SALESFORCE-LOYALTY-MANAGEMENT$^{Q\&As}$

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QUESTION 1

Northern trail Outfitters (NTO) wants to offer 10% discount on top of the annual summer sale for its Loyalty program customers.

Which two steps must a Consultant take in Loyalty Management to set up this promotion?

A. Create within the Loyalty Experiences tab a new voucher definition for the summer sales campaign where the Type is Product or Service and the expiration Type is fixed Date.

B. Create within the Loyalty Experiences tab a new promotion for the Summer Sales campaign where the Loyalty Promotion Type is Standard and the Fulfillment Action is Issue Voucher.

C. Create within the Loyalty Experiences tab a new Benefit Type for the Summer sale campaign where the Benefit Type Name is standard and the Category type is Issue Voucher.

D. Create within the Loyalty Experience tab a new voucher tab a new voucher definition where the Type Is Discount Percentage and the Expiration Type is fixed Date.

Correct Answer: BD

To set up a 10% discount on top of the annual summer sale for loyalty program customers in Salesforce Loyalty Management, the consultant must: Create within the Loyalty Experiences tab a new promotion for the Summer Sales campaign where the Loyalty Promotion Type is Standard and the Fulfillment Action is Issue Voucher (B):This step involves setting up a new promotion specifically for the summer sale, defining it as a standard promotion type, and specifying that the fulfillment action for eligible members will be to issue a voucher, which in this case would be the 10% discount voucher. Create within the Loyalty Experience tab a new voucher definition where the Type Is Discount Percentage and the Expiration Type is fixed Date (D):This step involves defining a new voucher that applies a discount percentage (10% in this case) to purchases, with a fixed expiration date to limit the offer to the summer sale period. This ensures that the promotion is time-bound and encourages members to take advantage of the offer during the sale. Options A and C involve creating a voucher definition and a benefit type, respectively, but do not align precisely with the steps required to set up a promotion that includes issuing a discount percentage voucher with a fixed expiration date for a specific campaign like the summer sale. Salesforce Loyalty Management documentation would provide detailed guidance on creating promotions and vouchers, ensuring that loyalty program consultants can effectively design and implement targeted offers to enhance member engagement and sales during key promotional periods.

QUESTION 2

The VP of Loyalty Technology at ABC Corp. wants to launch a new Loyalty program with minimal development time. However, its current Loyalty engine requires several complex system integrations with its marketing and customer service platforms. A Technical Consultant is brought in to assess the company\'s business requirements and recommend a feasible solution to deliver the desired Loyalty program for its customers.

Which two seamless integrations within the Salesforce ecosystem, does Salesforce Loyalty Management offer that can be easily enabled by the Technical Consultant to meet the customer\'s business requirement?

A. Salesforce Service Cloud

B. Third-party Customer Data Platform (CDP)

C. Supplier and Partner Ecosystem

D. Salesforce Marketing Cloud

Correct Answer: AD

Salesforce Loyalty Management offers seamless integrations within the Salesforce ecosystem that can be easily enabled to meet ABC Corp.\\'s business requirements for launching a new Loyalty program, including:

Option A:Salesforce Service Cloud, which can be integrated to manage customer service interactions and inquiries related to the Loyalty Program, enhancing the overall customer experience.

Option D:Salesforce Marketing Cloud, which allows for the creation and management of targeted marketing campaigns to engage Loyalty Program members, promote rewards, and encourage participation. Reference: Salesforce

documentation on Loyalty Management and its integration capabilities with Service Cloud and Marketing Cloud provides insights into how these platforms can be leveraged to support and enhance the functionality of Loyalty Programs.

QUESTION 3

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 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.

QUESTION 4

What three types of vouchers can be configured in Loyalty Management?

A. Promo Code

B. Discount Percentage

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C. Fixed Value

D. Gift Card

E. Product or Service

Correct Answer: ABC

In Salesforce Loyalty Management, the types of vouchers that can be configured include:

Promo Code (A):This voucher type allows members to redeem a code for a specific offer or discount, typically used in marketing promotions and online purchases.

Discount Percentage (B):This type of voucher provides a percentage-based discount on products or services, offering flexibility in creating varied promotional offers for loyalty program members.

Fixed Value (C):Fixed Value vouchers offer a specific monetary value that can be applied as a discount or credit towards purchases, providing a straightforward benefit to loyalty program members.

The option D, "Gift Card," and E, "Product or Service," while potentially part of a loyalty program\\'s offerings, are not classified as voucher types within the standard configurations of Salesforce Loyalty Management. Vouchers are typically used

for discounts or special offers rather than representing a stored monetary value or specific products/services. The Salesforce Loyalty Management documentation would include detailed information on configuring and managing different types

of vouchers, ensuring that loyalty program administrators can effectively create and offer a variety of benefits to meet their program\\'s goals and member needs.

QUESTION 5

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.

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