



CRM 2015
LOYALTY SETUP
USER GUIDE

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ABOUT THIS DOCUMENT

This document has been prepared as a User Guide for the setup of Green 4 Loyalty.

NON-DISCLOSURE

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DOCUMENT CONTROL

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CONTACT

Any correspondence should be addressed to:

Product Development

Green 4 Solutions Limited

16-17 Midland Court

Central Park

Lutterworth

Leicestershire

LE17 4PN

UK

Phone: +44 (0) 845 508 8149

Email: support@green4solutions.com

Web: www.green4solutions.com

INTRODUCTION

The Go Loyalty Module allows users to monitor and reward the actions of their customers. Through the Loyalty Module customers are able to sign up for a Loyalty Account and subsequently collect points linked to their actions, for example attending a fixture, opening an eCommunication, etc. The points collected can be used to "purchase" rewards (for example, attendance at a first team training session) or "bid" for items in a Loyalty Auction.

The table below gives an overview of the areas that can be found within this user guide.

LOYALTY



LOYALTY

1. LOYALTY ACCOUNTS, CARDS, TRANSACTIONS & REDEMPTIONS

Loyalty Accounts are automatically generated for a customer when they register or when a product is purchased. These accounts contain all loyalty information. Linked to the Loyalty Account are Loyalty Cards, which can be either a physical or virtual card where Loyalty points are captured. Loyalty Transactions and Redemptions are also linked to Accounts, these are created each time a customer is either awarded Loyalty Points or uses Loyalty Points to purchase an item.

2. LOYALTY PERIODS

Loyalty periods are used to group the loyalty points awarded into defined time frames. For example you may set up a loyalty period to cover a season from start to finish. Loyalty Levels can be created so that a points target must be reached within a certain Loyalty Period.

3. LOYALTY LEVELS

Loyalty Levels refer to the tiers that can be attained for different Loyalty Point levels, for example Bronze, Silver or Gold. Levels are linked to Loyalty Periods, so can be set up for each season or year, etc. Loyalty levels are used to define the level the customer is currently on and how close they are to achieving the next level.

4. LOYALTY RULES

Loyalty Point Rules determine when points are going to be awarded to Loyalty Account holders. Each Loyalty Rule must be linked to a Loyalty Transaction Source which relate to the type of data that is being imported. Where SQL script is entered that underlies the Loyalty Rules.

5. LOYALTY REWARDS

Loyalty Rewards are the offers that Loyalty Account holders can redeem their points against. For example this could be an open training session or a meet the squad opportunity. The Loyalty Rewards are made available via the loyalty portal.

6. SEASON TICKET BUY-BACK- LOYALTY SETUP

A key component of the Season Ticket Buy-Back functionality are loyalty points. Consequently, loyalty needs to be set up on the CRM system to ensure that loyalty points are transferred to the customer. This is done by creating two Loyalty Transaction Sources and two sets of Loyalty Point Rules which the Loyalty Rule Transaction Generation process must be run against.

7. AUCTION ITEMS

Auction Items can be created so that Loyalty Account holders can use their loyalty points to bid in an auction for certain items. Items can be placed on auction for a specific amount of time whilst the auction can be set up to be both open and closed, An example of an Auction Item could be a signed squad shirt.

8. LOYALTY CODES

Loyalty Codes allow the Loyalty Account holder to receive additional points by simply entering the code in the Loyalty Portal. The code can be made so only certain Card types, such as Season Ticket holders can redeem the code.

1. LOYALTY ACCOUNTS, CARDS, TRANSACTIONS AND REDEMPTIONS

Loyalty Accounts can be set up for customers within CRM 2015. Linked to a Loyalty Account a customer may have a number of Loyalty Cards. A loyalty card may not necessarily reflect an actual physical card, but could represent a unique identifier, for example a Season Ticket Membership, Supporters Fan group Membership, Email Address, etc.

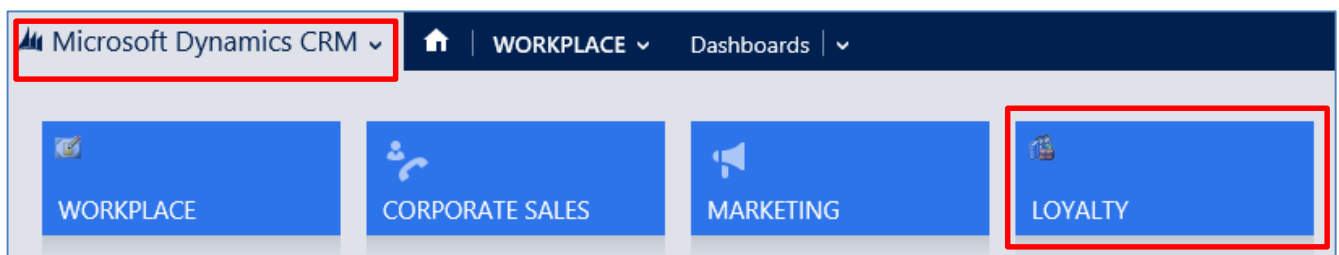
For example, Loyalty Points may be awarded to all fans for any expenditure made in the supporters shop regardless of whether they are Season Ticket Holders or not. In this instance a Membership card could be issued which could actually be presented in the shop or the supporter may simply give their email address at the time of purchase. By configuring them as a Loyalty Account in CRM with the Membership card or Email address as the "Card Number", points in this example could be awarded based on the card number or email address.

Also linked to Loyalty Accounts are Loyalty Transactions and Redemptions. A Loyalty Transaction is created every time a customer takes part in a process where they are awarded Loyalty Points, for example attending a Fixture or purchasing a product from the shop. A Loyalty Redemption will be created every time a customer uses loyalty points to purchase an item. Both of these are automatically created but it is also possible to create them manually if necessary.

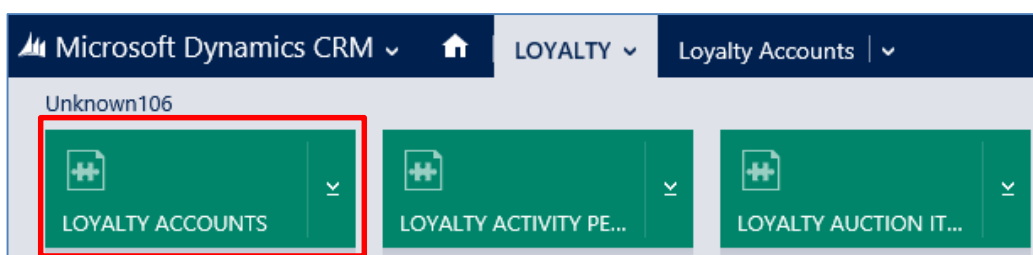
1.1. LOYALTY ACCOUNT

A Loyalty Account will automatically be generated when a customer registers during the purchase of tickets through the Green 4 Ticketing site. However a Loyalty Account can also be manually created by completing the following:

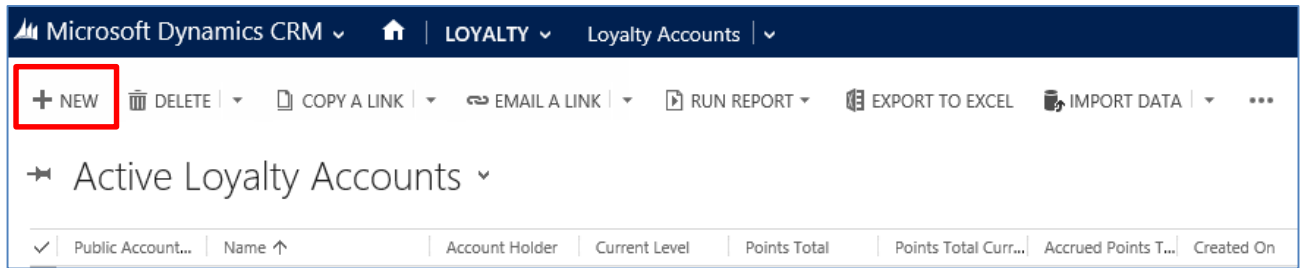
- a) In CRM, select or hover over the **Microsoft Dynamics CRM** tab in the navigation bar and from the drop down choose **Loyalty**.



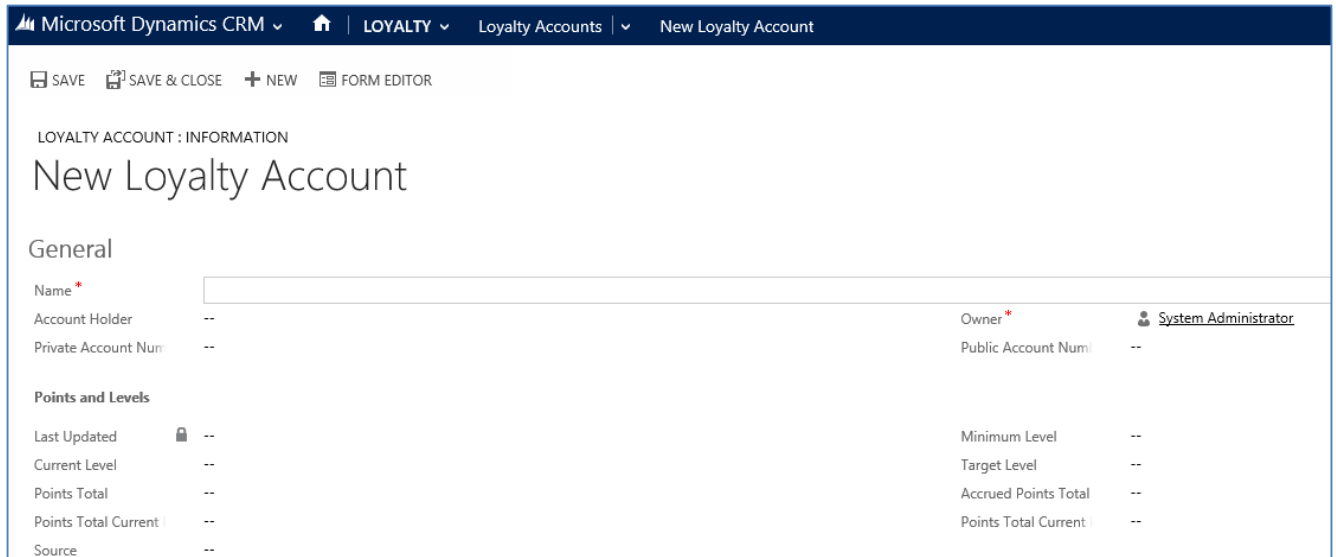
- b) Select the **Loyalty** tab in the navigation bar and from the drop down choose **Loyalty Accounts**.



c) The Active Loyalty Accounts view will be shown, select **New** in the ribbon.



d) A New Loyalty Account will be displayed, complete the following details.



- **Name.** Enter the name of the Loyalty Account. This will normally be the name of the Account holder.
- **Account Holder.** Use the magnifying glass to look up and select the Account Holder from the list of Contacts held in your database. When a Loyalty Account is automatically created as the result of a ticket purchase the details of the registered contact will be automatically entered.
- **Private Account Number.** Enter the Private Account Number. The Private Account Number will be used by the system to identify the Loyalty Account. The Private and Public Account Numbers can match.
- **Owner.** The currently logged in user's name will be automatically entered
- **Public Account Number.** Enter the Public Account Number. The Public Account Number will be displayed on the loyalty portal. The Private and Public Account Numbers can match. This is used as the User Name to log in to the Loyalty Portal.
- **Current Level.** If applicable, use the magnifying glass to lookup and select the account holder's current [Loyalty Level](#), this is based on Current Points and [Loyalty Levels](#) that have been set up, for example Gold, Silver or Bronze.
- **Points Total.** The Points Total field will be automatically updated as the Loyalty Account earns and uses points.
- **Points Total Current Period.** The total number of points accrued in the current period will be automatically displayed.

- **Source.** This field does not need to be completed.
- **Minimum Level.** If applicable, use the magnifying glass to lookup and select the account holder's minimum loyalty level, for example Gold, Silver or Bronze.
- **Target Level.** If applicable, use the magnifying glass to lookup and select the account holder's target loyalty level. This is the next [Loyalty Level](#) that can be attained.
- **Accrued Points Total.** The total number of points accrued by the account during all periods will automatically be displayed.
- **Points Total Current Period For Level.** Represents the sum of loyalty transactions for the account, in the current period, where the transactions count towards the level.

e) When the details are complete select **Save** on the ribbon.

EXAMPLE OF A LOYALTY ACCOUNT RECORD CREATED

The table below shows the fields that have been completed in an example Loyalty Account form that has been created for this document.

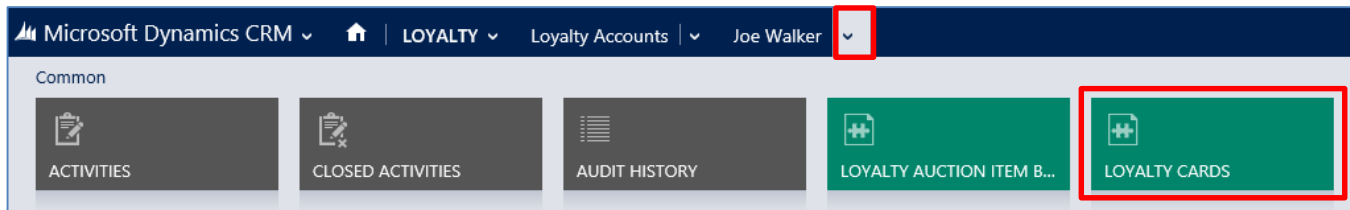
Record Type	Name	Account Holder	Owner	Public Account Number	Current Level	Points Total	Points Total Current	Target Level	Accrued Points Total	Points Total Current
Loyalty Account	Joe Walker	Joe Walker	SYSTEM	SG49	Bronze	70	70	Silver	600	70

1.2. LOYALTY CARD

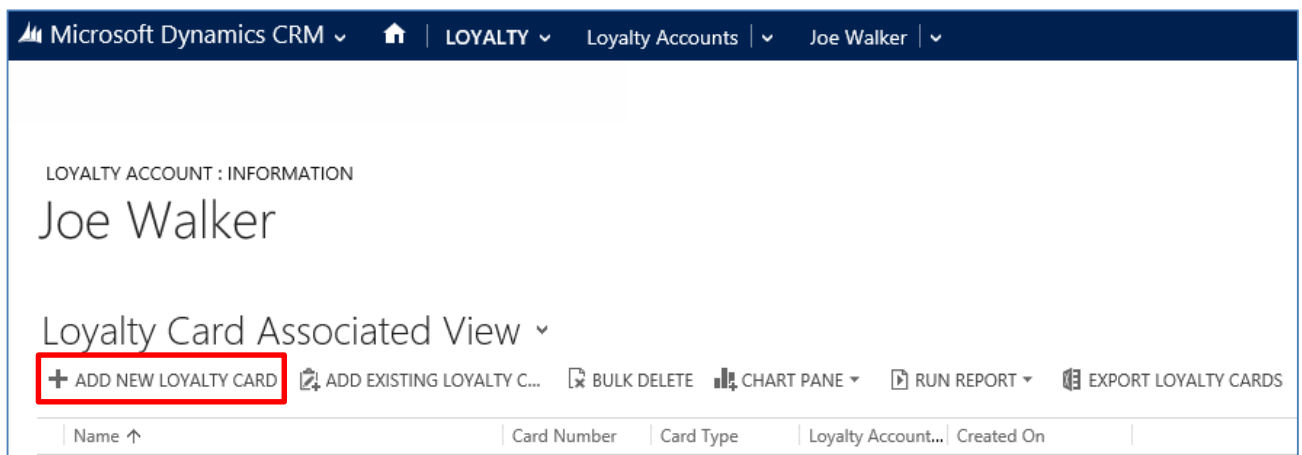
A Card Type does not have to relate to a Physical Card. For example you may have Season Ticket Holders who have a physical card to access Fixtures and Events, however someone may not be a Season Ticket Holder but has registered their email address to accrue points when buying merchandise through the online or on site store. A Card Number would then be their email address and you may class them as having a card type of "Online" or "Email Address".

To add a loyalty card to a [Loyalty Account](#) carry out the following:

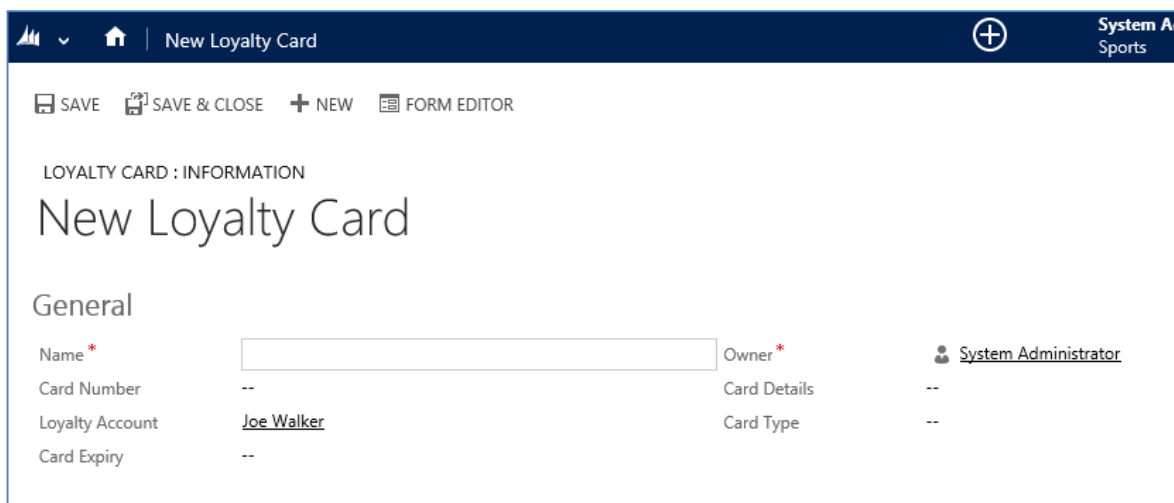
- a) With the Loyalty Account record open, select the small arrow in the navigation bar next to the name of the Loyalty Account. From the drop down, choose **Loyalty Cards**.



