Admin User Guide – Loyalty

Getting Started

Overview

Accessing the Loyalty Console [#AccessingLoyaltyConsole]

The Loyalty microservice ("Loyalty") gives a business the ability to set up and schedule loyalty rewards for a period of time where a customer can use the loyalty reward programs to earn, track, and redeem rewards.

For a detailed overview of the **Loyalty** microservice, see the <u>Loyalty Microservice</u> Overview [https://developer.skava.com/microservices/loyalty/].

Service Glossary

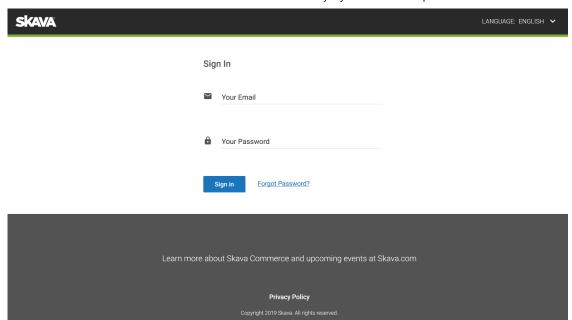
- Business Admin a role that manages business settings, creates and manages stores, and enables microservice(s) for a business.
- Customer a business consumer or buyer.
- Loyalty Group container for individual loyalties that are grouped logically based on an event or marketing campaign. Creation of a Loyalty Group is required and should be defined before a Loyalty can be created.
- Loyalty rewards presented to consumers or buyers in a client's Storefront and Apps.
- **Events** defines the event type (such as installing an App, referring a friend, liking the business on Facebook, etc.) which is configured and used within a loyalty.
- **Rewards** defines the reward type, which enables customers to earn rewards (i.e., points, stars, miles, etc.) based on their activities and redeem those rewards using the customer's bank of earned points.

Accessing the Loyalty Console

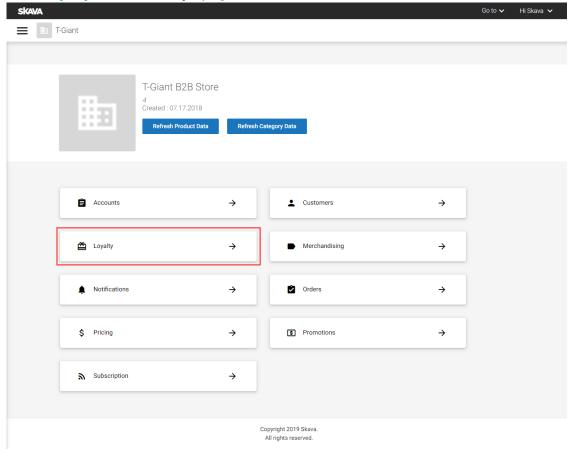
top [#top] | Configuring Search Parameters [#ConfiguringSearchParameters]

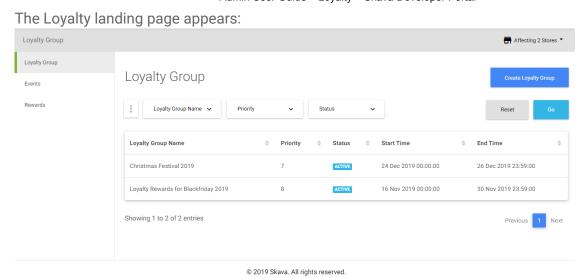
To access the Loyalty console,

1. Log in to the **Foundation** server for your **business** (URL provided by Skava).



2. Click **Loyalty** in the **StoreOps** page.





Configuring Search Parameters

Accessing the Loyalty Console [#AccessingLoyaltyConsole] | Loyalty Group Page [#LoyaltyGrpPage]

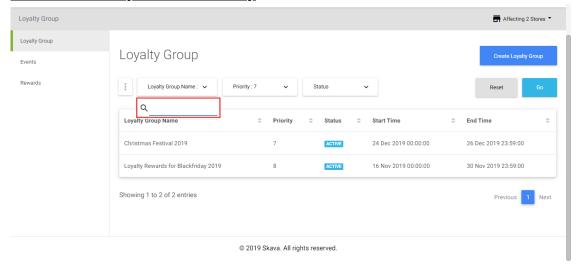
In the Loyalty page, you can search based on **Loyalty Group Name**, **Priority**, **Status**, and/or **Date**, modify the search fields as needed, and select the number of pre-defined rows per screen.

