



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

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## QUESTION 1

A Consultant needs to design a new tier-upgrade process for a new Loyalty Program. The custom object to store the qualified members and a batch job is identified for this process.

Which two components should the Consultant select for this process?

- A. A flow to perform both tier-upgrade rule and tier-upgrade orchestration process
- B. A flow to schedule and process the custom object's pending records and another flow to perform tier-upgrade orchestration process
- C. A flow to perform the tier-upgrade rule and another flow to perform the tier-upgrade orchestration process
- D. A data-processing-engine (DPE) to identify the qualified members

Correct Answer: CD

For designing a new tier-upgrade process in a Loyalty Program, the Consultant should select:

A flow to perform the tier-upgrade rule and another flow to perform the tier- upgrade orchestration process (C):This approach allows for the separation of concerns, where one flow is responsible for evaluating whether members meet the

criteria for a tier upgrade, and another flow is responsible for the actual process of upgrading the member's tier. This modular design improves maintainability and scalability.

A data-processing-engine (DPE) to identify the qualified members (D):The DPE can efficiently process large sets of member data to identify those who qualify for a tier upgrade based on the program's criteria. This component is crucial for

automating the tier-upgrade process at scale, especially in programs with a significant number of members.

Option A combines both processes into a single flow, which could become complex and harder to maintain. Option B suggests using a single flow for scheduling and processing, which might not offer the required flexibility and efficiency for

handling complex tier- upgrade criteria and orchestration.

Salesforce documentation on Loyalty Management provides guidelines on leveraging Flow and DPE for automating and orchestrating various loyalty program processes, including tier upgrades.

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## QUESTION 2

A sports clothing and accessories retailer is setting up a new Loyalty program. The company wants an effective way to create urgency in its Loyalty program members to return to purchase and redeem their points within a specified period. The entire points balance expires if a member's last activity, including any purchase or points redemption, reaches 18 months.

What steps should a Loyalty Consultant follow to meet the retailer's requirement when implementing the new Loyalty program?

- A. Set up a Non-Qualifying Points currency and apply the expiration model 'Fixed Model'



- B. Set up a Qualifying Points currency and apply the expiration model '\\Activity Model\\'
- C. Set up a Non-Qualifying Points currency, apply the expiration model '\\Activity Model\\'
- D. Set up a Qualifying Points currency and apply the expiration model '\\Fixed Model\\'

Correct Answer: C

To create urgency for Loyalty program members to return and redeem their points within a specified period, where the entire points balance expires if a member's last activity reaches 18 months, the Loyalty Consultant should:

Set up a Non-Qualifying Points currency, apply the expiration model '\\Activity Model\\' (C): This setup allows for the expiration of Non-Qualifying Points based on member activity, specifically if there is no purchase or points redemption activity

within an 18-month period. The Activity Model is used to track the last activity date and trigger expiration based on this inactivity period. Setting up a Non-Qualifying Points currency with a '\\Fixed Model\\' expiration (option A), a Qualifying Points

currency with either '\\Activity Model\\' (option B) or '\\Fixed Model\\' expiration (option D), would not meet the retailer's requirement for creating urgency based on the last activity.

Salesforce documentation on Loyalty Management would provide guidance on configuring expiration models for loyalty currencies, ensuring that program objectives, such as encouraging regular member engagement, are achieved.

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### QUESTION 3

What is the correct implementation approach for an Administrator to target a promotion only for specific products?

- A. Create a custom list on the promotion
- B. Map products to promotion through an out-of-the-box Related List
- C. Create product attributes in Promotion Setup
- D. Add promotion to the lookup field on the product

Correct Answer: B

To target a promotion only for specific products in a Loyalty Program, the correct implementation approach is to Map products to promotion through an out-of-the-box Related List (B). This approach leverages standard Salesforce functionality, allowing administrators to associate specific products with a promotion directly within the promotion's record. This direct mapping ensures clarity and ease of administration, enabling targeted promotional activities that are specific to certain products. Option A (Create a custom list on the promotion), Option C (Create product attributes in Promotion Setup), and Option D (Add promotion to the lookup field on the product) are not standard Salesforce Loyalty Management functionalities for associating products with promotions and may require custom development or configuration that is more complex and less maintainable than using out-of-the-box related lists. Salesforce documentation on Loyalty Management would detail the process for setting up and managing promotions, including how to associate promotions with specific products to achieve targeted marketing objectives within the Loyalty Program.

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### QUESTION 4

A new promotion named "Summer Sales" within the Loyalty Program will introduce program members to the



promotional campaign and send email communication to the qualified members via Marketing Cloud.

Which the customer Data Platform (CDP) package available, which two options will need to be performed within the org to achieve the required action with minimal configuration effort in mind?

- A. "Add Segments" within the "Promotion Segments" section of the "Summer Sales" Promotion
- B. Add the Segmented "Loyalty program members" to a new "Campaigns".
- C. Create a custom report using "Salesforce reports".
- D. Create a new segment within CDP.

Correct Answer: AD

To introduce program members to the "Summer Sales" promotional campaign and send email communication via Marketing Cloud with minimal configuration effort, the required actions within the org would be:

"Add Segments" within the "Promotion Segments" section of the "Summer Sales" Promotion (A): This action allows for the direct association of specific member segments to the promotion, enabling targeted communication and engagement

with minimal effort.

Create a new segment within CDP (D): By creating a new segment within the Customer Data Platform (CDP), you can easily define and manage the group of loyalty program members who qualify for the "Summer Sales" promotion.

This segment can then be used in conjunction with Marketing Cloud for targeted email campaigns.

Options B and C, involving adding segmented loyalty program members to new campaigns and creating custom reports, are not as directly related to the goal of minimal configuration effort for introducing members to the promotion and

communicating via Marketing Cloud. Salesforce documentation on Loyalty Management, CDP, and Marketing Cloud integration would provide insights into efficiently setting up promotions and communicating with targeted segments of loyalty

program members.

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## QUESTION 5

Cloud Kicks has tasked its Loyalty Consultant with setting up its new Loyalty Management platform. The business requirement is to create personalized experiences across its customer journey.

Which solution should the Loyalty Consultant utilize to create personalized customer experiences?

- A. Salesforce Sales Cloud
- B. Salesforce Marketing Cloud
- C. Salesforce Slack
- D. Salesforce Order Management System

Correct Answer: B



To create personalized experiences across Cloud Kicks\\' customer journey, the Loyalty Consultant should utilizeSalesforce Marketing Cloud (B). Marketing Cloud provides a comprehensive suite of marketing tools designed to create personalized customer journeys, segment audiences, and deliver targeted content and communications. Leveraging Marketing Cloud\\'s capabilities in conjunction with Loyalty Management allows for the creation of highly personalized and engaging experiences for loyalty program members, enhancing customer satisfaction and loyalty.

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