- b) The Loyalty Card Associated View will be displayed, selected **Add New Loyalty Card** on the ribbon.



- c) A New Loyalty Card form will be displayed, complete the following details:



- **Name.** Enter the name of the Loyalty Card.
- **Card Number.** Enter the card number. The card number can be a unique identifier such as an email address if physical cards are not used.

- **Loyalty Account.** The name of the [Loyalty Account](#) will be automatically entered.
- **Card Expiry.** Enter the date that the Loyalty Card will expire.
- **Owner.** The currently logged in user's name will automatically be entered.
- **Card Details.** Use to enter any additional information pertaining to the card, for example the contact's seat number if the card is linked to a season ticket.
- **Card Type.** Use the magnifying glass to lookup and select the Card Type. If no Card Type is displayed select New from the drop down and create a Card Type. The Card Type is used to categorise the card holders into groups, for example Staff, Corporate, Individual, Student, etc. As well as being an indication as to the type of card, it is also used when [Loyalty Bonus](#) points are only to be awarded to accounts with a certain type of card.

d) When the details are complete select **Save & Close** on the ribbon.

e) The Card will be added to the Loyalty Card Associated View.

EXAMPLE OF A LOYALTY CARD RECORD CREATED

The table below shows the fields completed in an example Loyalty Cards form created for this document.

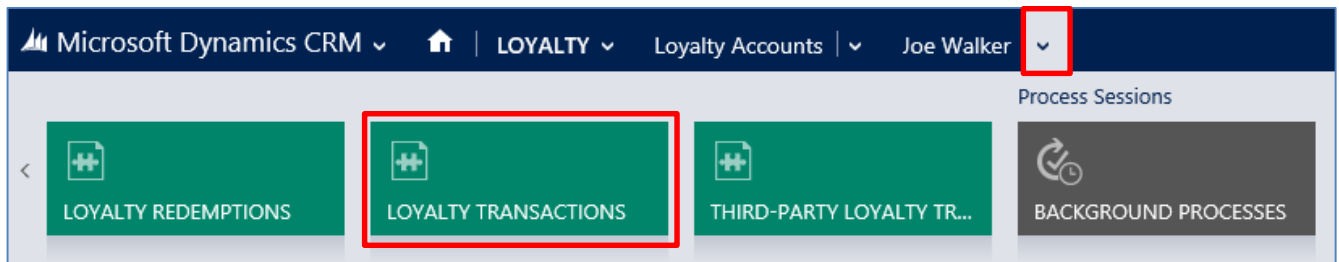
Record Type	Name	Card Number	Loyalty Account	Card Expiry	Card Type
Loyalty Card	Loyalty Reward Card	843094	Joe Walker	17/06/2015	Student

1.3. LOYALTY TRANSACTIONS

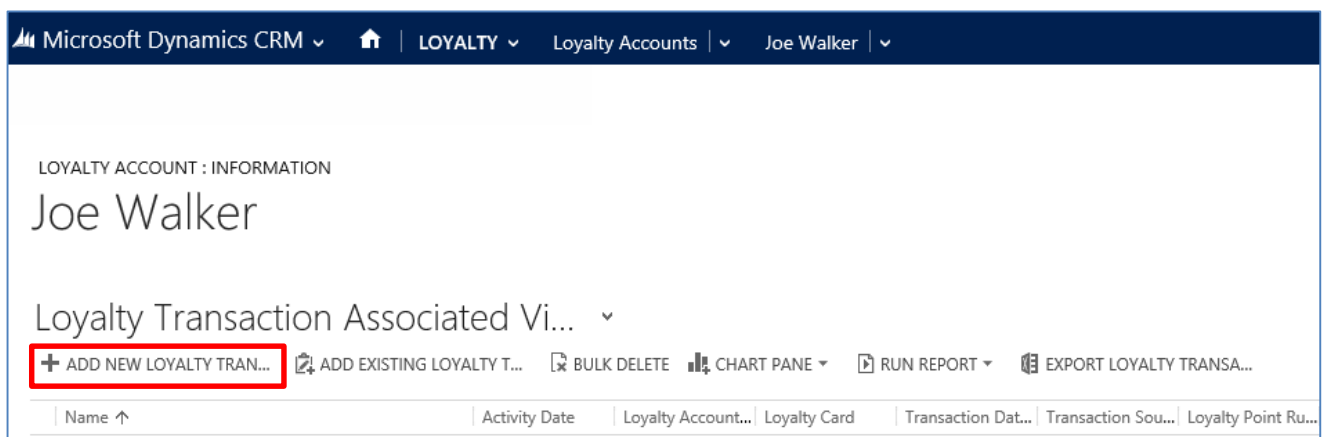
Against an account, any Transactions which have resulted in Loyalty points being awarded will be listed under the Loyalty Transactions area. Whilst Transactions normally get imported via a data feed they can also be entered as well.

To view the transactions linked to an account do the following:

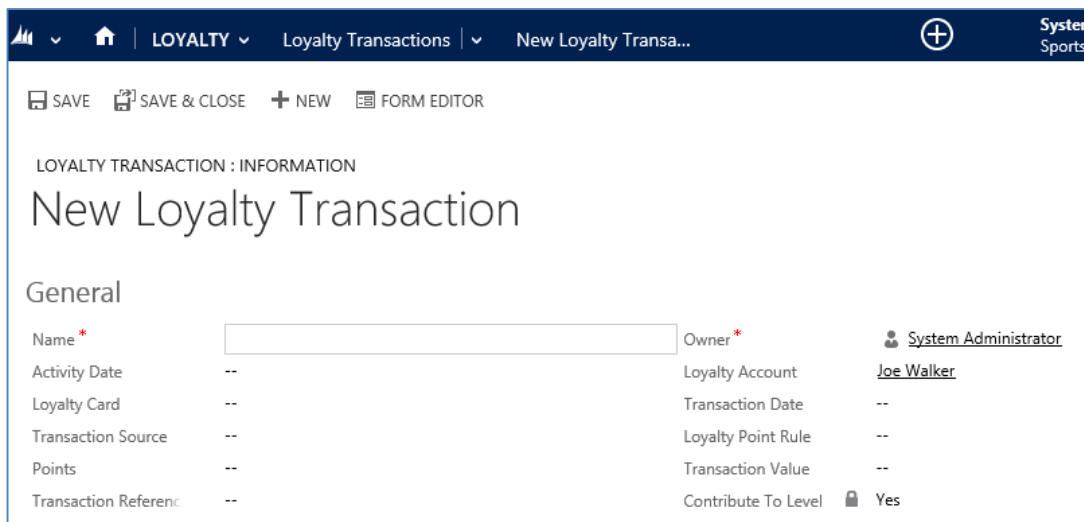
- a) With the Loyalty Account record open, select the small arrow in the navigation bar next to the name of the Loyalty Account. From the drop down, scroll across and choose **Loyalty Transactions**.



- b) The Loyalty Transaction Associated View will be displayed. Transactions are normally added to an account automatically as the result of the [Loyalty Rules](#) running in the background. However **manual transactions** can be added as follows.
- c) Select **Add New Loyalty Transaction** on the ribbon.



- d) A New Loyalty Transaction form will be displayed, complete the following details:



- **Name.** Enter a name for the Transaction. The name of the transaction would normally reflect the reason for points being awarded, for example Attendance at a Fixture, Purchase from the Shop, etc.
- **Activity Date.** The date on which the activity that was awarded points occurred. For example the date of the fixture or the date the purchase in the shop was made.
- **Loyalty Card.** Use the lookup dialog to identify the [Loyalty Card](#) that was awarded points
- **Transaction Source.** This field is not required for manual entries.
- **Points.** Enter the number of points to be added to the Loyalty Account.
- **Transaction Reference.** This field is not required for manual entries.
- **Owner.** The currently logged in user's name will automatically be entered.
- **Loyalty Account.** The name of the loyalty account will automatically be entered.
- **Transaction Date.** This field is not required for manual entries.
- **Loyalty Point Rule.** This field is not required for manual entries.
- **Transaction Value.** This field is not required for manual entries.

d) When the details are complete, select **Save & Close** on the ribbon.

EXAMPLE OF A LOYALTY TRANSACTION RECORD CREATED

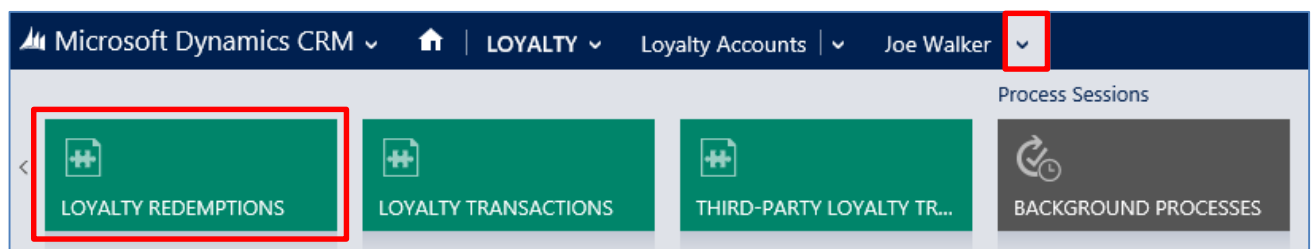
The table below shows the fields which have been completed in an example Loyalty Transaction form that has been created for this document.

Record Type	Name	Activity Date	Loyalty Card	Points	Loyalty Account
Loyalty Transaction	Home Kit Purchase	12/02/2015	Loyalty Rewards Card	100	Joe Walker

1.4. LOYALTY REDEMPTIONS

Against an account, any Redemption where loyalty points have been used to purchase items will be listed under the Loyalty Redemptions area. To view the redemptions linked to an account carry out the following:

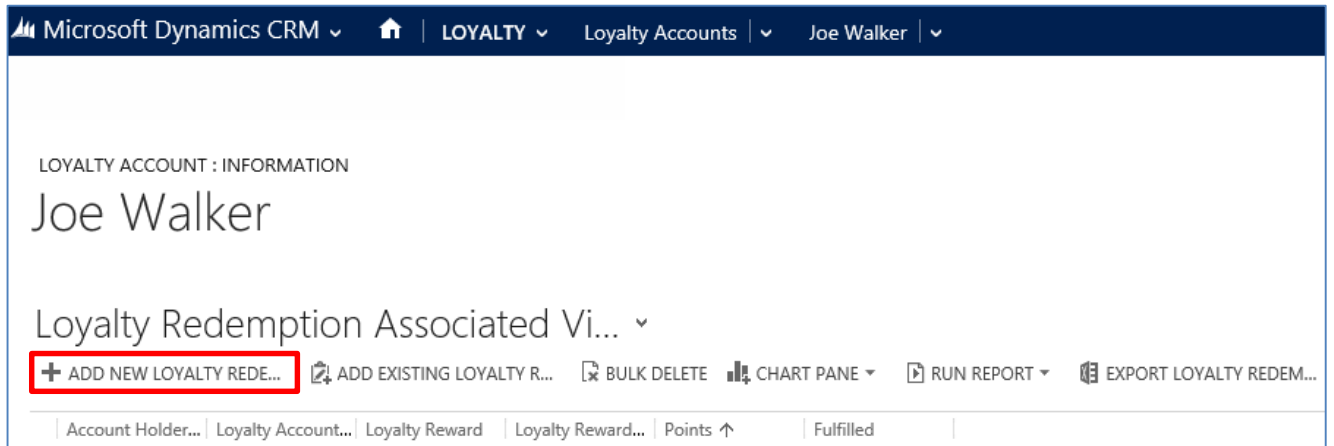
- With the [Loyalty Account](#) record open, select the small arrow in the navigation bar next to the name of the Loyalty Account and from the drop down scroll across select **Loyalty Redemptions**.



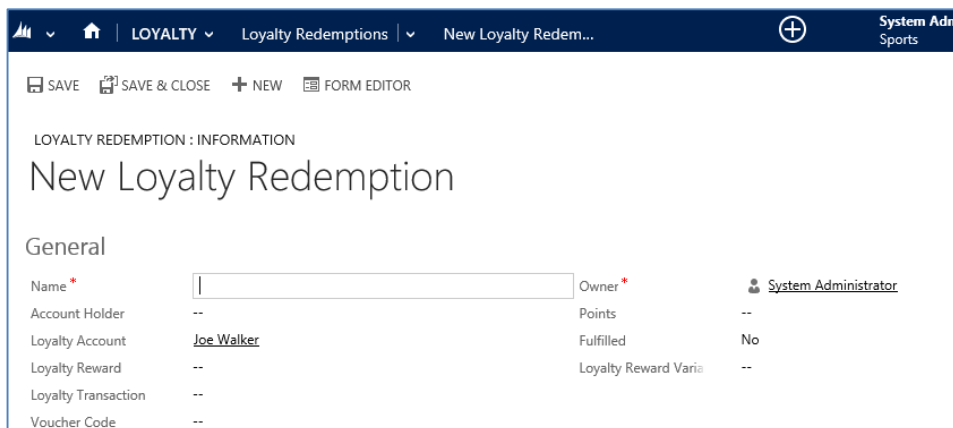
- b) The Loyalty Redemption Associated View will be displayed, and any current redemptions will be displayed.

Redemption records will automatically be created when the account holder redeems points against a reward or auction item on the loyalty portal. However, you can **manually add the details** of loyalty points being redeemed as follows:

- c) With the Loyalty Redemption Associated View open, select **Add New Loyalty Redemption** on the ribbon.



- d) A New Loyalty Redemption form will be displayed, complete the following details:



- **Name.** Enter a name for the Redemption.
- **Account Holder.** Use the Lookup Records dialog to select the Account Holder.
- **Loyalty Account.** The name of the [Loyalty Account](#) will automatically be entered.
- **Loyalty Reward.** Use the Lookup Records dialog to select the [Loyalty Reward](#) which the points have been used to purchase.
- **Loyalty Transaction.** Not required for manual entries.
- **Voucher Code.** Not required for manual entries.
- **Owner.** The currently logged in user's name will automatically be entered.
- **Points.** Enter the number of points to be redeemed. When redeeming points, enter the value as a negative number, for example enter -10 to redeem 10 points.
- **Fulfilled.** Select **Yes** if the redemption has been fulfilled.

- **Loyalty Reward Variant.** If applicable use the Lookup to select the Loyalty Reward Variant.

e) When the details are complete, select **Save & Close** on the ribbon.

EXAMPLE OF A LOYALTY REDEMPTION RECORD CREATED

The table below shows the fields which have been completed in an example Loyalty Redemption form that has been created for this document.

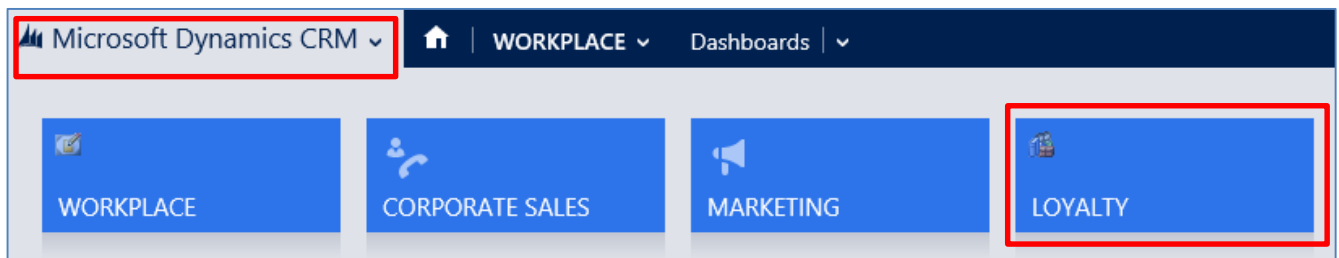
Record Type	Name	Account Name	Loyalty Account	Loyalty Reward	Points	Fulfilled
Loyalty Redemption	Signed Shirt	Joe Walker	Joe Walker	Signed Shirt	-200	Yes

2. LOYALTY PERIODS

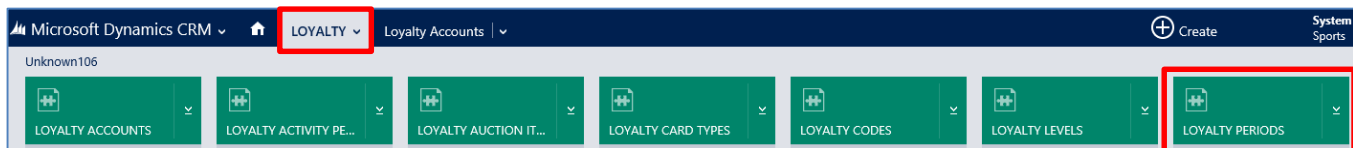
Loyalty periods are used to group the loyalty points awarded into defined time frames, for example you may set up a loyalty period to cover a season from start to finish. [Loyalty Levels](#) can be created so that a points target must be reached within a certain Loyalty Period.

