CRM DRIVEN SOLUTIONS FOR SPORT & LEISURE

GREEN 4 LOYALTY

USER GUIDE

CONTENTS

ABOUT THIS DOCUMENT

This document has been prepared as a User Guide for setting up Green 4 Loyalty.

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DOCUMENT CONTROL

Version	Date	Change	Initials
1.0	20/03/13	This is a new document	MR
1.1	06/09/13	Updated	MR
1.2	06/08/14	Updated	MR
1.3	10/11/14	Updated to include new fields and screen shots.	JW
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1. INTRODUCTION

The Green 4 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 can bid for items in a loyalty auction.

In return the users gain a greater insight into their customers. In addition they are able to monitor the actions of loyalty users, for example monitor when they arrive at games, which fixtures they attend, etc. Through this monitoring of actions, the user is able to target marketing campaigns and incentivise their customers.

This guide describes how to set up the Green 4 Loyalty module within Microsoft CRM.

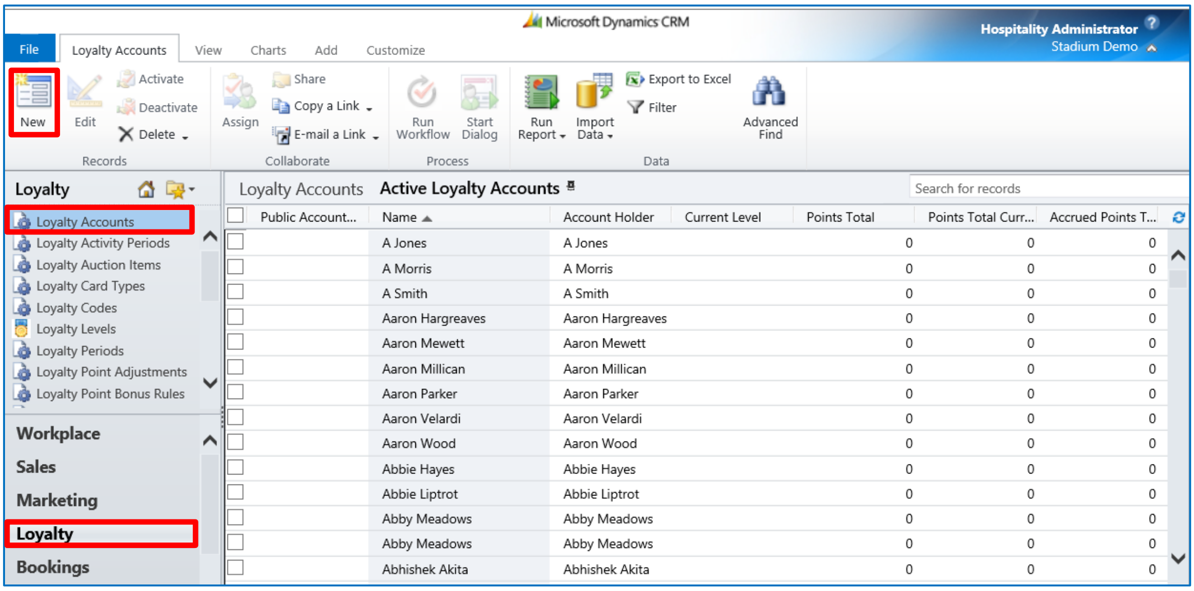
2. LOYALTY ACCOUNTS

Loyalty accounts can be set up for customers within the CRM database. Linked to a Loyalty Account a customer may have a number of Loyalty Cards. A loyalty card does not necessary reflect an actual card, but represents a unique identifier, for example a season ticket membership, supporters fan group membership, email address, etc.

A loyalty account will be automatically generated when a customer registers during the purchase of tickets through the Green 4 Ticketing site.

