



# SALESFORCE-LOYALTY- MANAGEMENT<sup>Q&As</sup>

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## QUESTION 1

A new segment in Customer Data Platform (CDP) will be used for sending notification emails to members with the following requirements:

-

The mail is sent on the first day of the month to the members that will have their membership expire at the end of the same month, starting from the 1st of April to 30th of June

-

member's expiry-date are standardized to the last day of the month.

Which two configuration options below should be used for the new segment to fulfill this segmentation requirement?

- A. In "Segment Property", set "Publish Schedule" to "Don't Refresh".
- B. In the Segmentation Rule, Use "LoyaltyProgramMember" as the Direct object, > Operator: "This Month" for the "Membership Expiry Date" attribute.
- C. In the Segmentation Rule, Use "LoyaltyProgramMember" as the Direct object, > Operator: "Next Number of days" = 30 for the "Membership Expiry Date" attribute.
- D. In "Segment Property," set "Publish Schedule" to "24 hours" and the appropriate "Start Date" and "End Date"

Correct Answer: BD

For this segmentation requirement, the key is to identify members whose membership will expire at the end of the current month and to ensure the segment is refreshed daily within the specified date range. Option B is correct because using

"This Month" for the "Membership Expiry Date" attribute will accurately segment members whose memberships expire at the end of the current month.

Option D is also correct because setting the "Publish Schedule" to "24 hours" ensures the segment is refreshed daily, capturing new members meeting the criteria as the month progresses. The "Start Date" and "End Date" should be set from

the 1st of April to 30th of June to match the requirement. Option A is not suitable because "Don't Refresh" would prevent the segment from updating daily, which is necessary to capture new members as their membership expiry dates become

relevant.

Option C using "Next Number of days" = 30 might incorrectly include members whose memberships expire in the next 30 days from the current date, not specifically at the end of the current month.

## QUESTION 2

A loyalty Program would like to set up a new process where a push notification or email will be sent to the client immediately after a voucher is added to their member account within Salesforce Marketing Cloud.



The notification message will require the "first name" and the "membership number" to personalize the message and, a custom object named

"voucherissued" with the necessary data attributes.

Which option for the entry event should be selected as the preferred implementation approach that can meet the requirements with the least amount of development effort?

A. *data-extension that receives the new voucher-disbursement records that contains the Member's "first name" and the "membership number" as the attributes.*

B. *Event Source : "Salesforce Data", > Source object : "VoucherDefintion" custom object , > Entry-Data: All attributes from the "VoucherDefintion" objects*

C. *Event Source : "Salesforce Data", > Source object: "Voucher", > Entry-Data: Attributes from the "Voucher", "Contact" and "LoyaltyProgramMember" objects.*

D. *Event Source : "Salesforce Data", > Source object : "VoucherDefintion" custom object , > Entry-Data: All attributes from the "VoucherDefintion" objects*

A. Option A

B. Option B

C. Option C

D. Option D

Correct Answer: C

For the scenario described, where a loyalty program wants to send an immediate notification after a voucher is added to a member's account, the entry event in Salesforce Marketing Cloud needs to trigger off of the creation of a record in Salesforce that contains the necessary data attributes for personalization. Option C is the most suitable choice because