To create a Loyalty Period, complete the following:

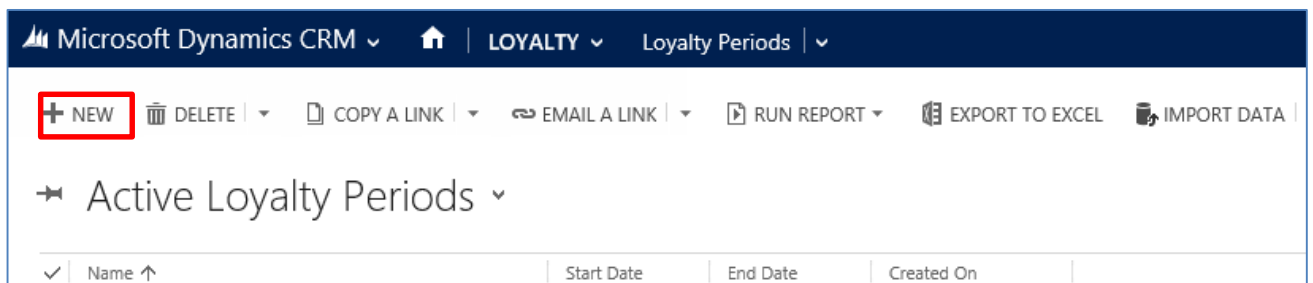
- a) In CRM, select or hover over the **Microsoft Dynamics CRM** tab in the navigation bar and from the drop down choose **Loyalty**.



- b) Select the Loyalty tab in the navigation bar and from the drop down choose **Loyalty Periods**.



- c) The Active Loyalty Periods view will be displayed, select **New** on the ribbon.



- d) A New Loyalty Period form will be displayed, complete the following:

- **Name.** Enter the name of the loyalty period, for example Season 2014/15
- **Start Date.** Enter the start date of the period.
- **Owner.** The currently logged in user's name will be automatically entered.

- **End Date.** Enter the end date of the period.

e) Once the details are complete select **Save & Close** on the ribbon.

EXAMPLE OF A LOYALTY PERIOD RECORD CREATED

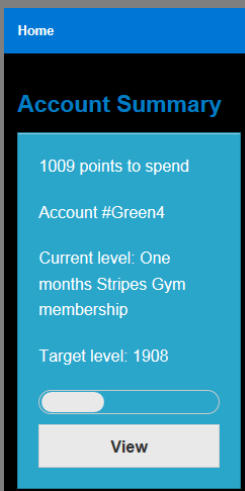
The table below shows the fields which have been completed in an example Loyalty Period form that has been created for this document.

Record Type	Name	Start Date	End Date
Loyalty Period	2014/15 Season	01/08/2014	01/06/2015

3. LOYALTY LEVELS

Loyalty Levels refer to the tiers which can be attained for different levels of Loyalty, for example Bronze, Silver or Gold. Levels are linked to [Loyalty Periods](#), so can be set up for every season or year, etc.

Loyalty levels are used to define the level the customer is currently on and how close they are to achieving the next level. Within CRM this can be seen on the [Loyalty Account](#) form and the information is also displayed in the Account Summary area of the loyalty portal, as shown below:

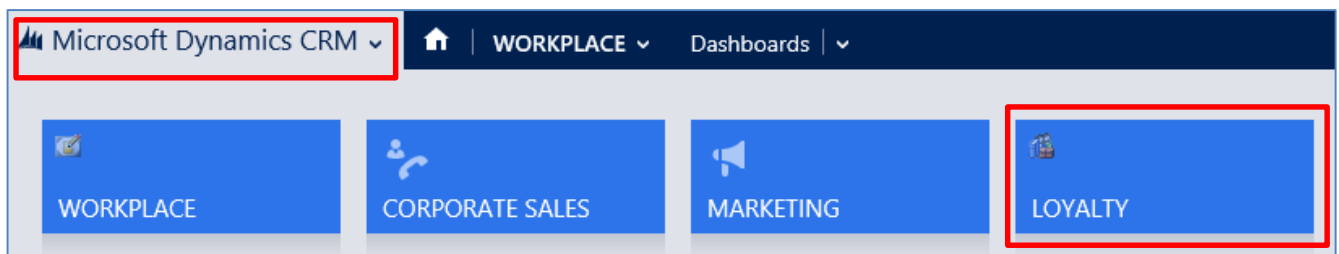


In the above example, the customer is currently on the **One Months Stripes Gym Membership** level and is aiming to reach the **1908** level.

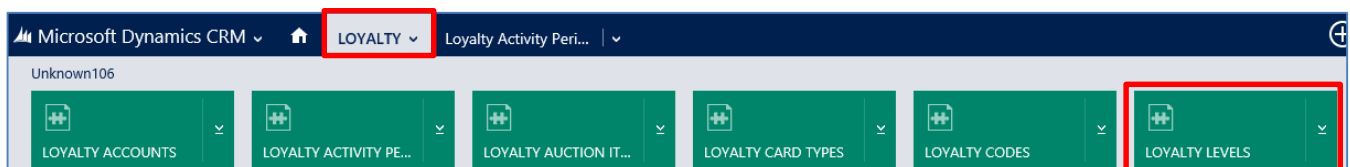
A progress bar shows how close the customer is to reaching the next level of the loyalty scheme

To set up the loyalty levels, complete the following instructions:

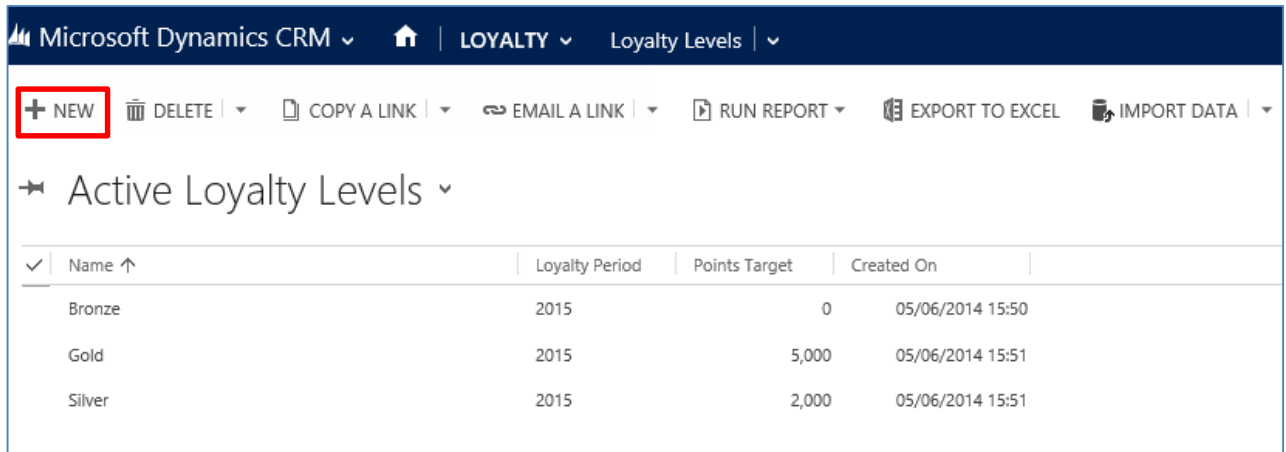
- In CRM, select or hover over the **Microsoft Dynamics CRM** tab in the navigation bar and from the drop down choose **Loyalty**.



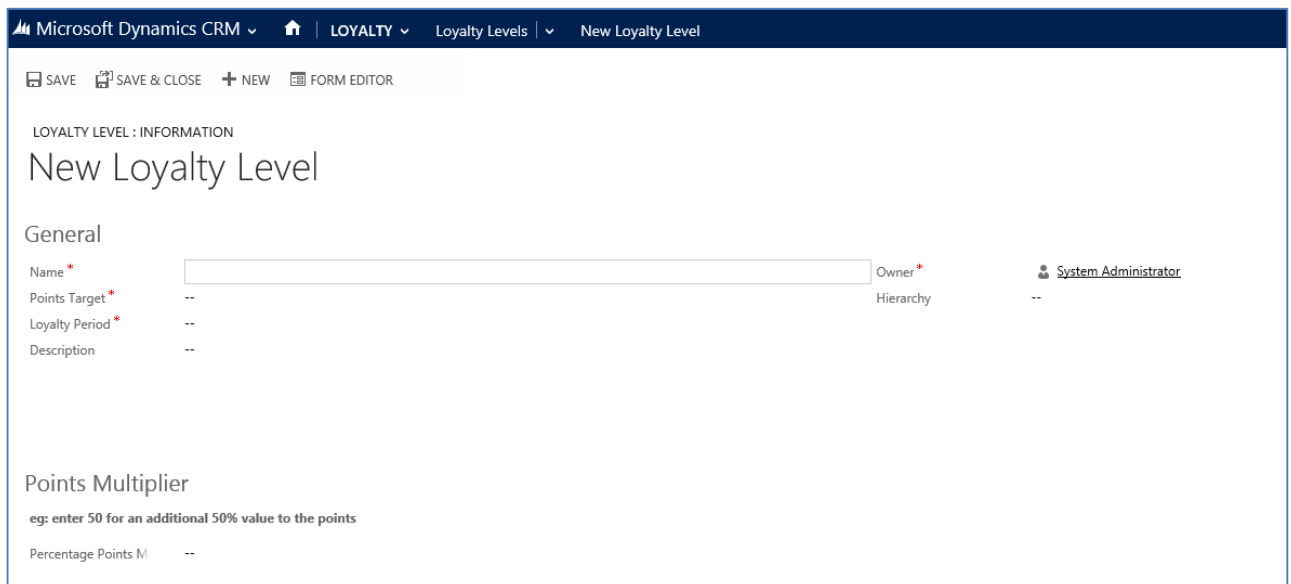
- Select the **Loyalty** tab in the navigation bar and from the drop down choose **Loyalty Levels**.



c) The Active Loyalty Levels view will be shown select **New** on the ribbon.



d) A New Loyalty Level form will be displayed, complete the following details:



- **Name.** Enter the name of the Loyalty Level, for example Bronze, Silver or Gold.
- **Points Target.** Enter the number of points the account holder must achieve during the [Loyalty Period](#) in order to reach the loyalty level.
- **Loyalty Period.** Use the magnifying glass to lookup and select the [Loyalty Period](#) the level relates to. To move up to a level, the Points Target must be achieved during the selected [Loyalty Period](#).
- **Owner.** The currently logged in user's name will be automatically entered.
- **Hierarchy.** Enter a number to indicate the hierarchy of the Loyalty Level. The bigger the number entered, the higher the level.
- **Description.** Enter a description of the level.
- **Percentage Points Multiplier.** This allows a certain Loyalty Level to get X% more points per transaction. For example by entering 50.00, this would give an additional 50% value to the points.

e) When the details are complete select **Save & Close** on the ribbon. Repeat the above process for each Loyalty Level that is to be created.

EXAMPLE OF A LOYALTY LEVEL RECORDS CREATED

The table below shows the fields which have been completed in an example Loyalty Level Records form created for this document.

Record Type	Name	Points Target	Loyalty Period	Hierarchy
Loyalty Record	Gold	5,000	2014/15 Season	3
Loyalty Record	Silver	2,000	2014/15 Season	2
Loyalty Record	Bronze	0	2014/15 Season	1

4. SETTING UP LOYALTY RULES

Setting up Loyalty Rules is a two-stage process:

- 1) Set up the [Loyalty Transaction Source](#): Transaction Sources relate to the type of data that is being imported (or even manually entered). Against each Transaction Source the default Number of points awarded per unit is specified. The Loyalty Transaction Source entity is used to define the SQL that underlies the Loyalty Rules.
- 2) Set up the [Loyalty Point Rule](#): The loyalty point rules determine when points are going to be awarded to a Loyalty Account holder. For example a loyalty point rule will be used to identify a fixture an account holder must attend before points are awarded.

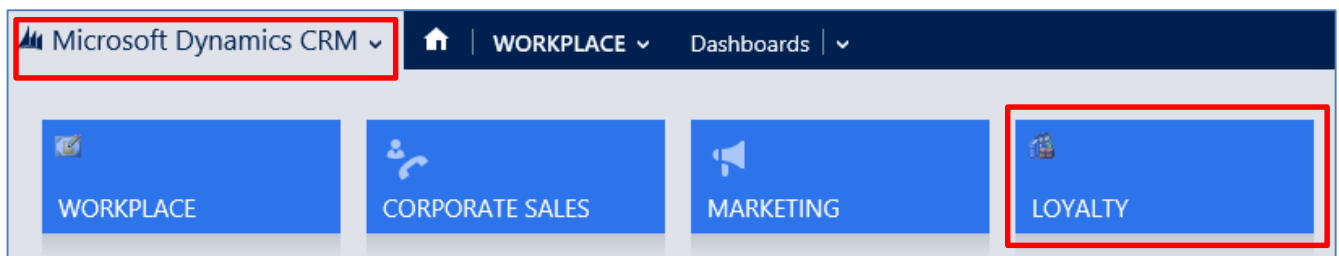
4.1. LOYALTY TRANSACTION SOURCE



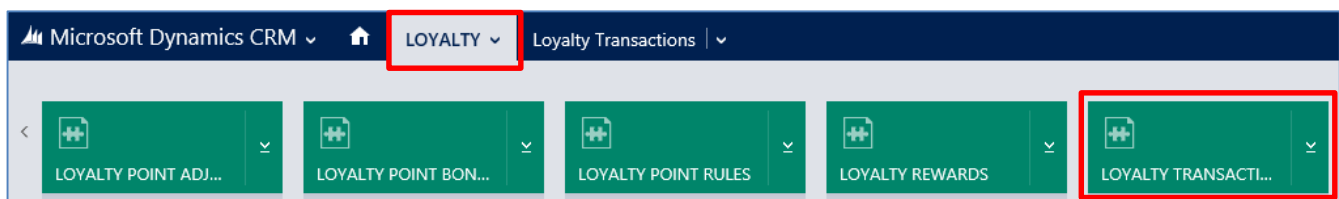
During the configuration of the Loyalty Module, Green 4 Solutions will set up a number of Loyalty Transaction Source records, these records should **NOT** be changed. The default set of Loyalty Transaction Source records can be used repeatedly with a number of loyalty rules. For example, Green 4 Solutions may set up a transaction source to apply points to Loyalty Accounts each time a ticket is purchased or an eCommunication is read. Using the Loyalty Rules, you can define which Fixture the account holder must purchase a ticket for, or, which communication they must open. **New Loyalty Transaction Source records should only be created by users who have extensive understanding of SQL.**

To create a new Loyalty Transaction Source record, complete the following details:

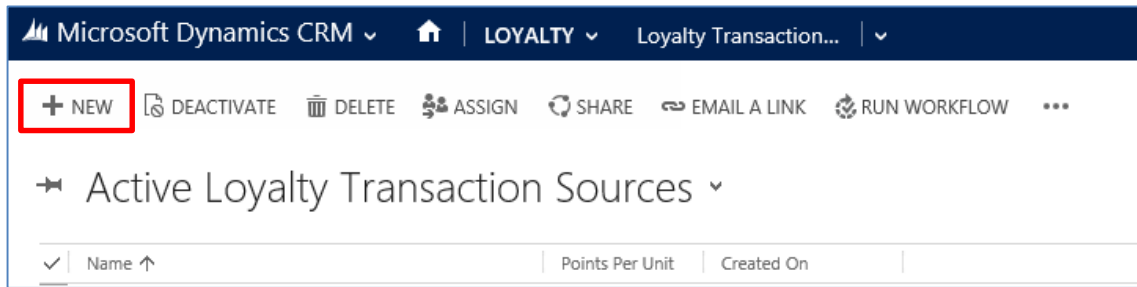
- a) In CRM, select or hover over the **Microsoft Dynamics CRM** tab in the navigation bar and from the drop down choose **Loyalty**.