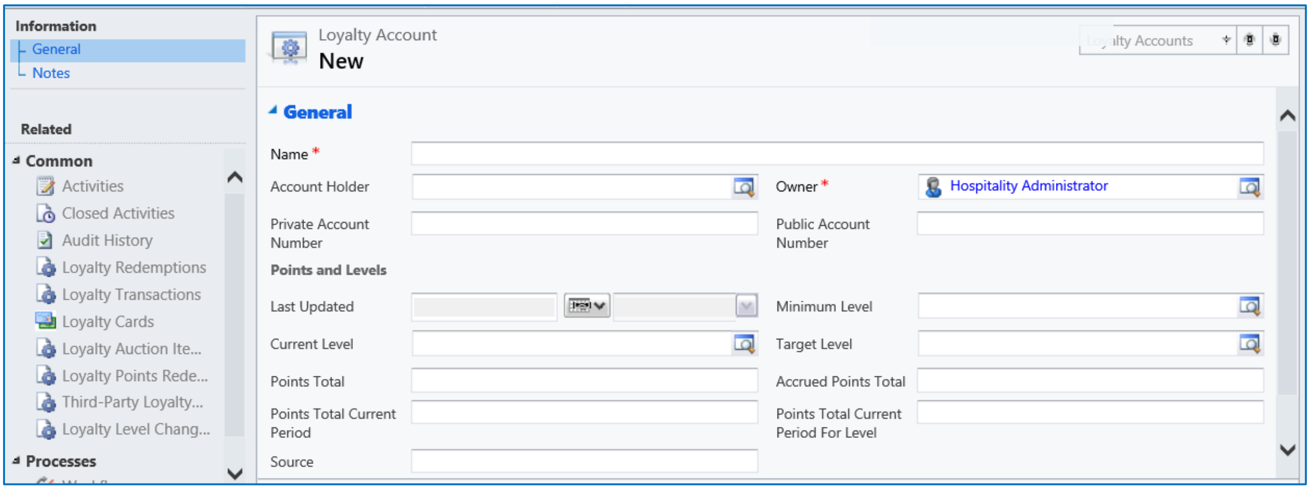
To manually create a loyalty account:

a) Select **Loyalty Accounts** on the **Loyalty** navigation panel. A list of existing loyalty accounts will be displayed.



b) To create a new record, select **New** on the ribbon.

c) A blank Loyalty Transaction Source form will be displayed:



d) 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 Lookup Records dialog to select the account holder from the list of contacts held in your database. When an 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 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.
- **Current Level.** Use the Lookup Records dialog to select the account holder's current loyalty level (if used).
- **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.** Use the Lookup Records dialogue to select the account holder's minimum loyalty level (if used).
- **Target Level.** Use the Lookup Records dialog to select the account holder's target loyalty level (if used).
- **Accrued Points Total.** The total number of points accrued by the account during all periods will be automatically 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.

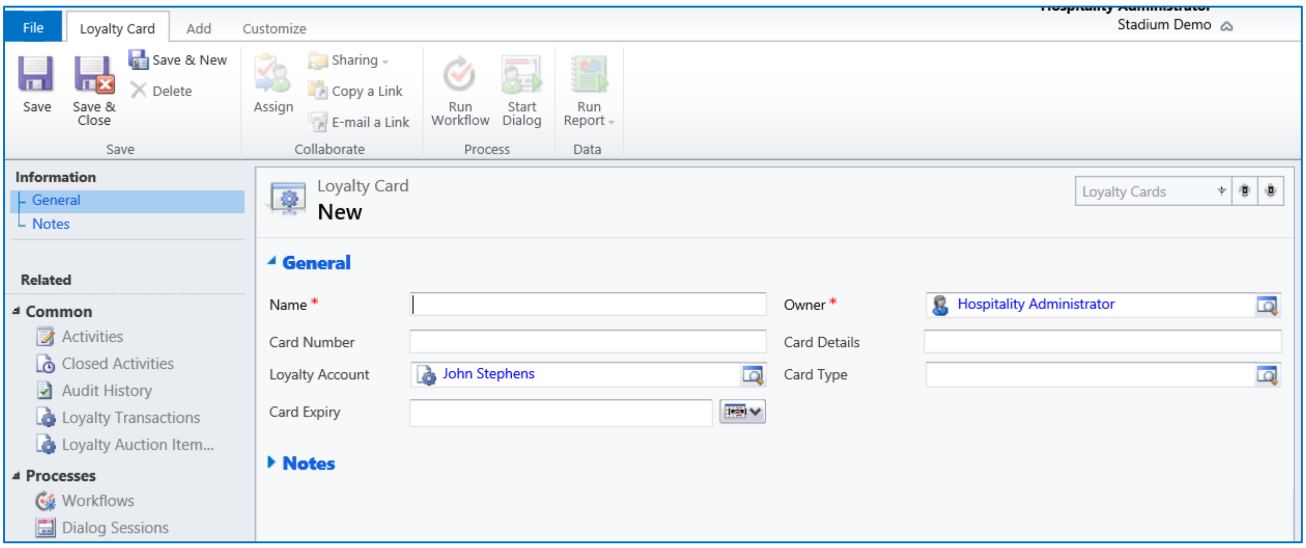
e) Once the details are complete select **Save** on the ribbon.

