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	Comments
Start Date	Displays the start date of the statement.
End Date	Displays the end date of the statement.
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" on
page 223.

■ The Transactions view lists all the member's transactions for the period of the statement. For
information about transaction fields, see "Entering Loyalty Members' Transactions" on
page 209.

■ The Vouchers Outstanding view lists any vouchers that are available to the member. For more
information, see "Giving Vouchers to Loyalty Members" on page 220.

■ The Vouchers Used view lists any vouchers that the member used during the statement
period. For more information, see "Giving Vouchers to Loyalty Members" on page 220.

■ The Frequency Bonuses view lists the points that a member received as the result of a frequency promotion. 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, each flight would be listed as a transaction in the Statement > Transactions view, and the 1,000 points would be listed in the Statement > Frequency Bonuses view. For more information about frequency bonuses, see "Types of Loyalty Promotions" on page 135.

Field	Comments
Point Type	Displays the point type needed to qualify for this bonus.
Qual	If this check box is checked, only qualifying points count toward the bonus. If it is not checked, only nonqualifying points count toward the bonus.
# 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, displays the date when the system gave the member the bonus.

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 # of the statement you want to print.

4 Click the Reports button and select Statement.

5 Use the Reports window to print the statement.

Viewing Loyalty Members' Activities

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 # hyperlink.

3 Click the Activities view tab.

Entering and Viewing Loyalty Members' Value Scores

As the member value score, you can select a number from 1 to 5, to indicate the member's value as a customer.

To enter or view a member's value score

1 Navigate to the Loyalty Members screen.

2 In the Members list, select the member and click its Member # hyperlink.

3 Click the More Info view tab.

The member's value score appears in the Member Value section, in the Lifetime Value Score field.

4 To enter the member's value score, select a value in the Value Score field.

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" on page 137.

To view a member's attributes

1 Navigate to the Loyalty Members screen.

2   In the Members list, click the Member # of the member whose attributes you want to view.

3   Click the Member Attributes view tab.

Viewing Loyalty Members' Promotion Attributes

Promotion attributes are 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" on page 137.

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 # hyperlink.

3   Click the Promotion Attributes view tab.

7 Using Siebel Loyalty with Partners

This chapter gives you background information about how partners use Siebel Loyalty:

- *"About Partner Use of Siebel Loyalty" on page 237*
- *"Overview of Partner Use of Siebel Loyalty" on page 237*
- *"Scenario for Partner Use of Siebel Loyalty" on page 238*

This chapter also explains the tasks that you perform at the brand owner company in order to manage partners, including the following topics:

- *"Creating Loyalty Promotions with Partners" on page 239*
- *"Entering the Loyalty Partner Program Profile" on page 240*
- *"Selling Loyalty Points to Partners" on page 240*
- *"Sending Transactions to Partners for Review" on page 242*
- *"Managing Loyalty Partners' Rejected Transactions" on page 242*
- *"Exposing Additional Views to Loyalty Partners" on page 243*

For more information about giving partners access to Siebel Loyalty, see *"Process of Setting Up Partner Access to Siebel Loyalty" on page 43*.

About Partner Use of Siebel Loyalty

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

The host company uses the Loyalty Partner Portal to interact with its partners by sharing member information, jointly creating promotions, and reviewing and editing transactions. The Loyalty Partner Portal allows the host company to provide a simple interface to partners without worrying about the technical requirements of the high interactivity 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 allows partners to work with members in many of the same ways that your own member service representatives work with members. There are some minor differences between the Siebel Loyalty Partner Portal and the screens of Siebel Loyalty that your own member service representative use, because the Partner Portal supports standard interactivity and Siebel Loyalty supports high interactivity, but these screens are used in similar ways.

■ It includes functionality to support tasks that apply only to partners.

A few of the most common tasks performed by partners are:

■ **Enrolling Members 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" on page 202.

■ **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' Transactions" on page 209.

■ **Collaborating On Loyalty Promotions.** Partners use the Partner Portal to collaborate on Loyalty Promotions. For more information, see "Creating Loyalty Promotions with Partners" on page 239.

■ **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 may use Siebel Loyalty. Your partners may use Loyalty differently, depending on your business model.

The Partner Enrolls a New Member

An automobile manufacturer is running a special promotion, which allows dealers to give away 25,000 points with the purchase of any car.

A dealer sells a car to a customer who does not yet have a Loyalty account. The dealer uses the Loyalty Members screen of the Partner Portal to enroll the customer in the loyalty program.

The 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 Loyalty 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.