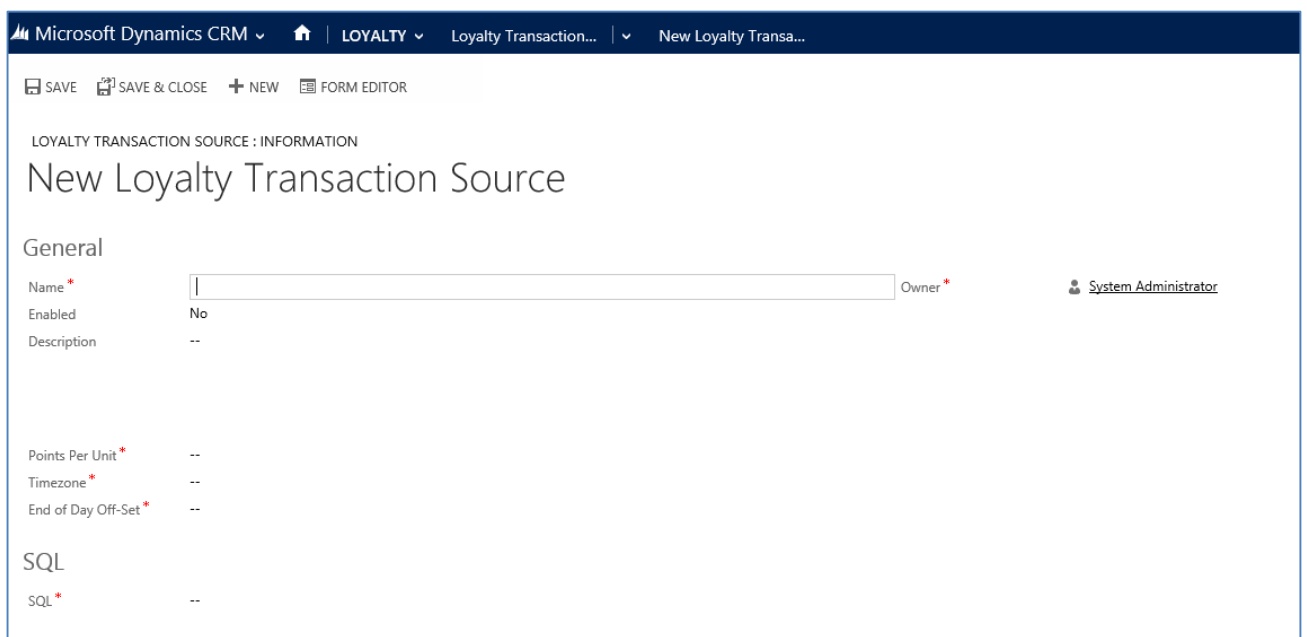
- b) Select the **Loyalty** tab in the navigation bar and from the drop down scroll across before choosing **Loyalty Transaction Sources**.



c) A list of Active Loyalty Transaction Sources will be displayed, select **New** on the ribbon



d) A New Loyalty Transaction Source form will be displayed, complete the following details:



- **Name.** Enter the name of the Loyalty Transaction Source. It is recommended you use descriptive names that help other users to identify the purpose of the source.
- **Owner.** The currently logged in user's name will be automatically entered.
- **Enabled.** Select **Yes** if the transaction is ready to be used by the system. Transactions should be in a disabled state if they are still in development, or no longer in use. Only Transaction Sources which are enabled will be used to apply points to [Loyalty Accounts](#).
- **Description.** Enter a description of the source. The description field should be used to describe the purpose and outcome of the SQL added to the Loyalty Transaction Source record.
- **Points Per Unit.** Enter the number of points that will be awarded per unit. This field should be set to 0 if the points to be awarded are determined by the linked [Loyalty Rules](#).
- **Timezone.** Used for Timezone specific promotions. For such promotions this field is used by CRM to identify which Timezone to use for monitor the awarding of points. A list of Timezones can be found using the following link <http://stackoverflow.com/questions/7908343/list-of-timezone-ids-for-use-with-findtimezonebyid-in-c>

- **End of Day Off-Set.** Enter the number of hours beyond the end of the day the transaction can be applied. This is for situations where you may own a restaurant or bar that stays open after midnight, but want the loyalty points to be accrued as if it were the day before (i.e. a burger bought at 1am would still count for the previous days total).
- **SQL.** Enter the underlying SQL code that will be used to calculate the points applied to the loyalty account. This is usually configured by Green 4 Solutions.

e) When the details are complete select **Save** on the ribbon.

4.2. LOYALTY POINT RULES

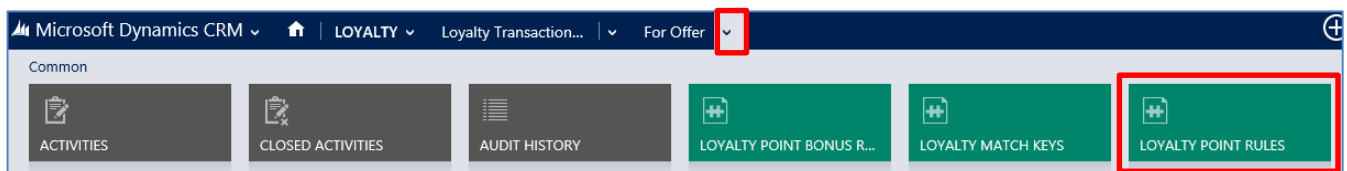
When the [Loyalty Transaction Source](#) record has been set up you can create the Loyalty Point Rules. The Loyalty Point Rules determine when points are going to be awarded to a [Loyalty Account](#) holder. For example a loyalty point rule will be used to identify a fixture an account holder must attend before points are awarded.

Within the constraints of the standard installation there are two methods by which points can be rewarded using Loyalty Point Rules:

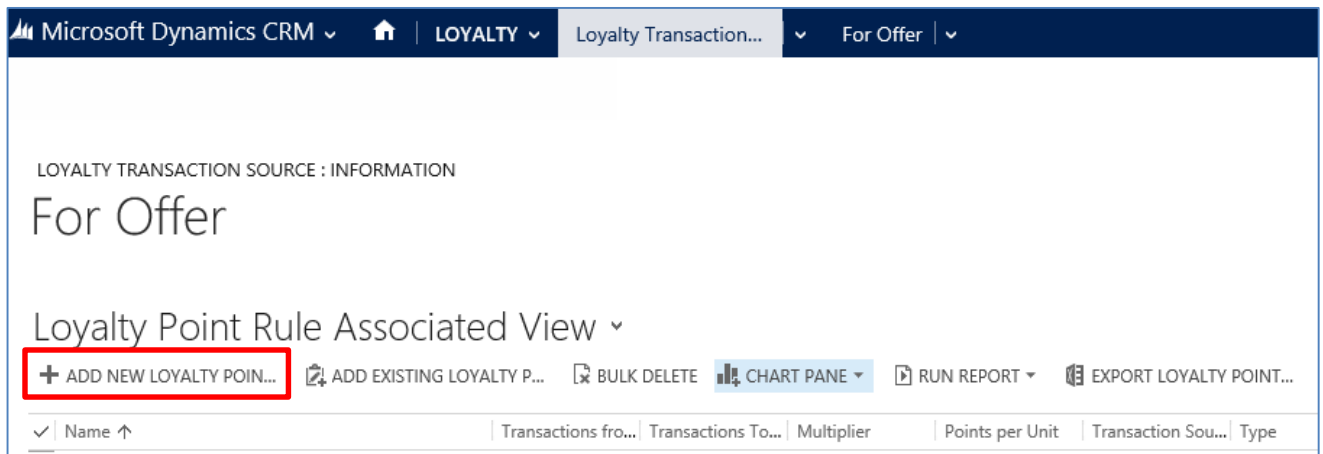
- A fixed number of points awarded for a specific rule, for example:
 - 150pts awarded for attending a match
 - 1 point for every £1 spent on merchandise
 - 20 Points for buying a Hot Dog at a concession stand on a game day.
 - 500 Bonus points for attending a certain game (a less popular or midweek game).
 - 50 Bonus points for turning up more than an hour early to a match.
 - 200 Points for watching a televised game and accessing the website to enter the code that was displayed on TV during the game.
- A points multiplier, for example:
 - Double points for attending a certain match
 - Double points for on merchandise bought at the club shop
 - Triple points for Food and Beverage purchased from a concession stand between certain dates or during a specific match.

To set up a Loyalty Points Rule:

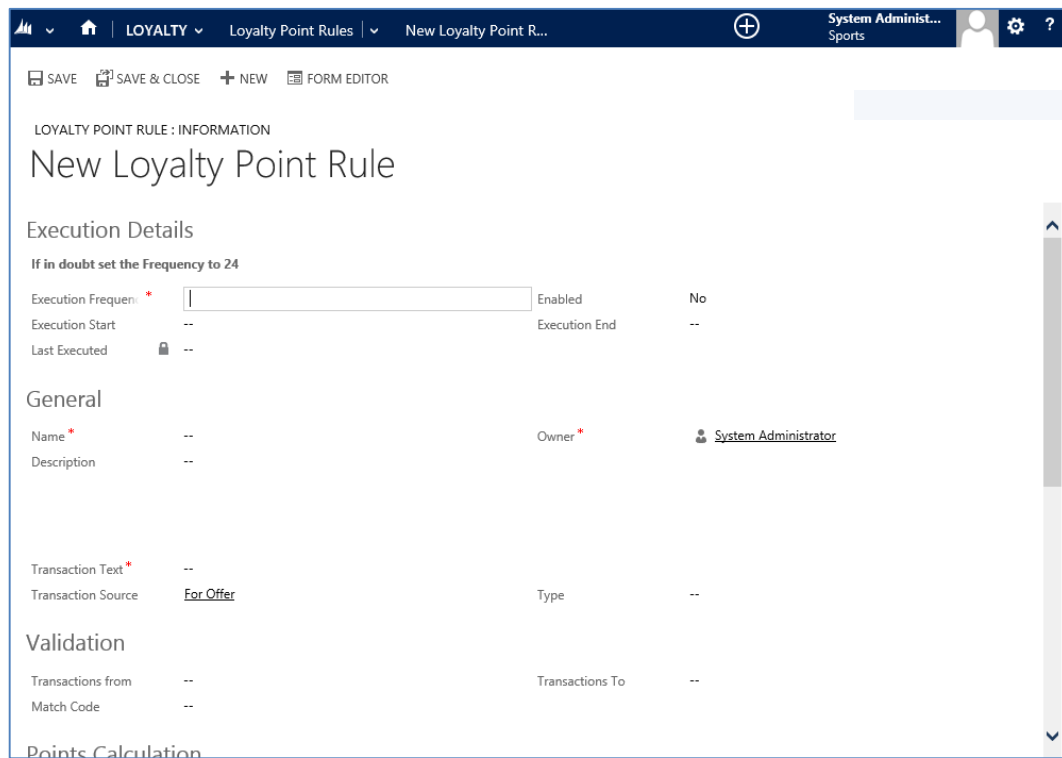
- With the [Loyalty Transaction Source](#) record open, select the small arrow next to the name of the Loyalty Transaction Source in the navigation bar before choosing **Loyalty Point Rule** from the drop down.



b) The Loyalty Point Rule Associated View will be displayed select **Add New Loyalty Point Rule** in the ribbon.



c) A New Loyalty Point Rule form will be displayed, complete the following details:



Execution Details:

- **Execution Frequency in Hours.** Enter the frequency when the rule should run. To reduce load on the server it is advised that this is set to be no more frequent than 24 hours unless there is a specific reason it needs to be more frequent.
- **Execution Start.** Enter the date and time the rule is first required to run. If the rule was related to attendance for example, then the Execution Start Date/Time should be set to a date and time after the data for that attendance will be imported.
- **Last Executed.** This field will automatically update with the date and time the rule was last run.

- **Enabled.** The rule should only be enabled when the details of the rule are finalised and to do this select **Yes**. When the rule is no longer in use, for example the fixture the rule applies to has passed, the status should be changed back to **No**.
- **Execution End.** If the rule is for a one off event or limited time, for example attendance for a particular event, then it is advised to set an end date and time to prevent the system having to run processes it does not need to.

General:

- **Name.** Enter the name of the Loyalty Points Rule. It is recommended that you use descriptive names that help other users to identify the purpose of the rule.
- **Owner.** The currently logged in user's name will be automatically entered.
- **Description.** Enter a description of the rule.
- **Transaction Text.** Enter the text that will appear on the loyalty statement when the rule is applied to a loyalty account. As the transaction text will be displayed on the loyalty statement viewed by the account holder via the loyalty portal, it is important to ensure the text entered is meaningful.
- **Transaction Source.** The transaction source will be automatically set to the source selected when the new rule form was opened.
- **Type.** Enter the type of [Loyalty Card](#) the rule will be applied to. Only [Loyalty Accounts](#) with the appropriate Loyalty Card Type listed will have points applied when the rule is run. If the Loyalty Rule is not limited to one card type leave this field blank.

Validation:

- **Transactions From.** Enter the start of the time frame transactions must occur, in order to qualify for loyalty points. This field can be left blank if the rule applies to a specific Fixture or Event.
- **Transactions To.** Enter the end of the time frame transactions must occur, in order to qualify for Loyalty points. This field can be left blank if the rule applies to a specific Fixture or Event.
- **Match Code.** If the points rule relates to points being awarded for attending a Fixture or Match then enter the Fixture/Event code that points will be awarded for. If the rule relates to points being awarded for spend on merchandise or F&B etc. then the Match Code can be entered as * and will be ignored. The Match Code can only be used once, under the same [Transaction Source](#). To use it more than once with the same [Transaction Source](#) then it needs to be setup as a [Loyalty Bonus Rule](#) instead.

Points Calculation:

- **Qualifying Unit.** Enter the qualifying unit. The value entered will be used by the [Loyalty Transaction Source](#) SQL. For example if points are awarded for every pound spent then enter 1. Alternatively if points are awarded for every two shirts bought, enter 2. The exact value required will depend upon the [Loyalty Transaction Source](#) that is being referred.

- **Points per Unit.** Enter the points awarded per qualifying unit, i.e. if the customer is awarded one point for every pound spent enter 1 in the qualifying unit and 1 in the points per unit fields.
- **Contribute To Level.** Select **Yes** if the rule is to contribute to a [Loyalty Level](#).
- **Qualifying Threshold.** The qualifying threshold is used by [Loyalty Transaction Source](#) SQL to determine the threshold that has to be surpassed in order to qualify for loyalty points. Examples would include, how early an individual has to arrive at a fixture (if rewarding early attendance), or, how much a person needs to spend (if rewarding shop purchases). The exact value required will depend upon the [Loyalty Transaction Source](#) that is being referred.
- **Max No of Points per Transaction.** Enter the maximum number of points an account can be awarded for a single transaction. This field can be left blank if there is no limit.
- **Disable Loyalty Level Multiplication.** By default this is set to **No** so that the Points Rules takes into account the Loyalty Level bonus amount to be applied. If it is not required to apply the bonus percentage for this particular rule then select **Yes** in this field.

Points Expiration:

- **Expiration Date.** Enter the date after which all unused points accrued will expire.
- **Expiration Days.** Enter the number of days before any unused points generated from this rule will expire.

d) When the details are complete select **Save & Close** on the ribbon.

EXAMPLES OF LOYALTY POINT RULES RECORDS CREATED

Award 100 bonus points for turning up at least 30 minutes prior to a specific event

Note that the Qualifying Threshold and Qualifying Unit can be set up differently to achieve the same result.

Field Names	Early Attendance Match 250 V Green 4 United	Early Attendance Match 250 V Green 4 United
Description	Early Attendance Bonus of 100 points if arriving at least 30 minutes prior to event.	Early Attendance Bonus of 100 points if arriving at least 30 minutes prior to event
Transaction Text	Early Attendance	Early Attendance
Match Code	250	250
Qualifying Threshold	29	0
Qualifying Unit	1	30
Max No of Points Per Transaction	100	100
Points Per Unit	100	100

Awarding 100 points for every £5 spent over the first £50 in a single transaction.

Set threshold to 50 and then unit to 5 and Points Per Unit to 100. As there is no limit you would leave the Maximum No of Points Per Transaction blank. If you wanted to cap the points being provided only on spend up to 200 you would set the Maximum to 3000.

Filed Name	Minimum Spend 50
Description	100 points for every £5 spent over the first £50
Transaction Text	Minimum Spend £50
Match Code	*
Qualifying Threshold	50
Qualifying Unit	5
Max No of Points Per Transaction	
Points Per Unit	100

Award 10 Points for every £5 spent on T-Shirts.

Note that this type of rule would rely on a Merchandise import being configured to import at transaction line level and to import a Product Category or Description

Field Name	10 Points for £5 T-Shirt Spend
Description	10 points for every £5 spent on T-Shirts
Transaction Text	Points for T-Shirt Spend
Match Code	*T-Shirt*
Qualifying Threshold	0
Qualifying Unit	5
Max No of Points Per Transaction	
Points Per Unit	10

Note that in this case you can specify how it searches the transaction description or category, to identify a "T-Shirt" sale.

- *T-Shirt* will perform a 'contains' search
- *T-Shirt will perform an 'ends with' search
- T-Shirt* will perform a 'begins with' search
- T-Shirt will perform an 'exact match' search

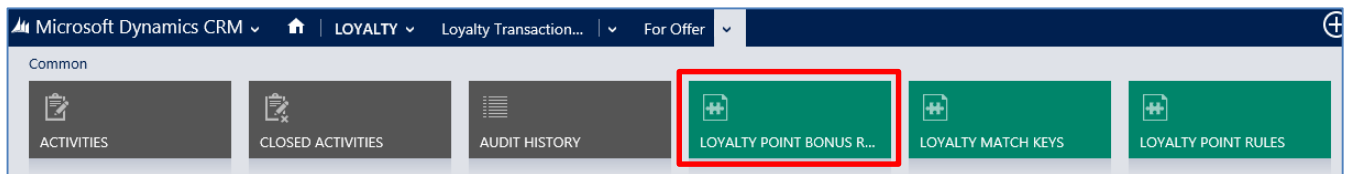
4.3. LOYALTY BONUS RULES

For each activity that you are measuring you can only create a single [Loyalty Points Rule](#) linked to the [Transaction Source](#). For example if you are rewarding early attendance at a Fixture, you cannot create a rule to award 100 pts to a customer if they attend 30 minutes and a second rule to award 200 points if they attend 60 minutes early. In this instance only one rule would be executed.