[] Search for Loyalty Group

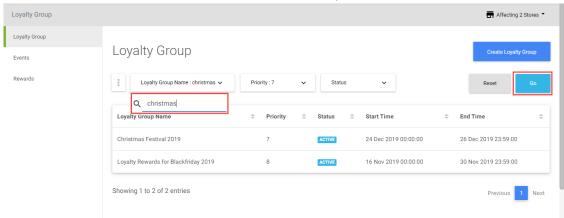
To search the loyalty group,

 Click the Loyalty Group Name, Priority, and/or Status drop-down list in the header to open an entry field to provide search criteria.

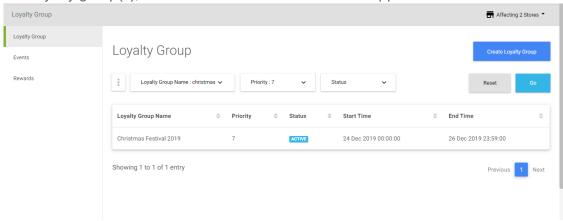
Note: For displaying a predefined number of loyalty groups per screen, see <u>Selecting Predefined Rows [#PredefinedRows]</u>.



2. Enter the desired search criteria in the search field, and then click Go:



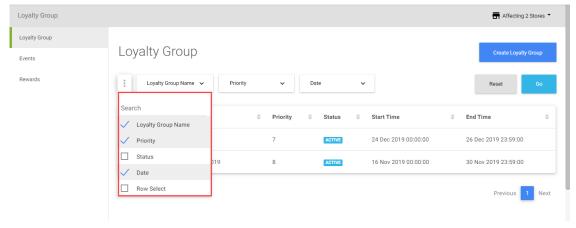
The loyalty group(s), which matches the search criteria appears:



Modify Searchable Fields

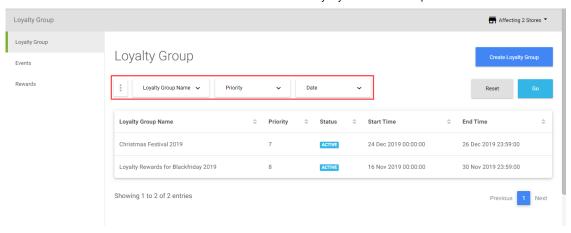
To modify the searchable fields,

- 1. Click the vertical ellipse available at the beginning of the search field.
- 2. Select or deselect the items to add or remove the searchable fields in the header:



3. Click the Go button.

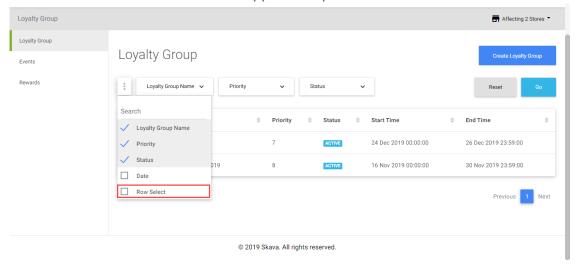
The selected searchable fields appear in the header:



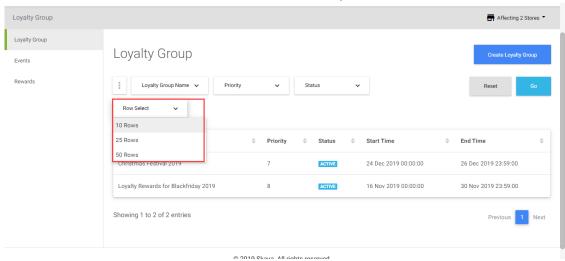
[] Selecting Predefined Rows

By default, 10 loyalty groups per screen will appear, but the number of loyalty groups per screen can be modified as follows:

- 1. Click the vertical ellipse available at the beginning of the search field.
- 2. Select Row Select. The Row Select appears as part of the search criteria.



3. Select 10 Rows, 25 Rows, or 50 Rows from the drop-down list.



4. Click the **Go** button. The selected rows of loyalty groups appear on the screen. **Note:** To reset the search field in the header, click the **Reset** button.