Creating Loyalty 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" on page 137, 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, 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" on page 192. This 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, they can do so by going to 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 may have to sell additional points to the partner for the promotion. Do this in the same way you sell points to partners for the loyalty program, as described in "Selling Loyalty Points to Partners" on page 240.

- **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.

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

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.

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

Selling Loyalty Points to Partners

Partners must purchase points from you, 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 partner's point balance (as tracked by point blocks). If the partner does not have enough points to give to the member, the transaction will be rejected.

Partners generally purchase points from the host company in two ways:

■ **Pre-Purchase.** The partners buy points in large chunks before members earn the points. A point block representing the amount of points purchased is created and activated. When a partner's pre-purchased point balance gets 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, the host company can create and activate a reserve point block that will only be used if the pre-purchased point block runs out of points. If the reserve point block is used, then host company charges the partner for these points as well as for another large point block.

■ **Post-Purchase.** The partner pays for points only after they have been given to members. The host company creates a very large point block for the partner. If the partner is charged for points on a monthly basis, for example, the host company looks at the end of each month to see how many additional points have been debited from the point block since the end of the previous month and charges the partner for these points.

The partner manager can view the information that the partner entered by going to the Point Block Purchases view of the Partners screen. The partner manager changes the status to approved in order to make the points available.

The Point Block view also lists all previous blocks of points that the partner has purchased, so the host company can also use it to view the partner's point purchasing history.

Before you make the points available to partners, you must create the points, as described in "Minting Point Blocks for Loyalty Programs" on page 59.

NOTE: You can also make points available for partners to purchase in the Loyalty Program Administration > Points Blocks view.

To make points available for partners to purchase

1   Navigate to the Partners > Partner List view.

2   In the Partners list, select the partner company that you will 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.

To activate points so they can be used by partners

1   Navigate to the Partners > 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 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.

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 should select the partner employee who should review it in the Submit To field.

The partner can receive the transaction for review in two ways:

■ **Through the Partner Portal.** The partner reviews each transaction in the Transactions Approval view of the Transactions screen of the Partner Portal and selects the status Acceptable or Rejected.

■ **Through an external application.** The transactions can be send back and forth between 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.

Managing Loyalty Partners' Rejected Transactions

Partner's Loyalty transactions may be rejected for a number of reasons.

For example, partners purchase point blocks. When they give points to a customer, these points are deducted from the partner's point block. If a partner no longer has enough points to cover a transaction, that transaction is rejected.

The host company must manage these rejected transactions.

Identifying and Commenting on Rejected Transactions

The host company's Loyalty administrator should 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 administrator should 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 > Processing Info view and look at the Processing Error Info field to determine why the transaction was rejected.

  b Navigate to the Loyalty Transactions > 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 > 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 Loyalty Partners

You may want to expose additional views to your partners.

The views that are visible to any user are controlled by that user's responsibility. Loyalty partners have the responsibility *Loyalty Partner Representative (LPR)*.

To make views visible to your partners, add them to this responsibility. For more information, see *Siebel Security Guide*.

8 Member Self-Service with Siebel eLoyalty

This chapter gives you background information about how customers and members can use Siebel eLoyalty through the Web. It covers the following topics:

- "About Siebel eLoyalty" on page 245
- "Overview of Member Use of Siebel eLoyalty" on page 245
- "Scenario for Member Use of Siebel eLoyalty" on page 246
- "Troubleshooting Display of the Catalog and Products to Loyalty Members" on page 248

For information about giving members access to Siebel eLoyalty, see "Setting Up Customer Access to Siebel eLoyalty" on page 45.

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 as members. Members can use Siebel eLoyalty to perform many activities for themselves, rather than calling member service representatives.

This chapter gives you background information about how members use Siebel eLoyalty.

Siebel eLoyalty works 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, the same information is entered in the Siebel database that would be entered if the member telephoned a member service representative to enroll. Thus, you can work with this information as you with any information about members.

Overview of Member Use of Siebel eLoyalty

When non-members go to the eLoyalty URL as anonymous users, they can:

- Register in order to enroll in loyalty programs, either on their own behalf, on behalf of their household, or on behalf of their company.
- View special offers on the eLoyalty home page.
- Browse the product catalog.

When members go to the eLoyalty URL, they can log in and then:

■ **View the personalized home page.** This page has links to special offers and to many features of eLoyalty, as well as information about their own membership (their Member #, the programs they are enrolled in, their member level, the date they became a member, their member type, their point balance, and their special status, if any).

■ **Enter and edit profile information.** View, enter, and edit information about the member.