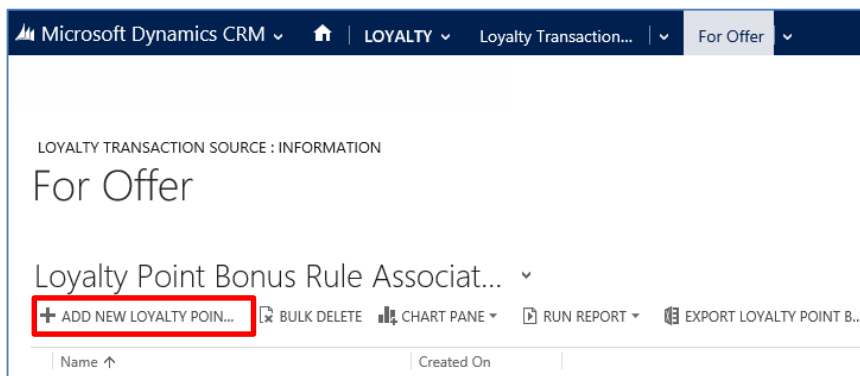
To allow for this situation you can create a Loyalty Bonus Rules. Unlike standard Loyalty Point Rules, a customer can qualify for multiple bonus rules.

To set up a bonus rule, complete the following instructions:

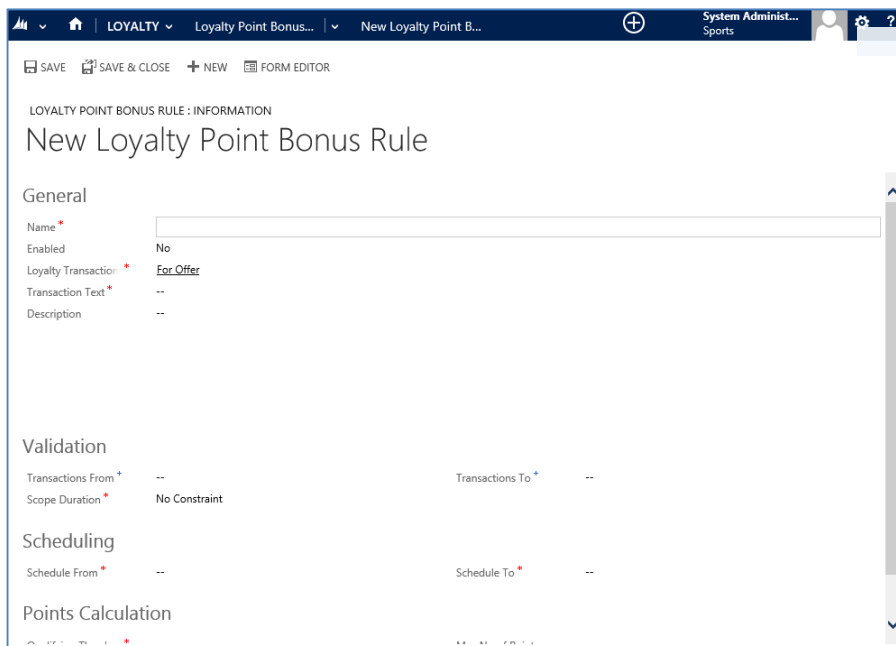
- a) With the [Loyalty Transaction Source](#) record open, select the small arrow next to the name of the Loyalty Transaction Source in the navigation bar and from the drop down choose **Loyalty Point Bonus Rules**.



- b) The Loyalty Point Bonus Rule Associated view will be displayed. Select **Add New Loyalty Point Bonus Rule** on the ribbon.



- c) A New Loyalty Point Bonus Rule form will be displayed, complete the following details:



General:

- **Name.** Enter the name of the Loyalty Points Bonus Rule. It is recommended that you use descriptive names that help other users to identify the purpose of the rule.
- **Enabled.** The rule should only be enabled when the details of the rule are finalised. Once the rule is no longer in use, for example the fixture the rule applies to has passed, the status should be changed back to disabled.
- **Loyalty Transaction Source.** The [Transaction Source](#) will automatically be set to the source selected when the new rule form was opened.
- **Transaction Text.** Enter the text that will appear on the loyalty statement when the rule is applied to a loyalty account. As the transaction text will be displayed on the loyalty statement viewed by the account holder via the loyalty portal, it is important to ensure the text entered is meaningful.
- **Description.** Enter a description of the rule.

Validation:

- **Transactions From.** Enter the start of the time frame transactions must occur in order to qualify for Loyalty Points. This can be left blank if the rule applies to a specific fixture/event.
- **Transactions To.** Enter the end time frame transactions must occur in order to qualify for loyalty points. This field can be left blank if the rule applies to a specific fixture or event.
- **Scope Duration.** Only used if you are awarding points for spend over a certain fixed period such as a calendar month. In that case you select the relevant period e.g. month, year.

Scheduling:

- **Schedule From.** Enter the date from which the rule will run at the frequency specified in the batch scheduler. This must be after the transactional information has been received.
- **Schedule To.** Enter the date which the rule will run to, at the frequency specified in the batch scheduler.

Points Calculation:

- **Qualifying Threshold.** The qualifying threshold indicates either how early you have to arrive at a fixture (if rewarding early attendance), how much you have to spend or how many you have to buy (if rewarding shop purchases).
- **Qualifying Unit.** Enter the qualifying unit. For example if points are awarded for every pound spent enter 1. Alternatively if points are awarded for every two shirts bought, enter 2.
- **Max No of Points per Transaction.** Enter the maximum number of points an account can be awarded for a single transaction.
- **Points per Unit.** Enter the points awarded per qualifying unit, i.e. if the customer is awarded one point for every pound spent enter 1 in the qualifying unit and 1 in the points per unit fields.

d) When the details are complete select **Save & Close** on the ribbon.

EXAMPLE OF LOYALTY BONUS RULES RECORD CREATED

To set up tiered points for early arrival set up the following:

Field Names	Early Attendance (30mins) Match 250 V Green 4 United	Early Attendance (60mins) Match 250 V Green 4 United
Rule Type	Loyalty Rule	Bonus Rule
Description	Early Attendance Bonus of 100 points if arriving 30 mins prior to the event / match	Early Attendance Bonus of 100 points if arriving 60 mins prior to the event / match
Transaction Text	Early Attendance	Early Attendance
Match Code	250	250
Qualifying Threshold	29	59
Qualifying Unit	1	1
Max No of Points Per Transaction	100	100
Points Per Unit	100	100

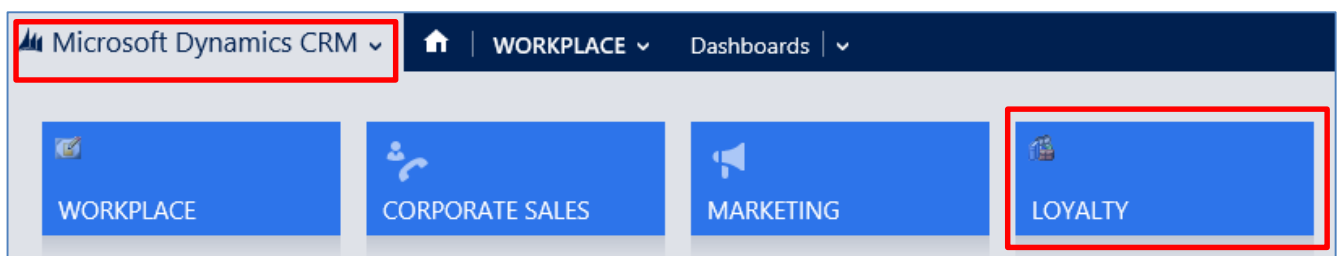
In the example above all customers arriving at the match 30 minutes early for the Fixture will receive 100 loyalty points (based on the [Loyalty Rule](#)). Anyone arriving 60 minutes early for the match will receive an additional 100 Loyalty Points (based on the [Loyalty Bonus Rule](#)).

5. LOYALTY REWARDS

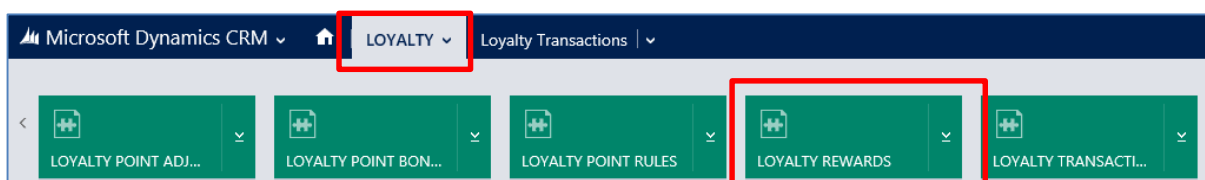
When you have set up your [Loyalty Accounts](#) and [Rules](#), you can start to offer rewards to account holders. Rewards are the offers the account holder can use to redeem their loyalty points against, for example opportunities to attend a closed door training session, meet the manager, etc. The loyalty rewards will be available to purchase via the loyalty portal.

To set up a loyalty reward, complete the following instructions:

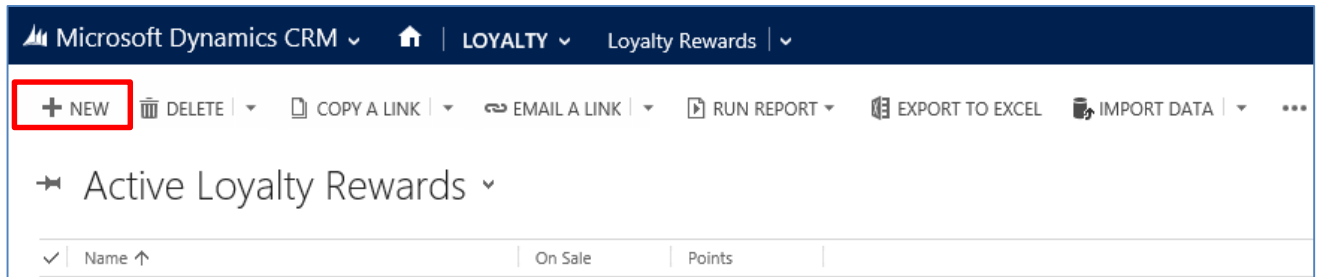
- In CRM, select or hover over the **Microsoft Dynamics CRM** tab in the navigation bar and from the drop down choose **Loyalty**.



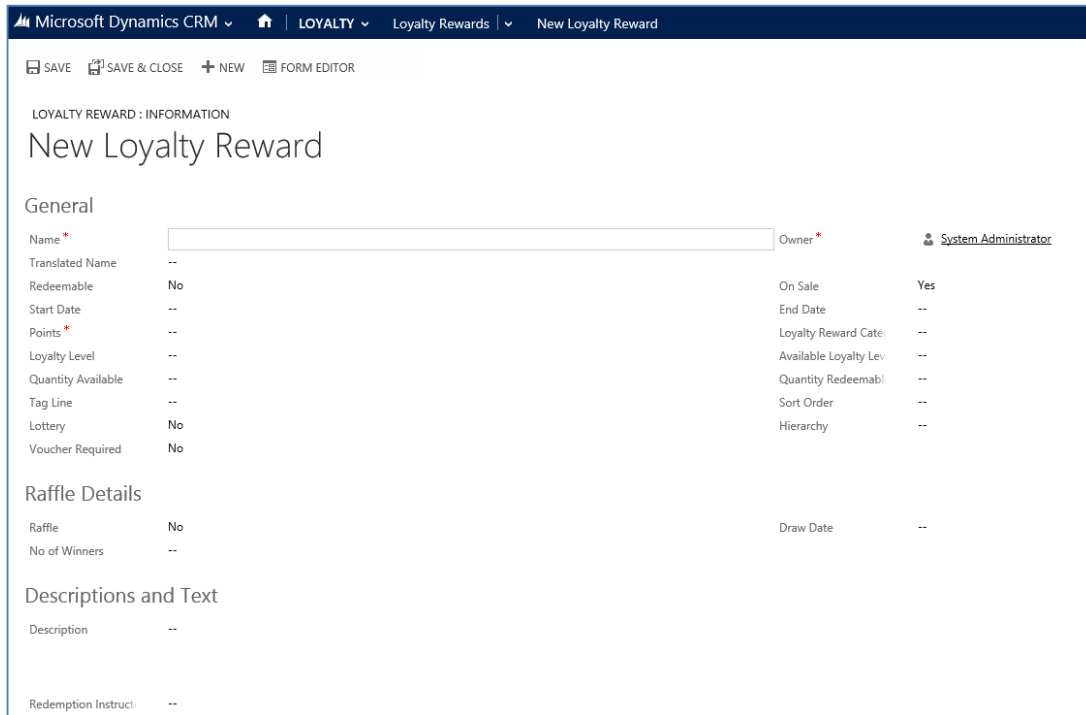
- Select the **Loyalty** tab in the navigation bar and from the drop down scroll across before choosing **Loyalty Rewards**.



c) A list of Active Loyalty Rewards will be displayed, select **New** on the ribbon.



d) A New Loyalty Reward form will be displayed, complete the following details:



General:

- **Name.** Enter a name for the reward. The Name will be displayed as the title for the item on the loyalty portal.
- **Translated Name.** This field is used for translation purposes.
- **Redeemable.** Select **Yes** if the item can be redeemed. If this flag is set as **No**, but the On Sale flag is set to **Yes** the item will appear on the portal, but customers will not be able to redeem points against the item.
- **Start Date.** Enter the date/time that reward becomes available for people to start redeeming their points. This field works in conjunction with the **On Sale** field as the reward must be On Sale to be redeemed.
- **Points.** Enter the number of loyalty points the reward will cost. The points' value will be shown as the "cost" of the item on the loyalty portal.
- **Loyalty Level.** If the reward is only available to people at a particular tier, enter the [Loyalty Level](#) that the reward is available for.
- **Quantity Available.** Enter the quantity available.
- **Tag Line.** Not used

- **Lottery.** Select **Yes** if the reward relates to a lottery. This can then be used to split the Rewards and Lotteries onto separate pages on the portal if required.
- **Voucher Required.** Select **Yes** if the reward requires a voucher to be sent to the person redeeming the reward. An automated email can then be configured so that when the reward is redeemed, a voucher is generated and an email can then be sent to the redeemer with the voucher details on.
- **Owner.** The currently logged in user's name will automatically be entered.
- **On Sale.** Select **Yes** if the reward is currently on sale via the Loyalty portal.
- **End Date.** Enter the date/time the reward will be taken off sale.
- **Loyalty Reward Category.** If required use the Lookup records to select a Category.
- **Available Loyalty Levels.** This is used in conjunction with the **Loyalty Level field**. If you had Bronze, Silver, Gold and Platinum levels and it was required to make the reward only available to Platinum level you would set this field to **This Level Only**. If you wanted the reward to be available to Silver, Gold and Platinum then you would set this field to **This Level and Above**.
- **Quantity Redeemable Per Account.** Enter the maximum number of rewards which can be redeemed by a single account.
- **Sort Order.** Not used.
- **Hierarchy.** Not used

Raffle Details:

- **Raffle.** Used for identifying if the Reward relates to a Raffle. This will then be used in the system messaging upon redemption to determine if the Reward Redemption message or the Raffle Redemption message is displayed. Select **Yes** or **No** if this reward relates to a Raffle or not.
- **No of Winners.** If using a Raffle, enter how many winners of that raffle there can be.
- **Draw Date.** Enter the date that the Raffle will be drawn.

Descriptions and Text:

- **Description.** Enter a description of the reward. The description should be entered as HTML (as shown in the example below). The description will be displayed on the loyalty account.

Description	<pre><p>Spend the day with the Huddersfield Town First Team! On selected dates throughout the year, watch the players train then have lunch with the players at Town's Canalside Sports Complex training ground.</p> <p><i>Once you have redeemed your points you will be contacted by email and arrangements will be made. The day will always be a mid-week and during the daytime. Because training schedules are often arranged at short notice, every effort will be made to give you as much notice as possible as to the dates available, however this date could be cancelled at very short notice and if this happens, we shall endeavour to rearrange a new date.<i></p></pre>
-------------	--

- **Redemption Instructions.** Enter a message to be displayed after a successful redemption. This could give information on how to obtain the reward/raffle item or how it will be dispatched. The description should be entered as HTML.
- **Expiry Text.** Enter the text to be displayed in place of the description when the End Date/Time has passed but the On Sale flag has not been set to No. The description should be entered as HTML.

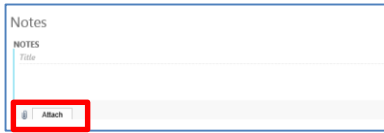
e) When the details are complete select **Save** on the ribbon.