Loyalty Group Page

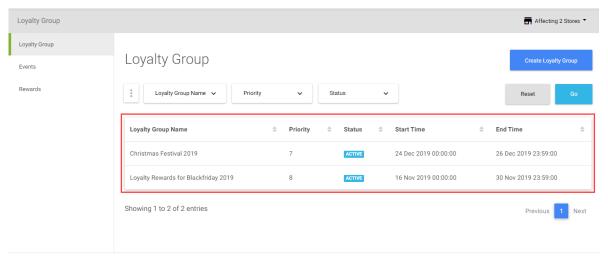
<u>Configuring Search Parameter [#ConfiguringSearchParameters] | Configuring Loyalty</u> Events [#_Toc486602887]

In the Loyalty Group page, you can:

- create a new Loyalty Group
- view or edit the existing Loyalty Groups
- search by loyalty group name, priority or status
- sort loyalty group name, priority, or status by ascending/descending order

Note:

- Pagination option appears in all screens that contain the loyalty group information.
- · To navigate to the next page, click Next.



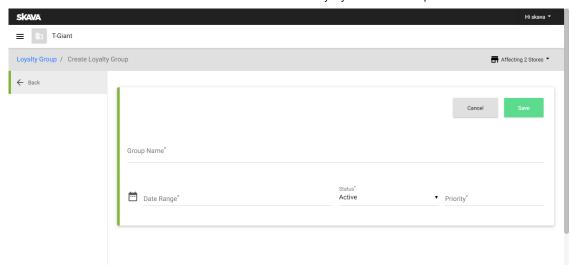
© 2019 Skava. All rights reserved

Creating a New Loyalty Group

A Loyalty Group enables you to organize multiple similar loyalties within the group.

To create a new loyalty group,

1. In the Loyalty home page, click the **Create Loyalty Group** button. The Create Loyalty Group page appears:



2. Enter/select the following required information:

Field	Description
Group Name	Enter a name that describes the loyalty group.
Date	Select the start date and time, and end date and time for the loyalty group.
Status	 When the loyalty group is within its time bounds and the status is made inactive, the loyalty group will not be picked up by the loyalty rule engine to execute. Select: Active to activate the loyalty group. The loyalty rule engine checks only active loyalty groups. In-Active to deactivate the loyalty group. Later, you can change the status to 'Active' if required.
Priority	Enter the priority number between 1 and 25 where 25 being the highest and 1 being the lowest in the priority order. The loyalty engine reads the active loyalty groups in it as per the priority order.

3. Click the **Save** button to save the newly created loyalty group. Once the group is created, in the **Loyalty Group** tab, you can view/edit the created loyalty group details and/or create a new loyalty within the group.

Creating a New Loyalty

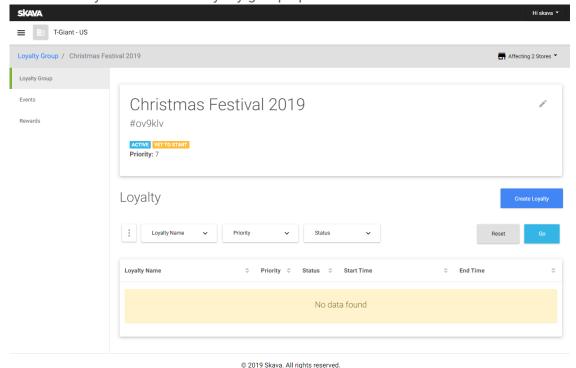
You can create one or more loyalties with a different set of event types, action types, and priorities for each loyalty.

The loyalty engine executes the loyalty group based on the priority, active status, and event type. The loyalty engine reads each active loyalty within the group, executes the loyalty event and actions set for each loyalty.

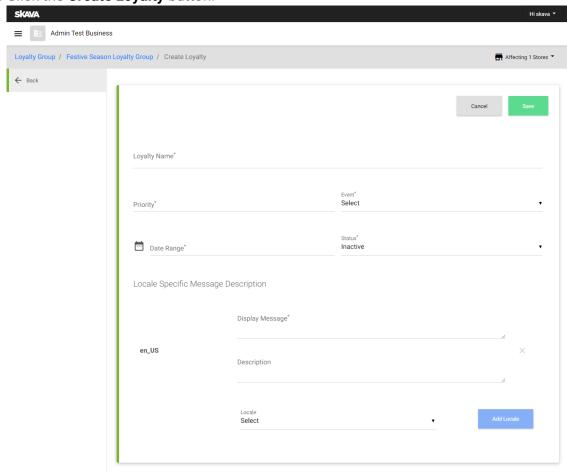
Note: Before creating a loyalty, you need to configure events and rewards. For more information, see <u>Configuring Loyalty Events [#_Toc486602887]</u> and <u>Configuring Loyalty Rewards [#_Toc486602891]</u>.