■ **Buy products.** Browse the product catalog to buy products and see how many points they will earn by buying these products.

■ **Redeem points.** Browse the product catalog to buy products by redeeming points that they have already earned.

■ **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 Member Use of Siebel eLoyalty

This scenario gives one example of how members may use Siebel eLoyalty. Your members may use eLoyalty differently, depending on your business model.

The Member Enrolls and Enters Profile Information

A customer of a supermarket learns that she can get points toward airfare and hotel expenses by being a member of the supermarket's new loyalty program.

The customer goes to the Web site URL that was mentioned in the supermarket's brochure.

The customer looks at the home page, which has more information about the program, and sees that there is a 50 point bonus just for signing up. The customer also clicks the Exclusive Promotions links and sees the details of the special promotions that are available only to members.

The customer decides to join the program and clicks 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 will receive 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 Display of the Catalog and Products to Loyalty Members

If the catalog and products are not visible in the eLoyalty member portal, correct the settings described in this section 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 - 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 Loyalty member, the contact, the
product, and the price list. If the appropriate products do not appear in the member portal, make
sure the organizations are the same for all these.

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, 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, 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, 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, add it to the list.

    e Close the dialog box.

A   Siebel Loyalty Workflows and Methods Reference

This appendix documents workflows and methods that are specific to Siebel Loyalty. It includes the following topics:

- "Siebel Loyalty Workflows" on page 251
- "LOY Processing Engine Business Service" on page 254

Siebel Loyalty Workflows

Table 16 lists and describes Siebel Loyalty workflows.

Table 16.   Siebel Loyalty Workflows

Loyalty Workflows	Description
LOY ABB New Member Process	Calls LOY Action Based Bonus Subprocess (for Part Number = Registration Bonus) and LOY Action Based Bonus Referral SubProcess (if needed) to do the following: ■ Create a new transaction for an Action based Bonus of the type Registration Bonus. ■ Check whether there is need to create a referral Bonus transaction.
LOY ABB Web Update Process	Calls LOY Action Based Bonus Subprocess (for Part Number = Web Update Bonus) to create a new transaction for an Action based Bonus of the type Web Update Bonus.
LOY ABB Web Update Shell Process	Calls the workflow LOY ABB Web Update Process after certain member data are updated in the customer application.
LOY Action Based Bonus Referral SubProcess	Creates a new transaction for the referring member with an Action based Bonus of the type Referral Bonus.
LOY Action Based Bonus Subprocess	When called by LOY ABB New Member Process, creates a new transaction for an Action based Bonus of the type Registration Bonus. When called by LOY ABB Web Update Process, creates a new transaction for an Action based Bonus of the type Web Update Bonus.
LOY Activate Promotion Process	Invoked when a promotion is activated. Validates whether the minimum necessary rules, criteria, and actions are defined.

Table 16.   Siebel Loyalty Workflows

Loyalty Workflows	Description
LOY Approval Process	Approves point blocks and transactions.
LOY Cancel Transaction Process	Cancels a transaction.
LOY Cannot Copy Promotion Process	Displays an error message when promotion copying is disabled. Used in conjunction with the LOY Tier Promotion Copy Error Message runtime event action set.
LOY Deactivate Promotion Process	Inactivates a promotion and removes it from the cache.
LOY EAI Export Program	Sample workflow. Allows you to export program data from a third-party application into your Siebel 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.
LOY EAI Import Program	Sample workflow. Allows you to import program data from a third-party application into your Siebel 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.
LOY eMember - Checkout Process	Checks out order transactions in the Shopping Cart.
LOY Engine - Create Member Process TEST	Test process. Not used for normal operation.
LOY Engine - Create Transactions Process TEST	Creates the specified number of Accrual - Product transactions and randomly distributes them among the members.
LOY Engine - Process Batch	Invokes the Loyalty Processing Engine in batch mode in the Batch Server Component for processing.
LOY Engine - Process Expired Accruals	Processes an expired accrual on the realtime component.
LOY Engine - Process Object	Submits a component request to the realtime processing engine component to process the object.
LOY Engine - Process Promotion Bucket	Processes a bucket on the realtime component.
LOY Engine - Process Tier	Processes a tier on the realtime component.
LOY Engine - Process Transaction	Processes a transaction on the realtime component.
LOY Engine - Start Engine	Submits the required number of component requests to start the engine. The user must specify the number of processes and the processing threads per process.