ADDING AN IMAGE TO A LOYALTY REWARD

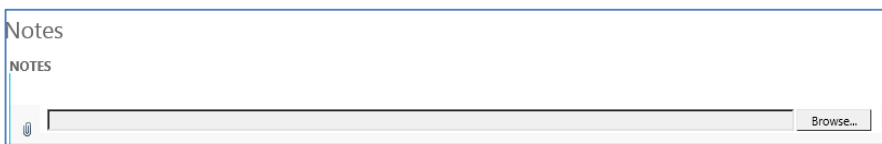
It is possible to add an image to a Loyalty Reward, which will then be displayed on the Loyalty Portal.

To add an image to a Loyalty Reward, complete the following instructions.

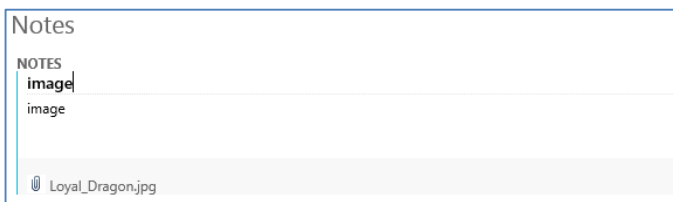
- a) In the Loyalty Reward form, scroll down to the Notes section.
- b) Click within the notes section and an Attach button will be displayed. Select **Attach**.



- c) This will display a Browse button, select **Browse** and search for the Loyalty Reward Image that is to be used.



- d) Upon selecting the image, it will become attached to the notes section. Give the note a title of **image**, whilst also writing **image** beneath the title in the description area.



- e) Select **Done** in the Notes area.
- f) When the details are complete select the **Save** icon in the bottom right hand corner of the screen.

EXAMPLE OF LOYALTY REWARD RECORDS CREATED

The table below shows the fields which have been completed in an example Loyalty Rewards Record form, created for this document. Please note the Loyalty Reward examples below have no start and end date, so will constantly be available and additionally there is no Loyalty Level, meaning the Rewards are available to all, not just those on a certain Loyalty Level

Record Type	Name	Redeemable	Points	Quantity Available	Lottery	Voucher Required	On Sale	Raffle
Loyalty Reward	Limited Addition Shirt	Yes	50	300	No	No	Yes	No
Loyalty Reward	Meet and Greet	Yes	100	20	No	No	Yes	No
Loyalty Reward	Behind the scenes tour	Yes	200	15	No	No	Yes	No

6. SEASON TICKET BUY-BACK. LOYALTY SET UP IN CRM

A key component of the Season Ticket Buy-Back functionality are loyalty points. A Season Ticket holder will gain a number of loyalty points, firstly depending on them having offered up their seat and secondly they gain an increased number of points if their seat is sold. A Season Ticket holder will not gain Loyalty Points until after the fixture has finished.

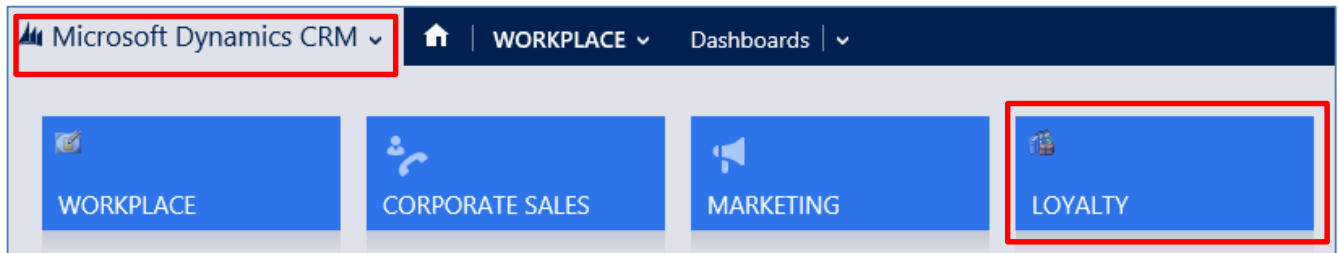
Consequently, loyalty needs to be set up on the CRM system to ensure that loyalty points are transferred to the customer. This is done by creating two [Loyalty Transaction Sources](#) and two sets of [Loyalty Point Rules](#) which the Loyalty Rule Transaction Generation process must be ran against.

Complete the following steps to set up Loyalty for Season Ticket Buy-Backs:

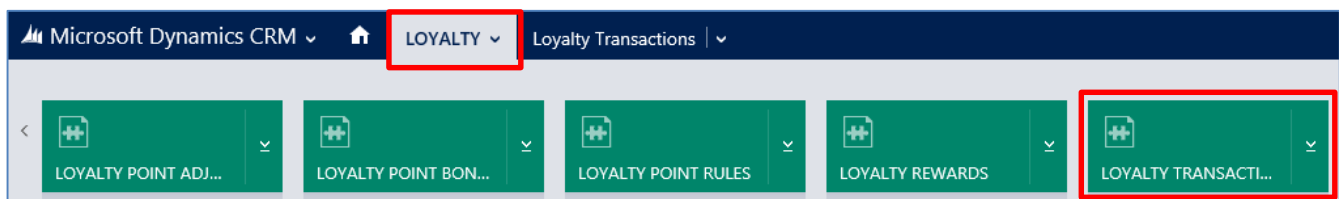
STEP 1. CREATE TWO LOYALTY TRANSACTION SOURCE RECORDS

Two Loyalty Transaction Source records must be created, one representing tickets that have been put on offer (**For Offer**) and the other for tickets that have been purchased (**For Purchase**). It must be noted that this setup is usually undertaken by Green 4 Solutions and New Loyalty Transaction Source records should only be created by users who have extensive understanding of SQL

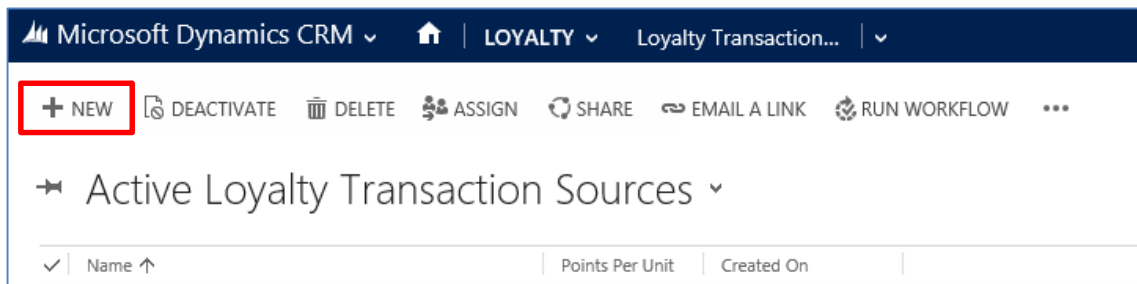
- a) In CRM, select or hover over the **Microsoft Dynamics CRM** tab in the navigation bar and from the drop down choose **Loyalty**.



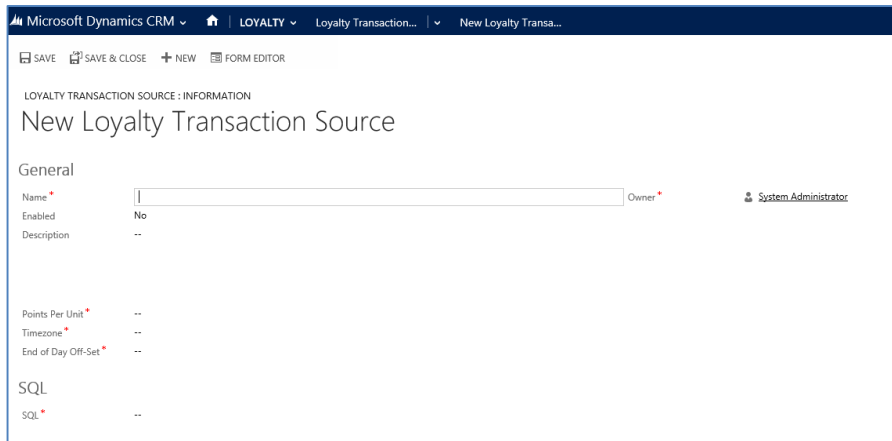
- b) Select the **Loyalty** tab in the navigation bar and from the drop down scroll across before choosing **Loyalty Transaction Sources**.



- c) A list of Active Loyalty Transaction Sources will be displayed, select **New** on the ribbon



d) A New Loyalty Transaction Source form will be displayed, complete the following details:



- **Name.** Name the first Loyalty Transaction Source: **For Offer.**
- **Owner.** The currently logged in user's name will be automatically entered.
- **Enabled.** Select **Yes.**
- **Description.** Enter a description of the source.
- **Points Per Unit.** Enter the number of points that will be awarded per unit, in this case, enter **1.**
- **Timezone.** Enter **0.**
- **End of Day Off-Set.** Enter **0.**
- **SQL.** Enter the below Loyalty Points calculation SQL script into the SQL field for the Loyalty Transaction Source named **For Offer.**

```

;with
cteBlocks
as
(
select distinct f.G4b_fixtureId, F.G4b_EndDateTime, b.g4b_BlockId, b.g4b_name as BlockName,
g4b_Loyaltyincrementpercentforbuyback,
isnull(g4b_Loyaltyincrementpercentforbuyback/100.0, 0)*isnull(f.g4b_Loyaltypointsforbuyback, 0) + isnull(f.g4b_Loyaltypointsforbuyback, 0) as g4b_Loyaltypointsforbuyback,
g4b_Percentagepointsforoffer,
g4b_Percentagepointsforpurchase,
G4b_StartDateTime
from G4b_blockExtensionBase b
inner join G4b_venueconfigurationblockExtensionBase vcb on b.G4b_blockId = vcb.g4b_blockid
inner join G4b_venueconfigurationExtensionBase vc on vcb.g4b_venueconfigurationid = vc.G4b_venueconfigurationId
inner join G4b_fixtureExtensionBase f on vc.g4b_venueid = f.g4b_venueid
where not(g4b_Loyaltypointsforbuyback is null)
and f.G4b_EndDateTime between @TransactionsFrom and @TransactionsTo
and f.G4b_EndDateTime < getdate()
),
cteP
as

```

```

(
select l.g4l_loyaltyaccountid,
ISNULL(l.G4L_PublicAccountNumber,') as G4L_PublicAccountNumber,
cast(round(g4b_Percentagepointsforoffer/100.0 * ( b.g4b_Loyaltypointsforbuyback), 0, 0) as int) Offer,
cast(round(isnull(case when g4b_Purchased = 1 then
g4b_Percentagepointsforpurchase/100.0 * b.g4b_Loyaltypointsforbuyback
end , 0), 0, 1) as int) as [Purchase],
B.G4b_StartDateTime TransactionDate,B.G4b_StartDateTime ActivityDate,
ISNULL(l.G4L_PublicAccountNumber,') + N'|'
+ cast(TFBB.g4b_ticketfixtiturebuybackId as nvarchar(36)) + N'|'
+ cast(pu.g4b_contactid as nvarchar(36)) Matchkey--Unique reference to ensure it is not processed twice, g4b_ticketfixtiturebuybackId
from cteBlocks B
inner join G4b_ticketfixturesExtensionBase TF on B.G4b_fixtureId = TF.G4b_FixtureId
inner join G4b_ticketfixturesBase TFB on TF.G4b_ticketfixtitureId = TFB.G4b_ticketfixtitureId
inner join G4B_ticketExtensionBase T on TF.G4B_TicketId = T.G4B_ticketId
inner join G4b_productuserExtensionBase pu on T.g4b_productuserid = pu.G4b_productuserid
inner join G4b_seatallocationExtensionBase sa on pu.g4b_seatallocationid = sa.G4b_seatallocationId and sa.g4b_blockid = B.G4b_blockId
inner join G4B_bookingExtensionBase B2 on sa.g4b_bookingid = B2.G4B_bookingId
inner join g4b_ticketfixtiturebuybackExtensionBase TFBB on TF.G4b_ticketfixtitureId = TFBB.g4b_TicketFixtureId
inner JOIN G4L_loyaltyaccountExtensionBase I ON pu.g4b_contactid = I.g4l_accountholderid
where TFB.statecode = 0
and B2.G4b_BookingStatus = 1
)

INSERT #Transactions (LAID, AccountReference,VALUE,TransactionDate,ActivityDate,Matchkey)
select G4L_loyaltyaccountid, G4L_PublicAccountNumber, [value], TransactionDate, ActivityDate, LoyaltyType + '|' + Matchkey
from cteP
unpivot
(
[value] for LoyaltyType in([Offer])
) p
where value <> 0

```

e) Select **Save and Close** on the ribbon.

f) Next, the process above (Letters a-e) must be repeated for another Loyalty Transaction Source to be created. Open a new **Loyalty Transaction Source** form, before completing the form with the following detail:

- **Name.** Name the first Loyalty Transaction Source: **For Purchase.**
- **Owner.** The currently logged in user's name will be automatically entered.
- **Enabled.** Select **Yes.**
- **Description.** Enter a description of the source.
- **Points Per Unit.** Enter the number of points that will be awarded per unit, in this case, enter **1.**

- **Timezone.** Enter **0**.
- **End of Day Off-Set.** Enter **0**.
- **SQL.** Enter the below Loyalty Points calculation SQL script into the SQL field for the Loyalty Transaction Source named **For Purchase**. Please note that this SQL script differs to that of the script placed in the On Offer Loyalty Transaction Source form.

```

;with
cteBlocks
as
(
select distinct f.G4b_fixtureId, F.G4b_EndDateTime, b.g4b_BlockId, b.g4b_name as BlockName,
g4b_Loyaltyincrementpercentforbuyback,
isnull(g4b_Loyaltyincrementpercentforbuyback/100.0, 0)*isnull(f.g4b_Loyaltypointsforbuyback, 0) + isnull(f.g4b_Loyaltypointsforbuyback, 0) as g4b_Loyaltypointsforbuyback,
g4b_Percentagepointsforoffer,
g4b_Percentagepointsforpurchase,
G4b_StartDateTime
from G4b_blockExtensionBase b
inner join G4b_venueconfigurationblockExtensionBase vcb on b.G4b_blockId = vcb.g4b_blockid
inner join G4b_venueconfigurationExtensionBase vc on vcb.g4b_venueconfigurationid = vc.G4b_venueconfigurationId
inner join G4b_fixtureExtensionBase f on vc.g4b_venueid = f.g4b_venueid
where not(g4b_Loyaltypointsforbuyback is null)
and f.G4b_EndDateTime between @TransactionsFrom and @TransactionsTo
and f.G4b_EndDateTime < getdate()
),
cteP
as
(
select l.g4l_loyaltyaccountid,
ISNULL(l.G4L_PublicAccountNumber, '') as G4L_PublicAccountNumber,
cast(round(g4b_Percentagepointsforoffer/100.0 * ( b.g4b_Loyaltypointsforbuyback), 0, 0) as int) Offer,
cast(round(isnull(case when g4b_Purchased = 1 then
g4b_Percentagepointsforpurchase/100.0 * b.g4b_Loyaltypointsforbuyback
end , 0), 0, 1) as int) as [Purchase],
B.G4b_StartDateTime TransactionDate, B.G4b_StartDateTime ActivityDate,
ISNULL(l.G4L_PublicAccountNumber, '') + N'|'
+ cast(TFBB.g4b_ticketfixturebuybackId as nvarchar(36)) + N'|'
+ cast(pu.g4b_contactid as nvarchar(36)) Matchkey--Unique reference to ensure it is not processed twice, g4b_ticketfixturebuybackId
from cteBlocks B
inner join G4b_ticketfixturesExtensionBase TF on B.G4b_fixtureId = TF.G4b_FixtureId
inner join G4b_ticketfixturesBase TFB on TF.G4b_ticketfixturesId = TFB.G4b_ticketfixturesId
inner join G4b_ticketExtensionBase T on TF.G4b_TicketId = T.G4b_ticketId
inner join G4b_productuserExtensionBase pu on T.g4b_productuserid = pu.G4b_productuserid
inner join G4b_seatallocationExtensionBase sa on pu.g4b_seatallocationid = sa.G4b_seatallocationId and sa.g4b_blockid = B.G4b_blockid

```

```

inner join G4B_bookingExtensionBase B2 on sa.g4b_bookingid = B2.G4B_bookingId
inner join g4b_ticketfixturebuybackExtensionBase TFBB on TF.G4b_ticketfixturesId = TFBB.g4b_TicketFixtureId
inner JOIN G4L_loyaltyaccountExtensionBase l ON pu.g4b_contactid = l.g4l_accountholderid
where TFB.statecode = 0
and B2.G4b_BookingStatus = 1
)

INSERT #Transactions (LAID, AccountReference,VALUE,TransactionDate,ActivityDate,Matchkey)
select G4L_loyaltyaccountid, G4L_PublicAccountNumber, [value], TransactionDate, ActivityDate, LoyaltyType + '|' + Matchkey
from cteP
unpivot
(
[value] for LoyaltyType in([Purchase])
) p
where value <> 0

```

g) Select **Save and Close** on the ribbon.

EXAMPLE OF LOYALTY TRANSACTION SOURCE RECORDS CREATED FOR SEASON TICKET BUY-BACK

The table below shows the two Loyalty Transaction Source records and the mandatory fields that must be set up for Season Ticket Buy-Backs.