To create a new loyalty,

- 1. In the Loyalty's home page, click a particular loyalty group.
- 2. The summary of the created loyalty group opens:



3. Click the **Create Loyalty** button.



© 2019 Skava. All rights reserved.

4. In the **Create Loyalty** page, enter/select the required information:

Field	Description
Loyalty Name	Enter a name that describes the loyalty.
Priority	Enter the priority number between 1 and 25 where 25 being the highest and 1 being the lowest in the priority order. The loyalty engine reads the active loyalty groups and active loyalty in it as per the priority order.
Event	The configured loyalty event appears here. Select the required event type. For information on how to configure event types, see Configuring Loyalty Event Types [#_Toc486602887].

Field	Description
Date Range	Select the start date and time, and end date and time for the loyalty. The loyalty offer will be applicable only on the selected date and time, otherwise, the loyalty expires. You will be able to select the date for a loyalty that falls within the loyalty group duration. Note: The loyalty created within the loyalty group is bound to be within this start and end dates.
Status	When the loyalty is within its time bounds and the status is made inactive, the loyalty will not be picked up by the loyalty engine to execute. Select: • Active to activate the loyalty. The loyalty engine considers only active loyalty groups and loyalty. • In-Active to deactivate the loyalty. Later, you can change the status to 'Active' if required.
Display Message	Enter the locale-specific display message.
Description	Enter the locale-specific description.
Add Locale	Click this button to add multiple locales.

5. Click the **Save** button to save the loyalty to the loyalty group.

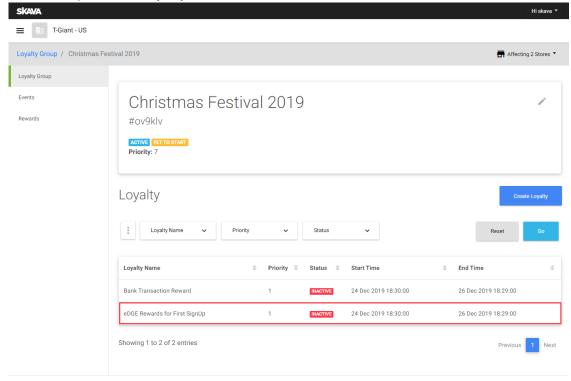
The Summary page will be displayed where you can view/edit the loyalty details.

Editing a Loyalty

To edit a loyalty, perform the following steps:

1. In the Loyalty Group page, click of a particular loyalty group. You can see the list of loyalties within the group.

2. Click on a particular loyalty.



© 2019 Skava, All rights reserved

3. Click:

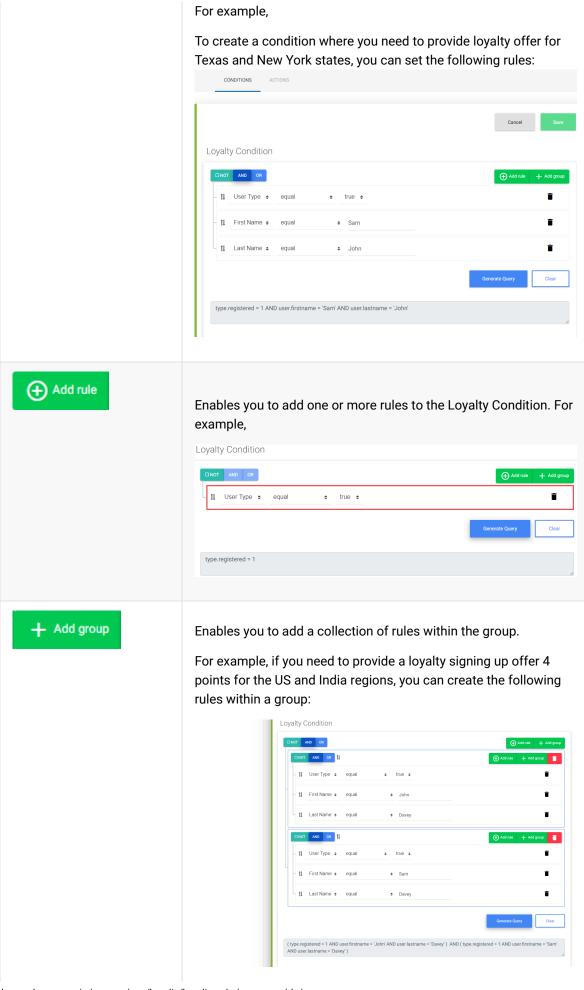
- the Edit icon to edit the loyalty details.
- the **CONDITIONS** tab to create conditions; see <u>Configuring Conditions to the Loyalty [#_Toc486602883]</u> for more information.
- the ACTIONS tab to set actions to the loyalty; see <u>Creating Actions to the Loyalty [#_Toc486602884]</u> for more information.