Table 16.   Siebel Loyalty Workflows

Loyalty Workflows	Description
LOY Engine - Update Cache	Updates the cache used by the Loyalty Engine without restarting the engine.
LOY Member Enrollment Process	Processes new member enrollments.
LOY Modify Promotion Process	Inactivates the promotion and makes it available for editing.
LOY Optin Promotion Process	Used by the eLoyalty customer application. Allows users to enroll in a promotion.
LOY Optin Promotion Sub Process	Used by the eLoyalty customer application. Allows users to enroll in a promotion.
LOY Point Transfer Process	Transfers points between members.
LOY Return Points to Parent Point Block	When the Status of a point block associated with a promotion is set to Consumed, returns the remaining points in that point block to the parent point block from which the points were originally reserved. To process any monetary refunds due from the return, the system tracks the returned value at the parent point block level.
LOY Update Parent Point Block Reserved Points	When the Status of a point block associated with a promotion is set to Approved, exclusively reserves the points allocated for the promotion in the parent point block. This prevents unlimited points promotions from consuming pre-allocated points from the parent point block.
LOY Update Program Process	Used by the Loyalty Engine to refresh the program cache.
LOY User Registration Member Process	Creates and registers a new member.

LOY Processing Engine Business Service

The LOY Processing Engine Business Service includes the following methods:

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

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

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

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

Name	Value	Description
ObjectType	String	Type of object to update. If "Program", the loyalty program info will be updated. Else promotion info will be updated.
ProgramId	Row Id	Target loyalty program to update.
PromotionId	Row Id	Id of the Promotion to load.

Output Arguments
None

B Siebel Loyalty Technical Reference

This appendix documents the Loyalty Engine and error messages. It includes the following sections:

- *"Loyalty Server High Level Architecture" on page 257*
- *"Use of Server Keys by Siebel Loyalty" on page 259*
- *"Siebel Loyalty Server Components" on page 259*
- *"Siebel Loyalty Object Processing" on page 259*
- *"Siebel Loyalty and Siebel Remote" on page 262*

Loyalty Server High Level Architecture

The Loyalty Processing Engine can be deployed in two ways:

- Running in the background, continually processing eligible objects such as transactions, tiers.
- Running in a real-time mode, processing requests from clients on demand.

Figure 1 shows deployment of this server component in the background mode.
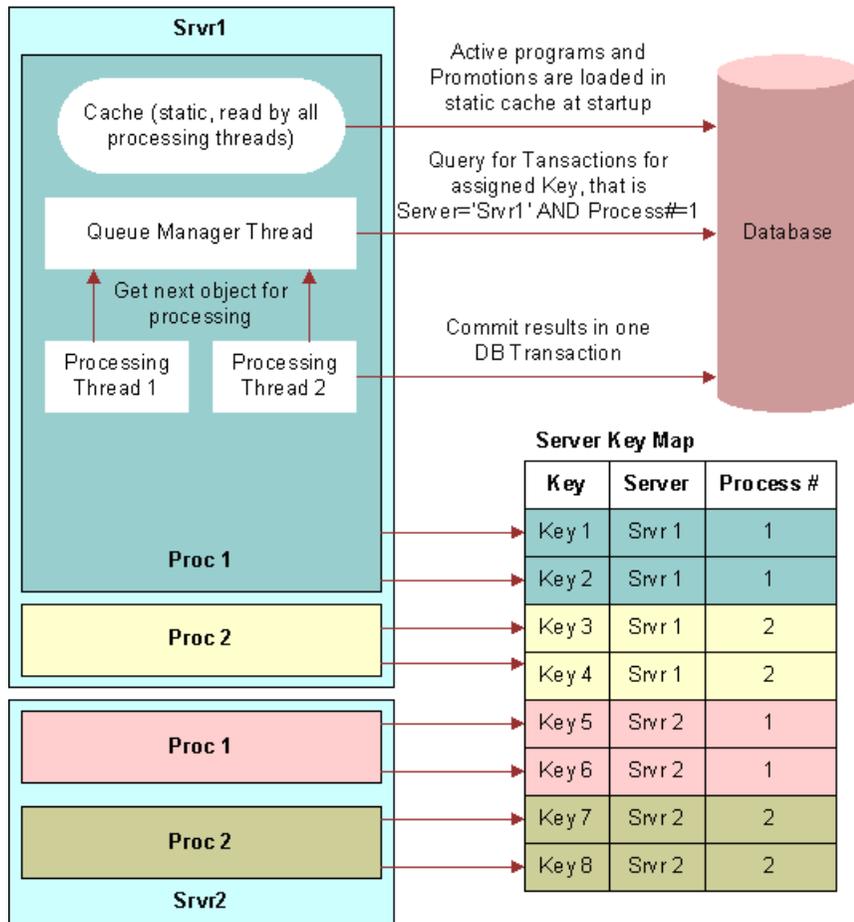
Figure 1.   Loyalty Server High-Level Architecture

The Loyalty Processing Engine has the following high-level architecture:

■ The batch component is a multi-threaded component that can be deployed to run multiple processes on multiple Siebel 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 master 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 for.