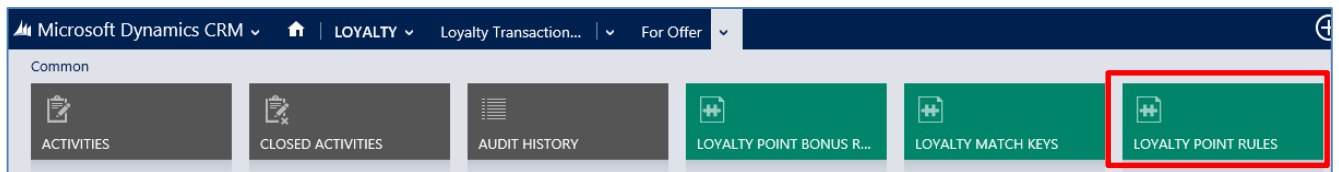
Record Type	Name	Enabled	Points Per Unit	Timezone	End of Day Off-Set	SQL
Loyalty Transaction Source	For Offer	Yes	1.00	0	0	Enter the applicable SQL script listed above
Loyalty Transaction Source	For Purchase	Yes	1.00	0	0	Enter the applicable SQL script listed above

STEP 2. CREATE TWO LOYALTY POINT RULES

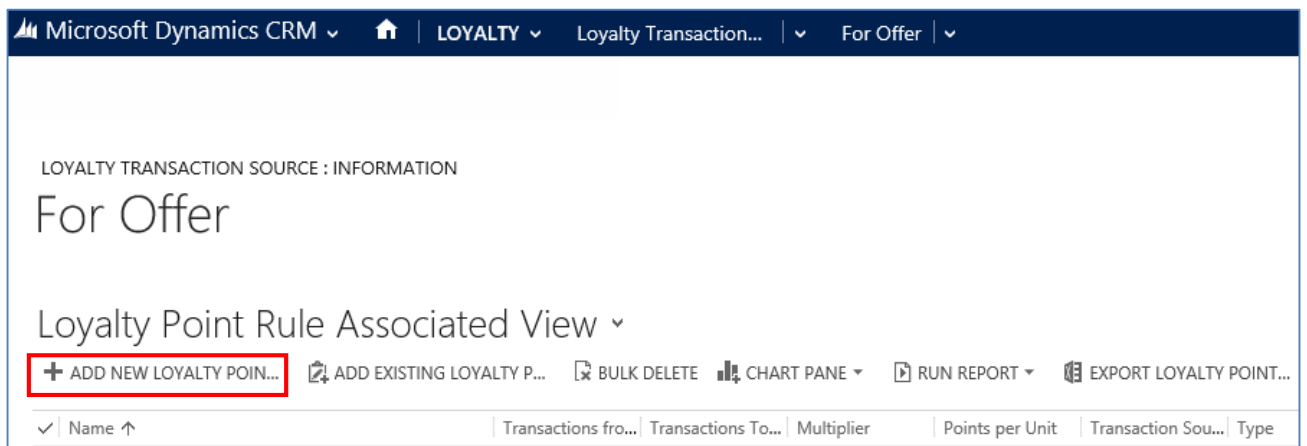
When the two [Loyalty Transaction Source](#) records (For Offer and For Purchase) have been set up, two Loyalty Point Rules will need to be created. The Loyalty Point Rules determine when points are going to be awarded to the account holder. In this example the Loyalty Point rule will be used to identify when a ticket has been put on offer and if the offered up ticket has been purchased.

To set up the two Loyalty Points Rules needed for Season Ticket Buy-Backs complete the following:

- Open up the **For Offer** Loyalty Transaction Source record that was created in Step 1.
- On the navigation bar, select the small arrow next to the name of Loyalty Transition Source and from the drop down choose **Loyalty Point Rules**



- The Loyalty Point Rule Associated View will be displayed, select **Add New Loyalty Point Rule** on the ribbon.



- A new **Loyalty Point Rule** form will be displayed. Complete the following:

This screenshot shows the 'New Loyalty Point Rule' form. The form is titled 'New Loyalty Point Rule' and is divided into several sections:

- Execution Details:** Includes fields for 'Execution Frequen*' (with a dropdown set to 24), 'Enabled' (radio buttons for 'Enabled' and 'No'), 'Execution Start', 'Execution End', and 'Last Executed'.
- General:** Includes fields for 'Name*', 'Description', 'Owner*' (set to 'System Administrator'), and 'Transaction Text*'. The 'Transaction Source' is set to 'For Offer' and 'Type' is set to '--'.
- Validation:** Includes fields for 'Transactions from', 'Match Code', and 'Transactions To'.

Execution Details:

- **Execution Frequency in Hours.** Enter the frequency in hours, the rule should run.
- **Execution Start.** Enter the date and time that the rule is first required to run.
- **Last Executed.** This field will automatically update with the date and time the rule was last run.
- **Enabled.** Set the flag to **Yes** to enable the rule.
- **Execution End.** If applicable, enter the end date and time of the rule.

General

- **Name.** Enter a name for the Loyalty Points rule, for example **Buy-back offer**.
- **Description.** Enter a description of the rule.
- **Transaction Text.** Enter the text that will appear on the loyalty statement when the rule is applied to a Loyalty Account. As the transaction text will be displayed on the loyalty statement viewed by the account holder via the loyalty portal, it is important to ensure the text entered is meaningful. For example **Points for Offer**.
- **Transaction Source.** The [Transaction Source](#) will automatically be set to the source selected when the new rule form was opened, this being **For Offer**
- **Owner.** The currently logged in user's name will automatically be entered.
- **Type.** If applicable, enter the type of [Loyalty Card](#) the rule will be applied to. Only Loyalty Accounts with the appropriate loyalty card type listed will have points applied when the rule is run. If the loyalty rule is not limited to one card type leave this field blank.

Points Calculation

- **Qualifying Unit.** Enter the Qualifying Unit. The value will be used by the Loyalty Transaction Source SQL. The number **1** should be entered.
- **Points per Unit.** Enter the points awarded per qualifying unit, the number **1** should be entered.
- **Contribute To Level.** Select **Yes or No** if the rule is to contribute to a [Loyalty Level](#) or not.

Points Expiration:

- **Expiration Date.** Enter the date after which all unused points accrued will expire.
- **Expiration Days.** Enter the number of days before any unused points generated from this rule will expire.



Note: Any other fields that are not displayed above do not need to be changed or completed.

- e) When the details are complete select **Save & Close** on the ribbon.
- f) The steps above must now be repeated for the second [Loyalty Transaction Source](#) that was created in [Step 1](#) called **For Purchase**. With the Active Loyalty Transaction Sources displayed, open up the **For Purchase** Loyalty Transaction Source.
- g) On the navigation bar, select the small arrow next to the name of Loyalty Transition Source and from the drop down choose **Loyalty Point Rules**

- h) The Loyalty Point Rule Associated View will be displayed, select **Add New Loyalty Point Rule** on the ribbon.
- i) A new Loyalty Point Rule form will be displayed. Complete the following:

Execution Details:

- **Execution Frequency in Hours.** Enter the frequency in hours that the rule should run.
- **Execution Start.** Enter the date and time that the rule is first required to run.
- **Last Executed.** This field will automatically update with the date and time the rule was last run.
- **Enabled.** Set the flag to **Yes** to enable the rule.
- **Execution End.** If applicable, enter the end date and time of the rule.

General

- **Name.** Enter a name for the Loyalty Points rule, for example **Buy-back purchase**.
- **Description.** Enter a description of the rule.
- **Transaction Text.** Enter the text that will appear on the loyalty statement when the rule is applied to a Loyalty Account. As the transaction text will be displayed on the loyalty statement viewed by the account holder via the loyalty portal, it is important to ensure the text entered is meaningful. For example **Tickets Purchased**.
- **Transaction Source.** The [Transaction Source](#) will be automatically set to the source selected when the new rule form was opened, this being **For Purchase**.
- **Owner.** The currently logged in user's name will be automatically entered.
- **Type.** If applicable, enter the type of [Loyalty Card](#) the rule will be applied to. Only Loyalty Accounts with the appropriate loyalty card type listed will have points applied when the rule is run. If the loyalty rule is not limited to one card type leave this field blank.

Points Calculation

- **Qualifying Unit.** Enter the Qualifying Unit. The value will be used by the Loyalty Transaction Source SQL. The number **1** should be entered.
- **Points per Unit.** Enter the points awarded per qualifying unit, the number **1** should be entered.
- **Contribute To Level.** Select **Yes or No** if the rule is to contribute to a level or not.

Points Expiration:

- **Expiration Date.** Enter the date after which all unused points accrued will expire.
- **Expiration Days.** Enter the number of days before any unused points generated from this rule will expire.



Note: Any other fields that are not displayed above do not need to be changed or completed.

- j) When the details are complete select **Save & Close** on the ribbon.

EXAMPLE OF LOYALTY POINT RULE RECORDS CREATED FOR SEASON TICKET BUY-BACK

The table below shows the two Loyalty Point Rule records and the mandatory fields that must be set up for Season Ticket Buy-Backs.

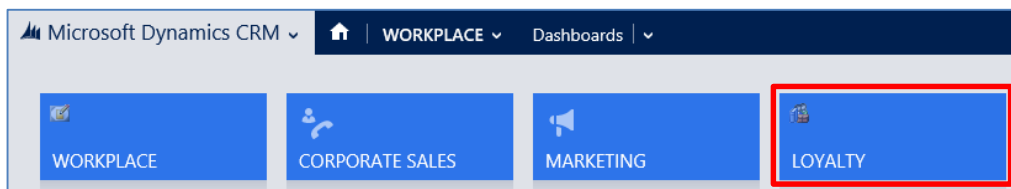
Record Type	Execution Frequency	Execution Start	Enabled	Name	Transaction Text	Transaction Source	Qualifying Unit	Points per Unit	Contribute To Level
Loyalty Point Rule	1	31/08/2015	Yes	Buy-Back Offer	Points for Offer	For Offer	1	1	Yes
Loyalty Point Rule	1	31/08/2015	Yes	Buy-Back Purchase	Points for Purchase	For Purchase	1	1	Yes

STEP 3. RUN THE LOYALTY RULE TRANSACTION GENERATION PROCESS

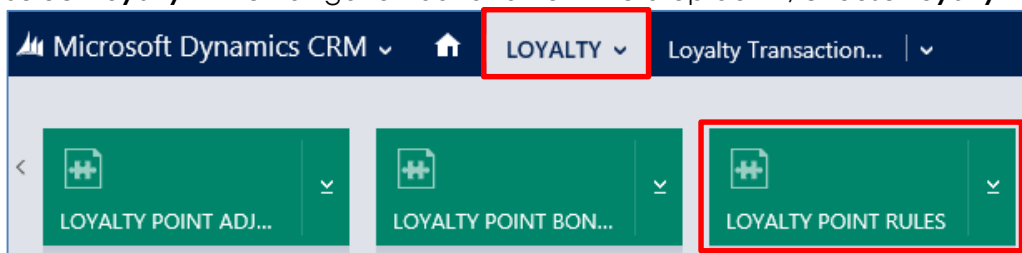
For each of the [Loyalty Point Rules](#) created the Loyalty Rule Transaction Generation process must be run.

To do this complete the following:

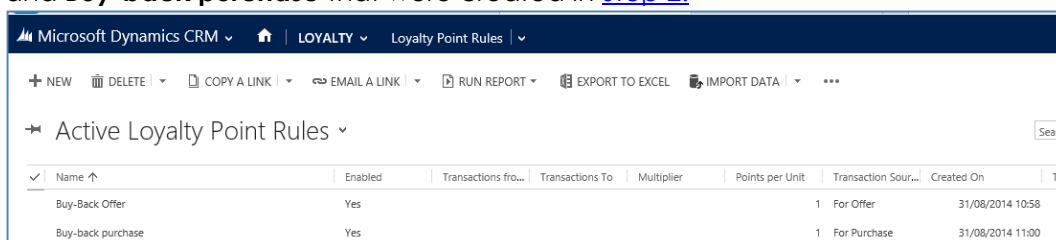
- a) In the navigation bar, select or hover over the **Microsoft Dynamics CRM** tab before choosing **Loyalty** from the drop down.



- b) Select **Loyalty** in the navigation bar and from the drop down, choose **Loyalty Points Rules**.

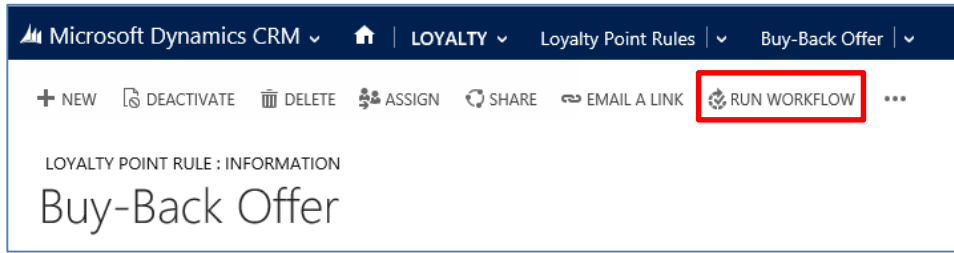


- c) The Active Loyalty Points Rules view will be displayed including the two rules called **Buy-back offer** and **Buy-back purchase** that were created in [Step 2](#).

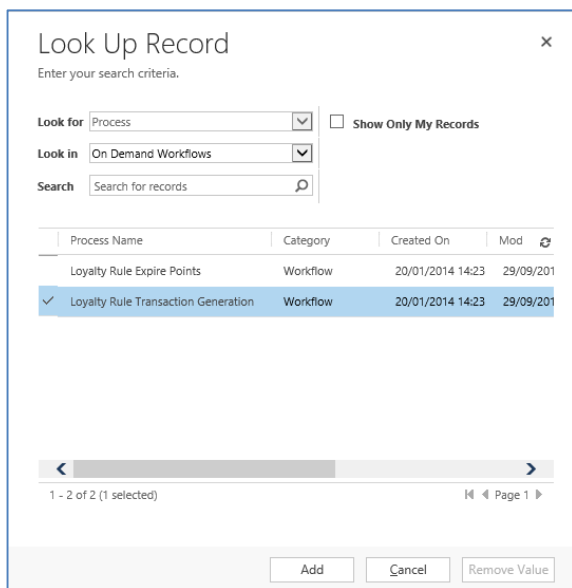


Name	Enabled	Transactions from...	Transactions To	Multiplier	Points per Unit	Transaction Sour...	Created On	Type
Buy-Back Offer	Yes				1	For Offer	31/08/2014 10:58	
Buy-back purchase	Yes				1	For Purchase	31/08/2014 11:00	

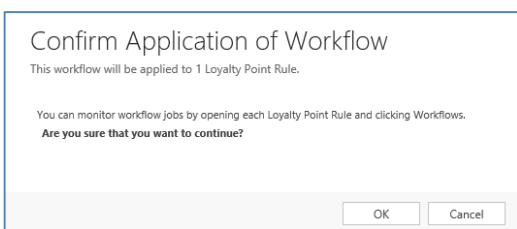
- d) For the two Loyalty Point Rules that have been created (Buy-Back offer and Buy-back purchase), open up each of the rules.
- e) Within each of the Loyalty Points Rules form select Run Workflow in the ribbon.



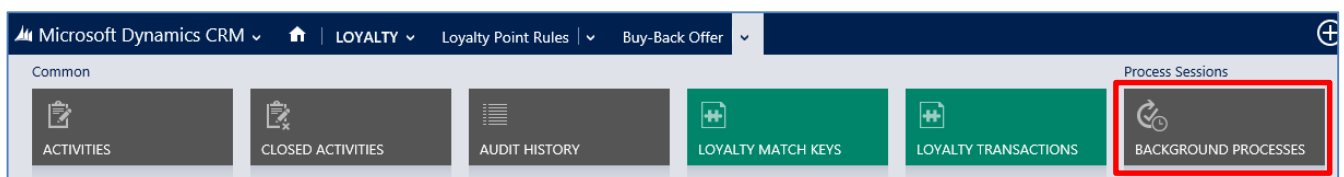
- f) A Look Up Records Dialogue will appear.
- g) Select the tick box next to the **Loyalty Rule Transaction Generation** before selecting **Add**.



- h) A Confirm Application of Workflow dialogue will be shown. Select **Ok**.



- i) The workflow will run for the set amount of time entered into the **Loyalty Points Rule** form. Details of the workflow can be found by selecting the small arrow next to the name of the Loyalty Points Rules form before choosing **Background Processes** from the drop down.



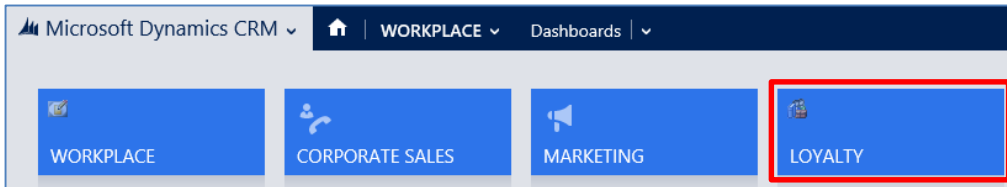
Note: Ensure that the Workflow has been run for both of the Loyalty Point Rules that were created.