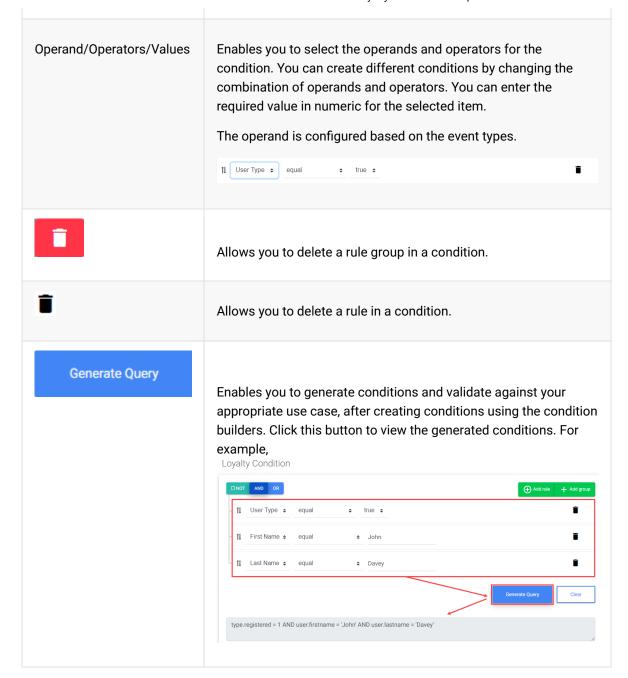
Onfiguring Conditions to the Loyalty

You can add one or more rules or group of rules to a loyalty. By default, a row will be shown to add a rule. After setting the conditions to the loyalty, you may choose to click on **Generate Query** to check if your condition is appropriate to your use case.

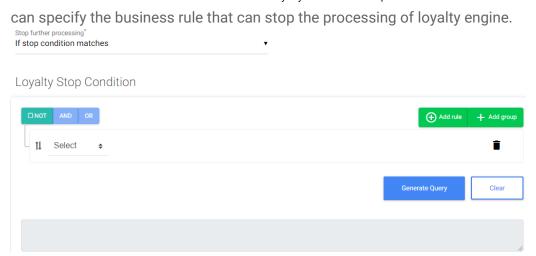
- 1. In the **CONDITIONS** tab, click the **Edit** icon.
- 2. Set rules as required. The following table describes options to create rules or group of rules to the loyalty:

Options in Condition	Description
NOT AND OR	Enables you to set logical operators such as NOT , AND , and OR . These operators apply the rules that are a direct descendant in the condition builder.





- 3. Select any one of the following, which allows you to stop further processing of the succeeding loyalty groups:
 - Never Irrespective of whether condition matches or not in the current loyalty group, continue to execute the succeeding loyalty groups. By default, this option will be selected.
 - Always Irrespective of whether condition matches or not in the current loyalty group, loyalty engine stops executing the succeeding loyalty group.
 - **If condition matches** When the current loyalty group's condition matches, loyalty engine stops executing the succeeding loyalty group.
 - If stop condition matches Enables you to define the stop condition. The loyalty engine stops executing when the Stop condition matches. The user



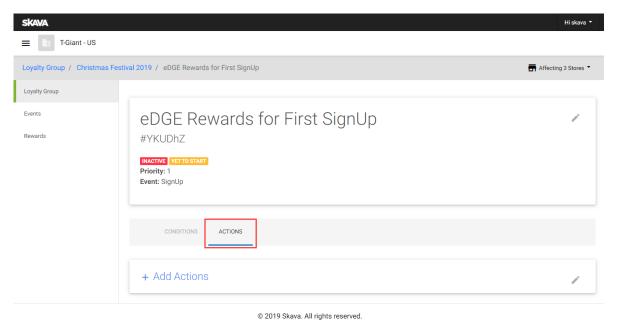
Note: For details, see Creating Conditions to the Loyalty [#_Toc486602883].