it specifies an entry event based on the "Voucher," "Contact," and "LoyaltyProgramMember" objects. This approach aligns with the requirements because it directly utilizes the "first name" from the Contact object and the "membership number" from the LoyaltyProgramMember object, which are necessary for personalizing the notification message. Moreover, Option C would likely require the least amount of development effort because it leverages existing Salesforce data and related objects without the need for additional configuration or data extensions. In contrast, other options would require the setup of a data extension or custom objects that may not be directly tied to the triggering event, thereby increasing the complexity and development effort. In Salesforce Marketing Cloud, Journey Builder is the tool that would be used to create this customer journey. It allows for the configuration of entry events based on data changes in Salesforce, such as the addition of a voucher to a member's account. The real-time nature of this trigger is essential for the immediate notification requirement. According to Salesforce's official documentation, using Salesforce data as the entry source for a journey allows for real-time messaging based on record creation or updates. This means that as soon as a voucher record is created or updated in Salesforce, the entry event can trigger and begin the journey, which will send the personalized notification to the member. In practice, setting up this entry event in Journey Builder would involve specifying the criteria for the trigger (in this case, the creation of a voucher) and mapping the necessary data fields for personalization. This is consistent with Salesforce's best practices for creating personalized, real-time customer engagements through Journey Builder. Salesforce's documentation on Journey Builder and real-time event triggers provides further details on how to configure these types of journeys and can be referred to for step-by-step guidance and the latest feature updates.

### QUESTION 3

A Loyalty Program Manager has proposed a new promotion with the following redemption requirements on their non-qualifying points for the two respective tiers.

1.

for Gold-tier members, a single non-qualifying point is equal to \$2 if the total purchase value is \$200 or more.

2.

for Gold-tier members, a single non-qualifying point is equal to \$1 if the total purchase value is less than \$200.

3.

for Gold-tier members, a single non-qualifying point is equal to \$1, irrespective of the total value of the purchase.

Considering the above requirements, which three redemption rule options should be selected for the proposed promotion?

A. "Blue" tier member with any transaction amount, then "Outcome": non-qualifying point deduction = transaction amount.

B. "Blue" tier member with any transaction amount is  $\geq$  \$200, then "Outcome": tier-qualifying multiplier = 2

D. "Gold" tier member with the transaction amount is  $\geq$  \$200, then "Outcome": non-qualifying point deduction = transaction amount / 2.

E. "Gold" tier member with the transaction amount is  $\geq$  \$200, then "Outcome": non-qualifying point deduction = transaction amount.

Correct Answer: ADE



#### QUESTION 4

A Consultant needs to configure the Loyalty tier groups for a Loyalty Program with the following specifications:

Qualifying period is reset once a year on the 31st of March.

The member-tier is not extended upon expiration.

Which two settings within the Loyalty tier groups configuration should the Consultant configure to meet the required specifications?

- A. Extend Expiration = member enrollment anniversary
- B. Tier-model = fixed
- C. Tier-model = anniversary
- D. Extend Expiration = no extension

Correct Answer: BD

To meet the specifications of resetting the qualifying period once a year on the 31st of March and not extending the member tier upon expiration, the Consultant should configure the Loyalty tier groups with a Tier-model = fixed and Extend Expiration = no extension. The fixed tier model ensures that the qualifying period and tier criteria remain constant over time, while the 'no extension' setting ensures that member tiers do not automatically extend beyond their expiration date. This configuration aligns with the requirement for a clear, annual reset and non-extension of tier status, ensuring a consistent and predictable tier progression structure within the Loyalty Program.

#### QUESTION 5

The Loyalty Administrator for Northern Trail Outfitters (NTO) insider program defines tier groups- Status Tier Group with a Fixed model and period of one year.

The three tiers are defined =Silver (base), Golden (next tier), and Platinum (the highest tier)

Extend Expiration for this tier group is Qualifying Points Reset Date.

A member joins NTO insider in the Silver tier and, after a year of engagement, gets upgraded to the Gold tier on March 16, 2023.

Which date would be the new Expiry date of this member after the tier is upgraded to Gold?

- A. December 31, 2024
- B. March 31, 2024
- C. December 31, 2023
- D. March 16, 2020.

Correct Answer: B

The new expiry date for the member after being upgraded to the Gold tier would be March 31, 2024. In Salesforce Loyalty Management, when a member is upgraded to a new tier, the expiry date is set based on the tier's fixed model and period. Since the member was upgraded on March 16, 2023, and the period is one year, the new expiry date aligns



with the end of the month following the one-year anniversary of the upgrade, which is March 31, 2024.

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