STEP 4. CREATING A LOYALTY POINTS UPDATE

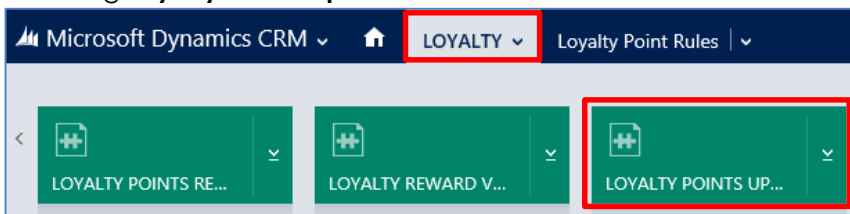
To ensure Loyalty Points are updating in a customer's [Loyalty Accounts](#) a workflow in the Loyalty Points Update must be created and then ran.

To do this complete the following:

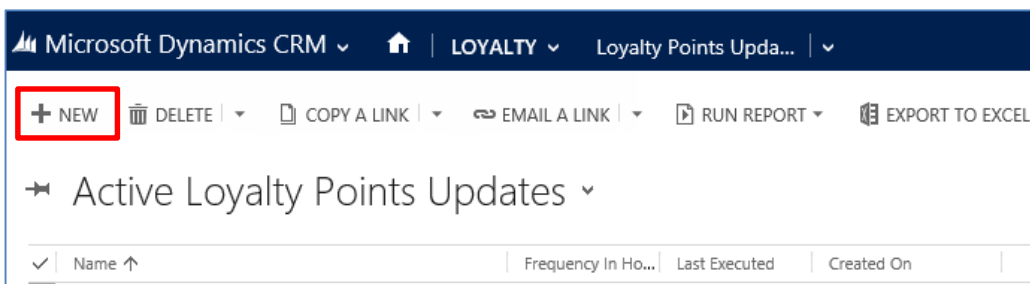
- a) In the navigation bar, select or hover over the **Microsoft Dynamics CRM** tab before choosing **Loyalty** from the drop down.



- b) Select **Loyalty** in the navigation bar and from the drop down, before scrolling across and choosing **Loyalty Points Updates**.



- c) The Active Loyalty Points Updates view will be displayed, select **New** on the ribbon.



- d) A new Loyalty Points Update form will be displayed, complete the following details:

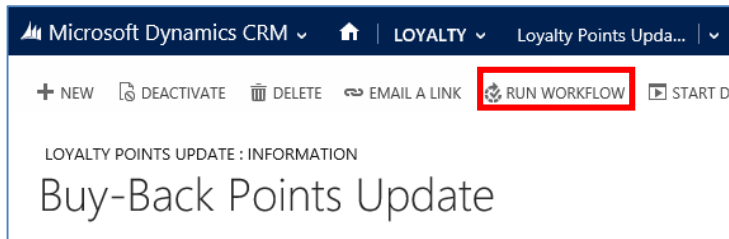
The screenshot shows the 'New Loyalty Points Update' form in Microsoft Dynamics CRM. The form has a 'Name' field and a 'Frequency in Hours' field. The 'Name' field is currently empty, and the 'Frequency in Hours' field is set to '--'. There is also a 'Next Execution' field.

- **Name.** Enter a name for the Loyalty Points Update such as Buy-Back Points Update.
- **Frequency in Hours.** Enter the frequency in hours that the workflow is to be run, for example 1.
- **Next Execution.** Enter the date and time of the next execution of the workflow.

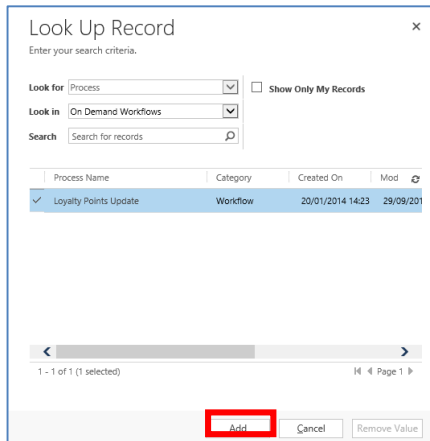
- e) Select **Save and Close** in the ribbon.

- f) Reopen the Loyalty Points Update that has been created.

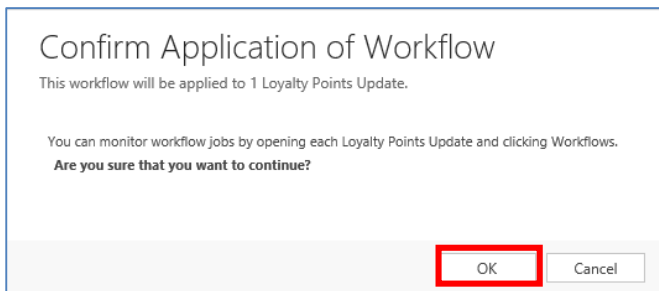
- g) In the ribbon select **Run Workflow**.



h) A **Look Up Record** dialogue will appear, place a tick in the **Loyalty Points Update** checkbox and select **Add**.



i) A new window will be shown asking to confirm the Workflow. Select **Ok**.



j) The Workflow will then be run. Select the **Save** icon in the bottom right hand corner of the form.

EXAMPLE OF LOYALTY POINT UPDATE RECORD CREATED FOR SEASON TICKET BUY-BACK

The table below shows the Loyalty Update record and the mandatory fields that must be set up for Season Ticket Buy-Backs.

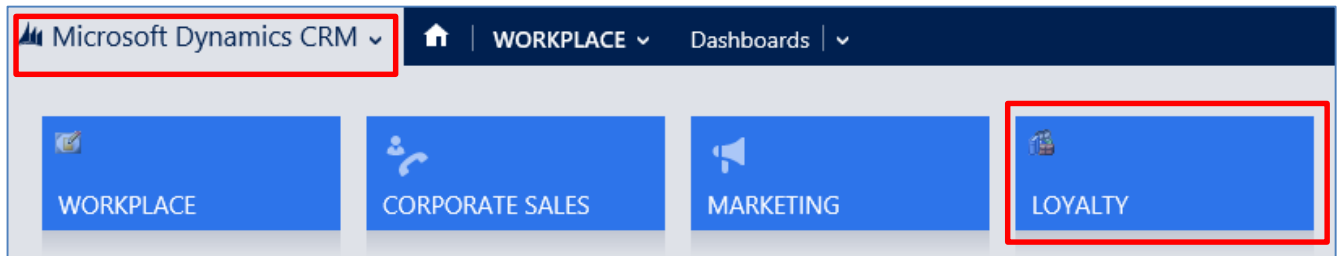
Record Type	Name	Frequency in Hours	Next Execution
Loyalty Point Rule	Buy-Back Points Update	1	03/11/2015

7. AUCTION ITEMS

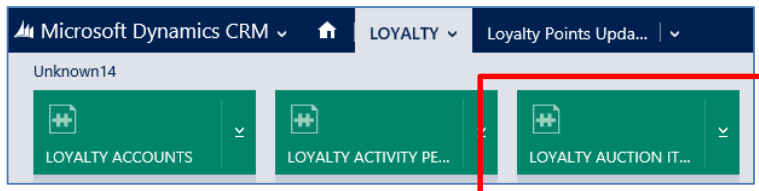
Loyalty Account holders can use their loyalty points to bid in loyalty auctions. Auction items are placed on the loyalty portal for a set period of time to allow the [Loyalty Account](#) holders time to bid. Once bidding has closed the points will be redeemed against the appropriate account depending on whether the auction was set up as a “highest bid wins” auction or a “raffle” auction, where all bidders lose a predefined number of points. Auctions are also set up to be either Closed or Open. Closed Auctions are where you cannot see what the current highest bid is whereas Open Auctions it is possible to see the current highest bid.

To set up an Auction Item, complete the following instructions:

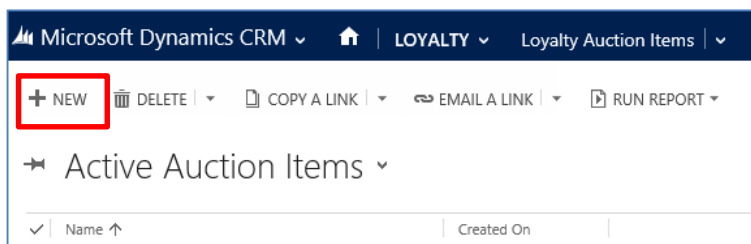
- a) In CRM, select or hover over the **Microsoft Dynamics CRM** tab in the navigation bar and from the drop down choose **Loyalty**.



- b) Select the Loyalty tab in the navigation bar and from the drop down choose **Loyalty Auction Items**.



- c) The Active Auction Items view will be displayed, select **New** in the ribbon.



- d) A New Loyalty Auction Items form will be displayed, complete the following details.

- **Name.** Enter a name for the auction item. This will be displayed as the title on the auction site.
- **Translated Name.** This field can be used for translation purposes.
- **Valid From.** Enter the date the auction period starts. An Auction Item must have a valid from date in order to appear on the loyalty portal.
- **Minimum Bid.** Enter the minimum bid allowed.
- **Description.** Enter a description of the auction item. This will be displayed on the auction site.
- **Tag Line.** Not used.
- **Image Quantity.** Not used.
- **Open Auction.** Select **Yes** if the current highest bid is to be shown alongside the auction. If this option is set to **No** the auction will be run as a blind auction.
- **Owner.** The currently logged in user's name will be automatically entered.
- **Valid To.** Enter the date the auction period ends. An auction item must have a valid from date in order to appear on the loyalty website.
- **Maximum Bid.** Enter the maximum bid allowed. This field should be left blank if unlimited bidding is allowed. If the auction is to be run as a raffle the minimum and maximum bids should be set to the same value.
- **Hierarchy.** Not used.
- **Image Folder Name.** Not used.

e) When the details are complete select **Save & Close** on the ribbon.

EXAMPLE OF AN AUCTION ITEM RECORD CREATED

The table below shows the fields that have been completed in an example Auction Item Record form that has been created for this document.

Record Type	Name	Valid From	Minimum Bid	Description-Long	Open Auction	Valid To
Auction Item	Signed match shirt	22/06/2015	50.00	Bid for the chance to be the owner of a Signed match shirt	Yes	22/07/2015

8. LOYALTY CODES

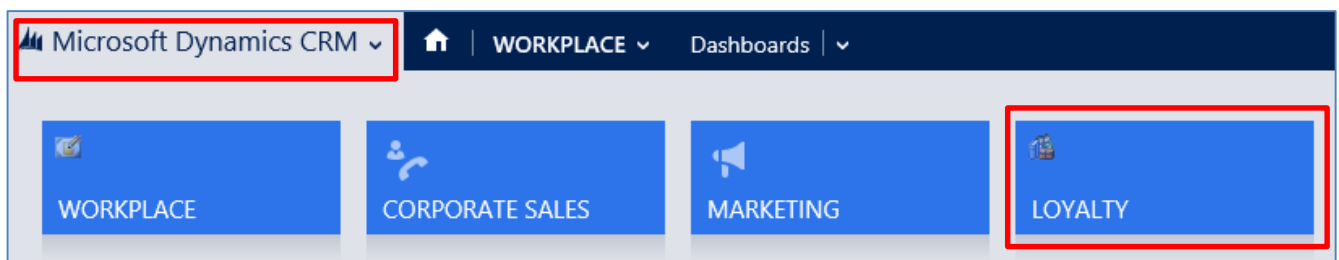
Loyalty Codes can be advertised for account holders to enter a code within a certain timescale to be awarded bonus points. Loyalty Codes allow the [Loyalty Account](#) holder to receive additional points by simply entering the code.

Examples may be:

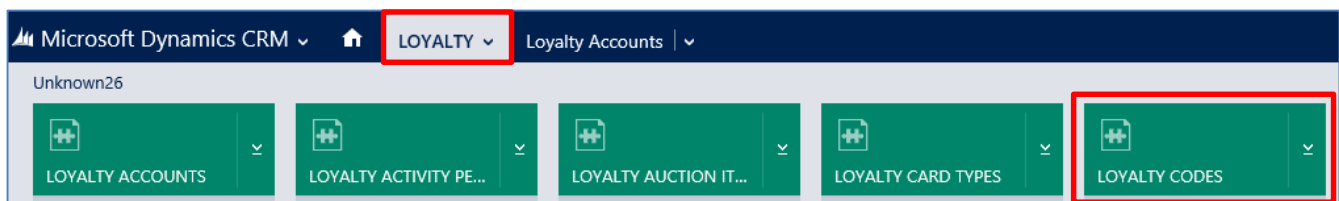
- For a televised Away game a code is shown on TV for users to enter on the portal. If they enter that code by a certain date and time (midday the following day for example) then they would get X bonus points (100 for example).
- A sponsor may print a code on the bottom of their receipts and if that Code is entered in the portal then X points are awarded.
- A code is included on communications messages to try to encourage recipients to read it. If they enter the code by a certain date/time then they get X bonus points.

To set up a Loyalty Code, complete the following instructions:

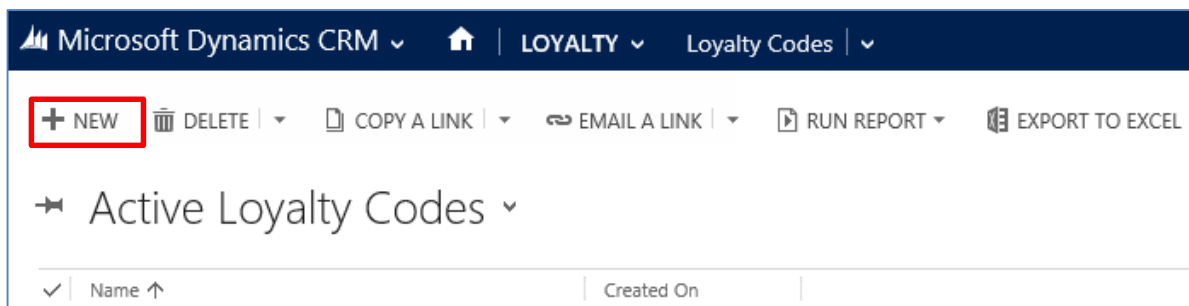
- a) In CRM, select or hover over the **Microsoft Dynamics CRM** tab in the navigation bar and from the drop down choose **Loyalty**.



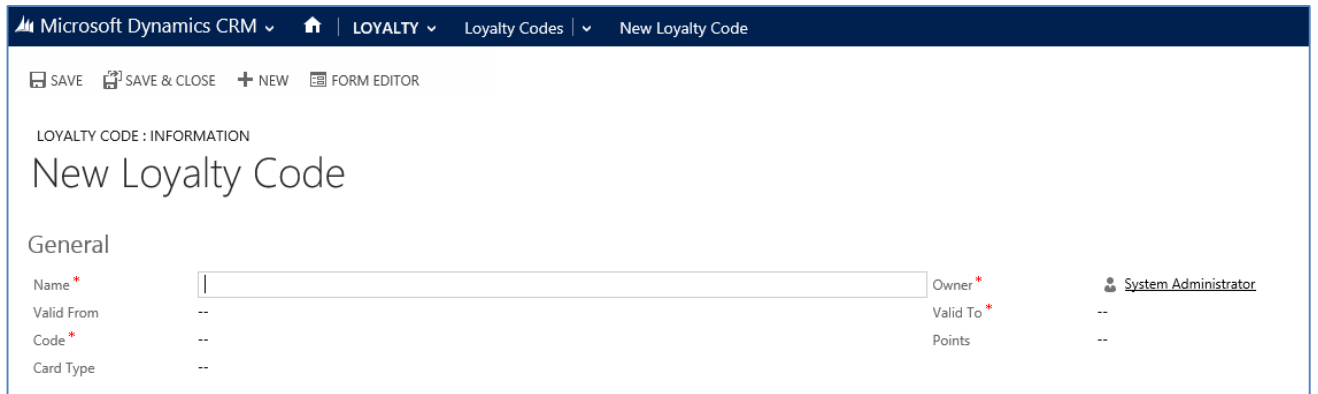
- b) Select the Loyalty tab in the navigation bar and from the drop down choose **Loyalty Code**



- c) The Active Loyalty Codes view will be displayed, select **New** on the ribbon.



d) A New Loyalty Code form will be displayed, complete the following details.



- **Name.** Enter the name of Loyalty Code. This will be displayed on the Loyalty Account statement.
- **Valid From.** Enter the date from which the code can be redeemed for points.
- **Code.** Enter the code the customer will need to enter on the Loyalty Portal to earn their additional points.
- **Card Type.** Enter the [Card Type](#) the code can be used with. If this field is left blank all card holders can use the code.
- **Owner.** Your CRM username will be automatically entered.
- **Valid To.** Enter the To date in which the code can be redeemed for points.
- **Points.** Enter the number of points the loyalty card holder will earn by entering the code.

e) When the details are complete select **Save and Close** on the ribbon.

EXAMPLE OF A LOYALTY CODE RECORD CREATED

The table below shows the fields which have been completed in an example Loyalty Code Record form that has been created for this document.

Record Type	Name	Valid From	Code	Valid to	Points
Loyalty Code	100 Bonus Points	22/06/2015	BONUS100	30/06/2015	100

END OF DOCUMENT