4. Click the **Save** button to save the conditions to the loyalty.

[] Creating Actions to the Loyalty

Overview

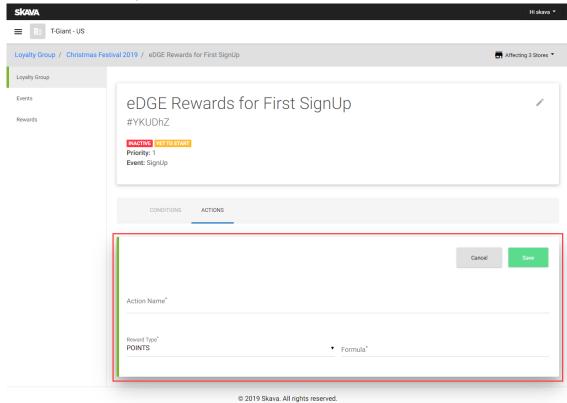
After creating a new loyalty and creating conditions to it, you need to specify what needs to be done when the condition matches. This is set using the actions. You can also create multiple different actions based on the action condition and assign different loyalty values to each action by specifying the required formula. The actions will vary according to the event and the action selected for a loyalty.



Creating an Action

To create an action,

In the ACTIONS tab, click Add Actions.



- 2. Enter an action name, which describes the action.
- 3. Select the reward type (that is, a currency type).
- 4. Enter the required formula; for example, \${customEvent.productPrice}*50

Note: In Formula, based on the configured event type properties, suggestions will show for the data types such as integer, long, and/or double. You can select the required data type and enter the required numeric values for calculating loyalty points for the event.

5. Click the **Save** button to create an action.

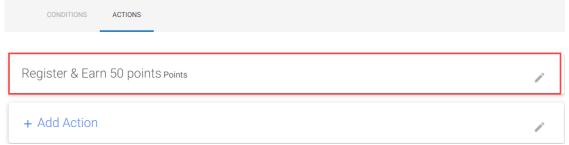
Note: You can create multiple actions to a loyalty. The loyalty will be executed based on the created date.

Viewing or Editing an Action

The created actions will be displayed as an accordion under the **Actions** tab.

To view or edit an action,

Click on a particular action or the Edit icon. For example,



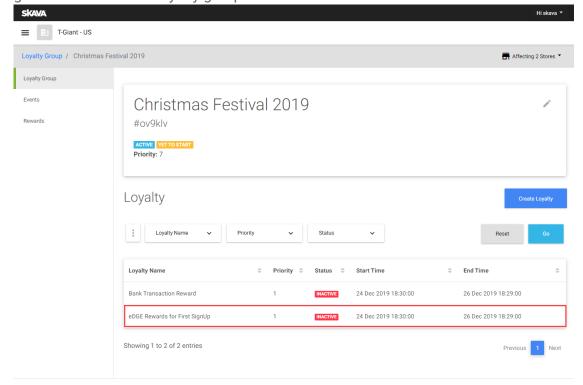
- 2. Make necessary changes in the action name, reward type, and/or formula.
- 3. Click the **Save** button. The updated action is displayed under the **Actions** tab. **Note:** To discard the changes, click **Cancel**.

[] Viewing/Editing a Loyalty Group

In the Loyalty Group page, you can view or edit a particular loyalty group.

To view/edit a loyalty group,

1. In the Loyalty Group page, click on a particular loyalty group. The following page appears where you can view the list of loyalties available within the group and general details of the loyalty group.

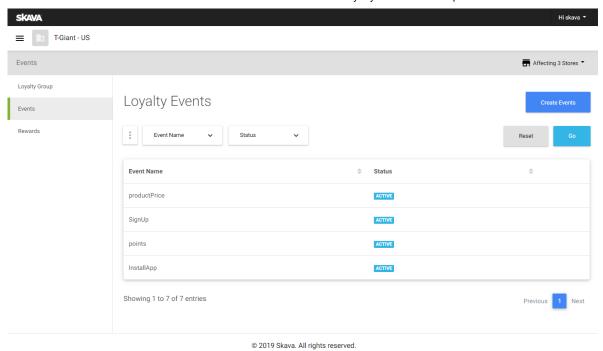


- © 2019 Skava. All rights reserved.
- 2. Click the **Edit** icon to make necessary changes if required.
- 3. Click the Save button.