❑ Initializing the cache object.

❑ Initializing the queue of objects that should 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.

Use of Server Keys by Siebel Loyalty

For information about how the Loyalty Engine uses server keys, see "Setting Up Server Keys for Siebel Loyalty" on page 26.

Siebel Loyalty Server Components

For information about Loyalty Server Components, see "Setting Up Server Components for Siebel Loyalty" on page 29.

Siebel Loyalty Object Processing

Table 17 lists the object types processed by the loyalty engine.

The component parameter LOYEngineQueueObjects determines which primary business components of the business objects listed in the table are queried for processing.

It is not necessary for all objects to be processed at all times. For example, accrual expiration and tier processing may be done once a week or once a month and they need not be included for processing each day.

Table 17.   Object Types Processed by the Loyalty Engine

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.

Table 17. Object Types Processed by the Loyalty Engine

Type	Business Object and Primary Business Component	Description
Bucket	LOY Promotion Bucket Processor LOY Promotion Bucket	Processes the Promotion Bucket to check if it has met all the criteria of a complex promotion. Processed only against the promotion in question.
Accrual	LOY Accrual Expiration ProcessorLOY 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.

The primary business components listed in Table 17 have user properties that determine the criteria and sequence of processing. Table 18 describes the user properties of the LOY Engine Transaction business component, which illustrate the typical use of user properties by these business components.

Table 18.   User Properties of the LOY Engine Transaction Business Component

User Property Name	Description
LOY Queue Manager SearchSpec: Batch	The search spec used by the batch component to query for eligible records. In addition to this, the engine includes the criteria for the key (server and process #) that has been registered by the process.
LOY Queue Manager SortSpec: Batch	The sort spec to use to determine the order of processing for batch component.
LOY Queue Manager SearchSpec: Realtime	The search spec used by the real-time component to query for eligible records. In addition to this, the search also includes the row id of the record to be processed. This means that the record will also have to meet these criteria in order to be processed in real-time.
LOY Queue Manager SortSpec: Realtime	The sort spec 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 should 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 should 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 should be activated by the engine during processing. Note that these LOV Types are non translatable and the Language Independent Code should be the same as the Display Name. Customers should 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 applies to all the business components included in the LOY Engine Updater business object. The Log Changes property has been set to FALSE on these business components and should not be changed.

C 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 contains a description of recommendations and necessary parameter settings required to comply with German GAAP standards. It includes the following sections:

- *"Interfacing Siebel Loyalty with a General Ledger" on page 263*
- *"Activating the Audit Trail for the LOY Member Business Components" on page 263*
- *"Prohibiting deletion of members in Siebel Loyalty" on page 266*
- *"Enabling Sequential Numbering of Transactions" on page 266*
- *"Merging Members" on page 266*

Interfacing Siebel Loyalty with a General Ledger

In order to ensure a seamless reconciliation between the Loyalty module 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 must 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 is accomplished by posting the transactions to a dedicated account.

- For reconciliation purposes, Oracle recommends 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

See *Siebel Applications Administration Guide* for more information on activating Audit Trail.

Activating the LOY Member Business Component

In order to enable this business component, you must be logged into the system as an administrator with the appropriate rights to modify the Audit Trail configuration.

To activate 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

Activating the LOY Tier Business Component

In order to enable this business component, you must be logged into the system as an administrator with the appropriate rights to modify the Audit Trail configuration.

To activate 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

Activating the Channel Partner Business Component

In order to enable this business component, you must be logged into the system as an administrator with the appropriate rights to modify the Audit Trail configuration.

To activate 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

Activating the Personal Payment Profile Business Component

In order to enable this business component, you must be logged into the system as an administrator with the appropriate rights to modify the Audit Trail configuration.

To activate 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 may 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 above mentioned fields, it may be necessary to audit other fields added during
customization of the Siebel Loyalty product.

Prohibiting deletion of members in Siebel Loyalty

By default, you can delete Oracle's Siebel Loyalty members. In order to prohibit deletion of Loyalty
members, 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 Members

CAUTION: Oracle recommends 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 may not correctly add points.

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