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QUESTION 1

Which set of features should a Consultant check before setting up expanded partner management?

A. Growth license, PostPaid Billing Type, Partner Ledgers, Partner Conversion Factor for Currencies

B. Growth license, Prepaid Billing Type, Partner Transactions, Partner Conversion Factor O for Currencies

C. Advanced license, PostPaid Billing Type, Partner Ledgers, Partner Conversion Factor for Currencies

D. Advanced license, Partner Ledgers, Partner Transactions, Billing Type

Correct Answer: C

Before setting up expanded partner management in Salesforce Loyalty Management, a Consultant should verify the following features are available:

Option C:An "Advanced" license, which typically provides a broader set of functionalities and capabilities within Salesforce applications, including Loyalty Management.

"PostPaid Billing Type," indicating the billing arrangement with partners, which is relevant for managing financial transactions within the Loyalty Program. "Partner Ledgers," which are necessary for tracking financial transactions and point

exchanges with partners.

"Partner Conversion Factor for Currencies," enabling the management of loyalty points and currency conversion across different geographies and partner locations. These features collectively support the expanded management of partner

relationships within the Loyalty Program, including financial transactions, point conversions, and international operations.

Reference: Salesforce Loyalty Management documentation on partner management provides insights into the features and configurations required for setting up and managing complex partner relationships within Loyalty Programs.

QUESTION 2

Which two actions should an Administrator execute when a tier is changed manually?

A. Process Member Benefit Action

B. Create a scheduled job to perform tier change.

C. Assign Member Tier Benefits Action

D. Process Transaction Journals batch job

Correct Answer: AC

When a tier is changed manually in Salesforce Loyalty Management, an Administrator should execute the following two actions:

Process Member Benefit Action (A):This action ensures that any benefits associated with the new tier are correctly

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processed and applied to the member. It\\'s essential for maintaining the integrity of the loyalty program and ensuring members

receive the appropriate benefits for their new tier. Assign Member Tier Benefits Action (C):This action assigns the benefits specific to the newly assigned tier to the member. It\\'s crucial for updating the member\\'s benefits to align with their new

tier status, ensuring they receive all entitlements associated with their new level.

Creating a scheduled job to perform the tier change (option B) and processing Transaction Journals batch job (option D) are not directly related to the manual tier change process. The focus should be on ensuring that member benefits are

correctly assigned and processed in response to the tier change.

Salesforce documentation on Loyalty Management would provide detailed guidelines on managing tier changes, including the actions required to ensure member benefits are correctly updated.

QUESTION 3

When implementing Analytics for Loyalty, what are the three steps to turn on analytics and dashboards?

A. Assign Analytics for Loyalty User Permissions.

B. Create standard Salesforce reports and dashboard

C. Schedule dataflow for the analytics

D. Create an App using existing templates

E. Install CRM Analytics package

Correct Answer: ACE

To turn on analytics and dashboards for Loyalty, the three essential steps are:

Assign Analytics for Loyalty User Permissions (A):This step ensures that users who need to access Loyalty Analytics have the necessary permissions to view and interact with the analytics and dashboards.

Schedule dataflow for the analytics (C):Dataflow is the process by which data moves from Salesforce objects into Analytics datasets. Scheduling dataflow is crucial for ensuring that the analytics and dashboards have up-to-date information

from the Loyalty Management system.

Install CRM Analytics package (E):This involves adding the CRM Analytics package to your Salesforce org, which provides the tools and capabilities needed to create and customize analytics and dashboards for Loyalty Management. Option

B (Create standard Salesforce reports and dashboard) and Option D (Create an App using existing templates) are valuable for general reporting and app development within Salesforce but are not specifically tied to the initial steps for

enabling Loyalty Analytics and dashboards.

Salesforce documentation on Loyalty Management and CRM Analytics would detail the process of enabling analytics for Loyalty, including the setup of user permissions, dataflow scheduling, and the installation of necessary packages to

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utilize analytics and dashboards effectively.

QUESTION 4

Universal container launched a Loyalty Program. The salesforce Administrator to..... to create a private portal for the Loyalty Program.

What is the last step the Salesforce Administrator must complete?

A. Associate the Loyalty Program with the site

B. Activate the Experience Cloud site

C. Add the relevant Experience Cloud components to the pages

D. Create the Experience Cloud site

Correct Answer: B

The last step the Salesforce Administrator must complete to create a private portal for the Loyalty Program using Experience Cloud is to activate the Experience Cloud site. Activation is the final step that makes the site accessible to users. Once the site is activated, members can access the portal, where they can engage with the Loyalty Program, view their points and tiers, and take advantage of program benefits. Activation is crucial as it transitions the site from a development or staging phase to a live environment.

QUESTION 5

What are the three essential steps to establish a Loyalty promotion with Salesforce CDP and Marketing Cloud? Select three A. Transmit Loyalty Promotion Segments to Marketing Cloud

B. Automatically Generate a New Individual Relationship

C. Activate and Publish the Segment

D. Enable Connector Settings on all the Loyalty Objects E. Enable Service Connector for Promotion Escalations.

Correct Answer: ACD

To establish a Loyalty promotion with Salesforce CDP (Customer Data Platform) and Marketing Cloud, the three essential steps are:

Transmit Loyalty Promotion Segments to Marketing Cloud (A):This step involves sharing segmented data from Salesforce CDP to Marketing Cloud, enabling targeted marketing campaigns based on loyalty promotion criteria. Activate and

Publish the Segment (C):Once the segments are defined and populated with the relevant Loyalty Program Members, the segment needs to be activated and published to be used in campaigns and promotions within Marketing Cloud.

Enable Connector Settings on all the Loyalty Objects (D):This involves configuring the integration between Salesforce CDP, Loyalty Management, and Marketing Cloud by enabling the necessary connector settings, ensuring seamless data

flow and communication between these platforms for the promotion. Option B (Automatically Generate a New Individual

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Relationship) and E (Enable Service Connector for Promotion Escalations) are not directly related to the essential steps

for establishing a loyalty promotion with Salesforce CDP and Marketing Cloud.

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