Configuring Loyalty Events

<u>Loyalty Group Page [#LoyaltyGrpPage] | Configuring Loyalty Rewards [#_Toc486602891]</u>

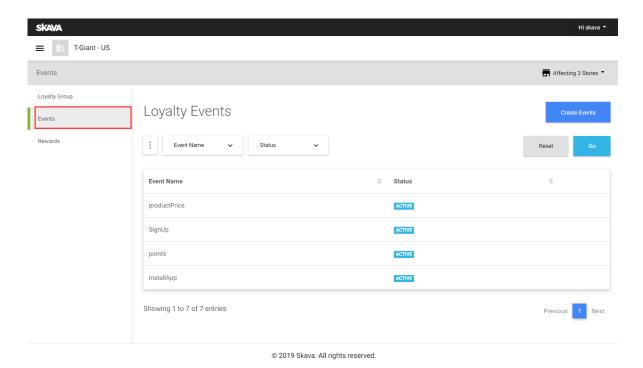
Before creating a loyalty group and loyalty, you need to configure events. In the Loyalty Events page, you can create an event and assign properties to it. Once created, the event name will be displayed under Event Type while creating a new loyalty.



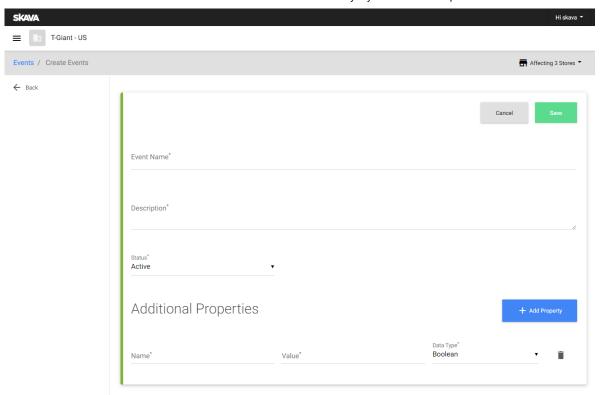
[] Creating a New Event

To create a new event,

1. Click **Events** in the left panel. The Loyalty Events page appears:

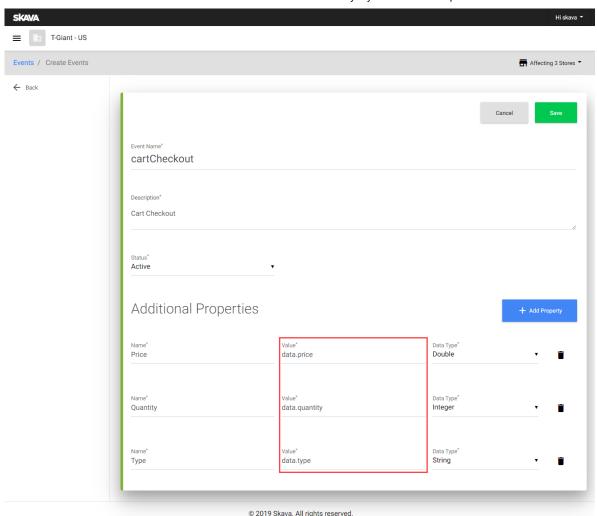


2. Click the **Create Events** button. The Create Events page appears:



© 2019 Skava. All rights reserved.

- 3. Enter a name for the event.
- 4. Enter the description. This name will be displayed in the **Event** drop-down list while creating a loyalty.
- 5. In the Additional Properties section, click the **Add Property** button. A row will be added. You can also add multiple properties to an event.
- 6. Enter a key and value (JSON path). For example,



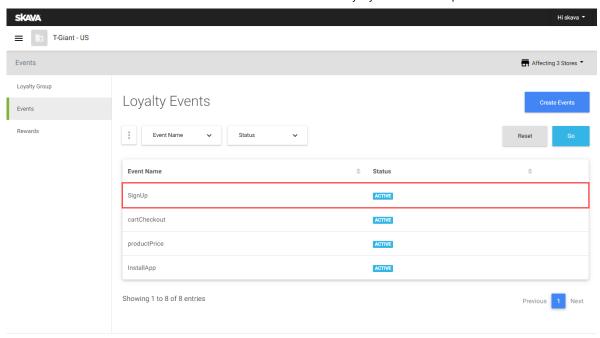
Note: In Value, enter a valid JSON of the requested data. For example,

- **Object:** {"data": {"price":100, "quantity":5, "type": "Mobile"}}
- Valid Path: For obtaining price, enter data.price; for obtaining quantity, enter data.quantity
- 7. Select a data type.
- 8. Click the **Save** button. The added event appears under the Loyalty Events page.

