**Loyalty Management Solution Requirement Document:**

XYZ Inc. wants to launch a loyalty program for its customers.

Following are the high-level requirements:

1. Loing/Registration
2. Earn Points by buying products

The user should be able to login to Web Portal and do following activities

1. User Registration and Login
2. User Should be able to see their profile details (demographics), type of card, card number (with only last 4 digits visible), points accumulated and a “Spend Analyzer”
3. Add entries
   1. Single Purchase entries – for the purchases done (one by one, say in grid)
   2. Bulk entries using excel – for the purchases using an excel sheet
4. Earn Points (calculated automatically) for the purchases done.

**Details**

1. General Details
   1. A loyalty program should support multiple cards (Platinum, Gold, Silver) and one of the cards should be marked as entry level card (by default its silver). Whenever a customer is created, it should be associated with the entry level card (e.g. Silver)
   2. Each card must have a point range (min to max) as defined in Table 1 below.
   3. The Company should be able to set loyalty points at the card level (e.g. 1pt per 100 euros spend for specific Product Category refer table 2 below.)
2. Earn Points
   1. All purchases must be entered in the order of Date of Purchase, and it should calculate points based on the purchase amount. Each purchase entry must store the card used, product purchased, purchase price and points earned (system calculated field).
   2. The system should store all purchases tagged to a user.
   3. Please note, the points earned on each purchase depend on the category of product purchased, card used for the purchase and price of product. If the card used is silver, points earned for same product may differ than if its gold card.
   4. Aggregate all the points at the card level and show it on user profile.
   5. The total points accumulated by the customer should be maintained and the customer should automatically be moved to the next level (if Silver, then move to Gold, if Gold then move to platinum etc.) based on the points accumulation.

Table 1.

|  |  |  |
| --- | --- | --- |
| Card Type | Min Points | Max Points |
| Silver | 0 | 1000 |
| Gold | 1001 | 2500 |
| Platinum | >2500 |  |

Table 2. (this may differ based on type of card e.g. Silver, Gold and Platinum etc.)

|  |  |  |  |
| --- | --- | --- | --- |
| Product Category | Minimum spend (currency) | Points Earned | Product |
| Tickets | 100 | 2 | Bus, Train, Flight, Movie |
| Groceries | 100 | 10 | Cooking Oil, Meat, Rice, Packed Food etc. |
| Electronics | 100 | 100 | Laptop, Smart Watch, Phone, etc. |