[] Viewing/Editing a Loyalty Event

To view or edit an event,

- 1. Click **Events** in the left panel.
- 2. In the Loyalty Events page, click a particular event; for example,



© 2019 Skava. All rights reserved.

- 3. Make necessary changes.
- 4. Click the **Save** button. The updated event appears under the Loyalty Events page.

Configuring Loyalty Rewards

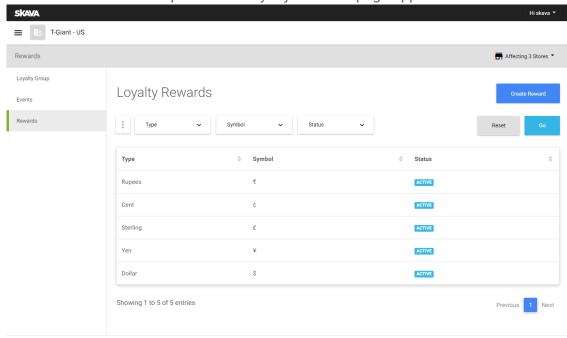
Configuring Loyalty Events [#_Toc486602887] | Revision History [#RevisionHistory]

Before creating a loyalty group and loyalty, you need to configure rewards. In the Loyalty Rewards page, you can create a new loyalty reward. The configured loyalty rewards (for example, Type: Dollar, Symbol: \$) appear under **Reward Type** while configuring actions to the loyalty.

[] Creating a New Reward

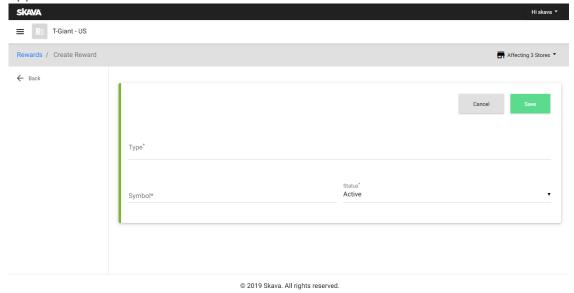
To create a new reward,

1. Click **Rewards** in the left panel. The Loyalty Rewards page appears:



© 2019 Skava. All rights reserved.

Click the Create Reward button to create a new reward. The Rewards screen appears:

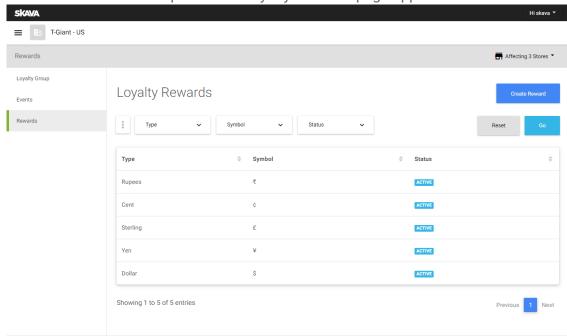


- 3. In Type, enter the currency name. For example, Dollar
- 4. In Symbol, enter the currency symbol. For example, \$
- 5. Click the **Save** button. The added reward appears under the Loyalty Rewards page.

[] Viewing/Editing a Loyalty Reward

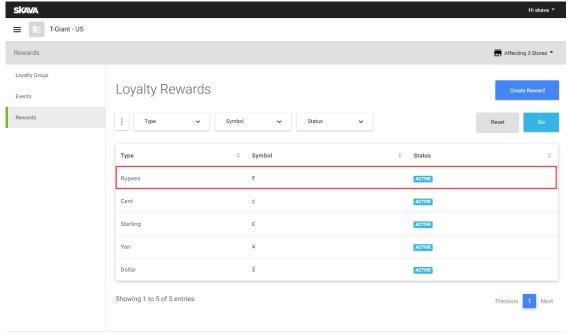
To view or edit a reward.

1. Click **Rewards** in the left panel. The Loyalty Rewards page appears:



© 2019 Skava. All rights reserved.

2. In the Loyalty Rewards page, click a particular reward.



© 2019 Skava. All rights reserved.

- 3. Make the necessary changes.
- 4. Click the **Save** button to save the changes to the reward details.

Revision History

2020-10-21 | HM - Minor copyedit.

2020-03-28 | AM - Minor copyedit

2019-10-29 | JP - Page created and content uploaded.

© 2020 Skava, Inc. All rights reserved.