To add a loyalty card to an account carry out the following:

a) With the Loyalty Account record open, select **Loyalty Cards** in the form navigation panel. A list of the current cards linked to the account will be listed.

b) Select **Add New Loyalty Card** on the ribbon.

c) A blank Loyalty Card form will be displayed:



d) 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 upon.
- **Owner.** The currently logged in user's name will be automatically 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 Lookup Records dialog to identify the card type. The card type is used to categorise the card holders into groups, for example Staff, Corporate, Individual, Student, etc. The card type can be used to award points to a group of card holders. j

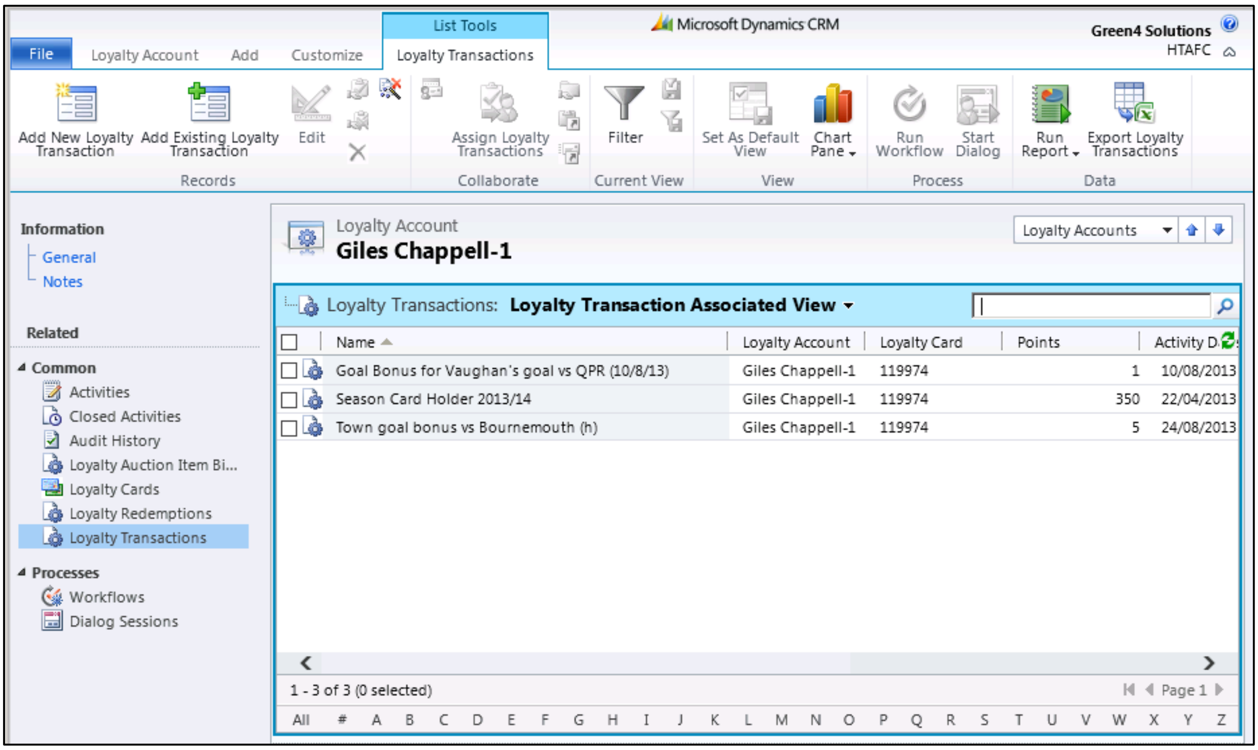
e) Once the details are complete select **Save & Close** on the ribbon.

f) The Loyalty Account form will be redisplayed.

2.1. LOYALTY TRANSACTIONS

Against an account, any transactions that have resulted in loyalty points being awarded will be listed under the Loyalty Transactions area. To view the transactions linked to an account carry out the following:

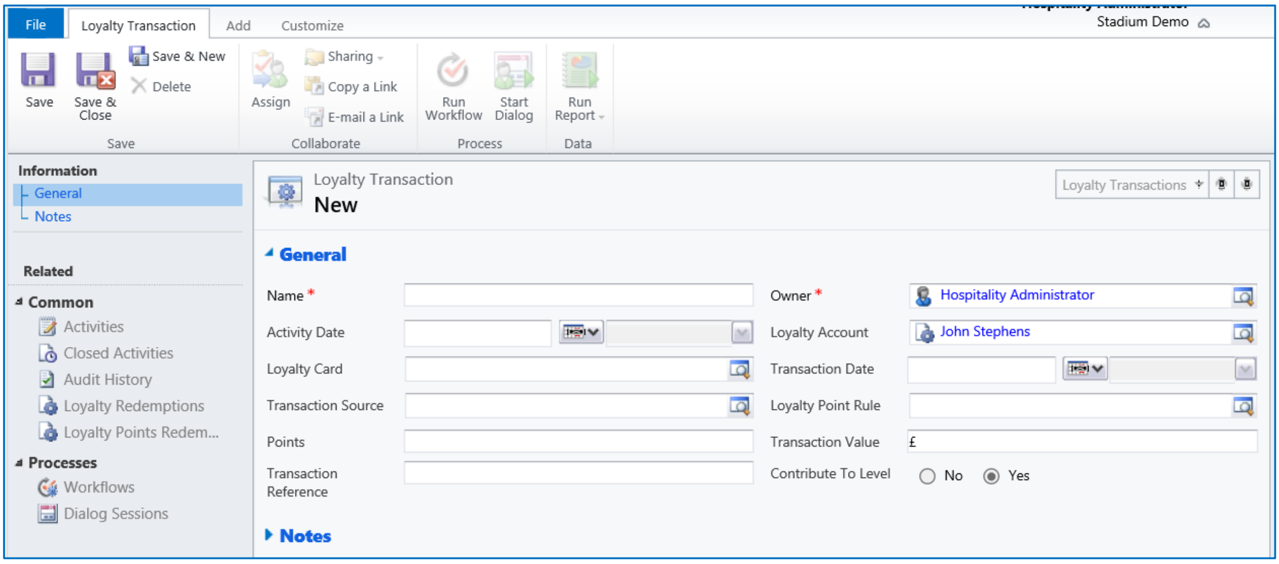
a) With the Loyalty Account record open, select **Loyalty Transactions** in the form navigation panel. A list of all qualifying transactions will be listed.



Transactions are normally added to an account automatically as the result of the loyalty rules running in the background. However **manual transaction** can be added as follows:

a) With the existing transactions listed, select **Add New Loyalty Transaction** on the ribbon.

b) A blank Loyalty Transaction form will be displayed:



c) Complete the following details:

- **Name.** Enter a name for the transaction. The name of the transaction would normally reflect the reason for point being awarded, for example Attendance at a Fixture, Purchase from the Shop, etc.
- **Activity Date.** The date 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 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 be automatically entered.
- **Loyalty Account.** The name of the loyalty account will be automatically 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) Once the details are complete, select **Save & Close** on the ribbon.

2.3. LOYALTY REDEMPTIONS

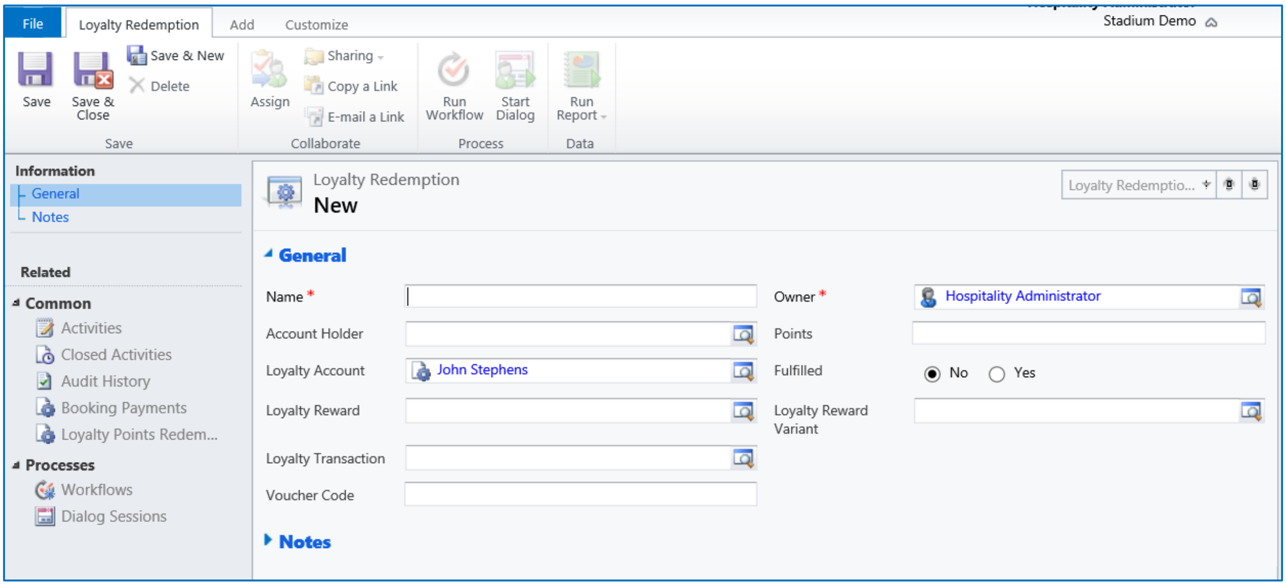
Against an account, any redemption where loyalty points have been used to purchase items will be listed under the Loyalty Redemptions area. To view the redemptions linked to an account carry out the following:

a) With the Loyalty Account record open, select **Loyalty Redemptions** in the form navigation panel. A list of all qualifying redemptions will be listed.

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

a) With the existing redemptions listed, select **Add New Loyalty Redemption** on the ribbon.

b) A blank Loyalty Redemption form will be displayed:



c) 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 be automatically entered.
- **Loyalty Reward.** Use the Lookup Records dialog to select the Loyalty Reward 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 be automatically 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.

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

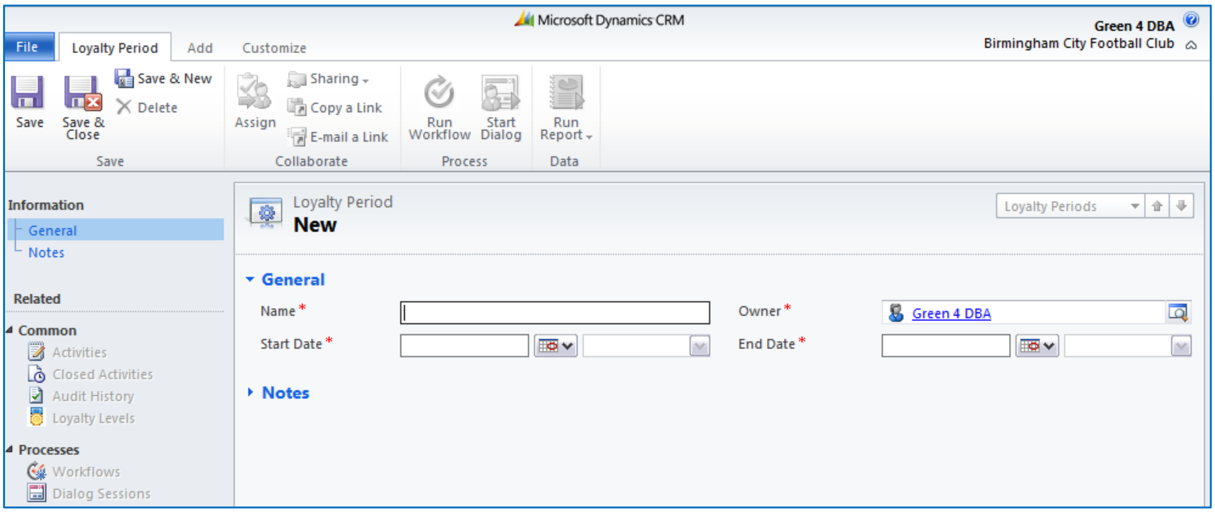
3. SETTING UP LOYALTY PERIODS

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. To create a loyalty period:

a) Select **Loyalty Periods** on the **Loyalty** navigation panel. A list of existing loyalty periods will be displayed.

b) Select **New** on the ribbon.

c) A blank Loyalty Period form will be displayed:



d) Complete the following details:

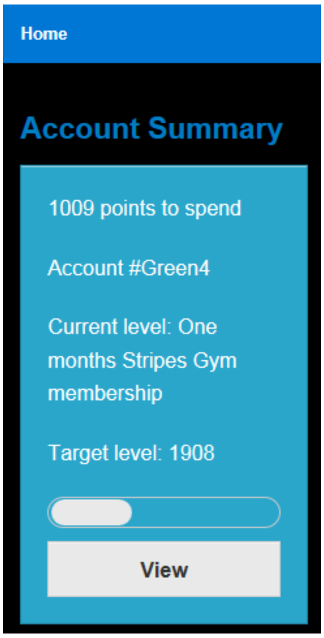
- **Name.** Enter the name of the loyalty period, for example Season 2013/14
- **Start Date.** Enter the start date of the period.
- **Owner.** The currently logged in user's name will be automatically entered.
- **End Date.** Enter the end date of the period.

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

4. SETTING UP LOYALTY LEVELS

Loyalty levels refer to the tiers that can be attained for different 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. The information is displayed in the Account Summary area of the loyalty portal:



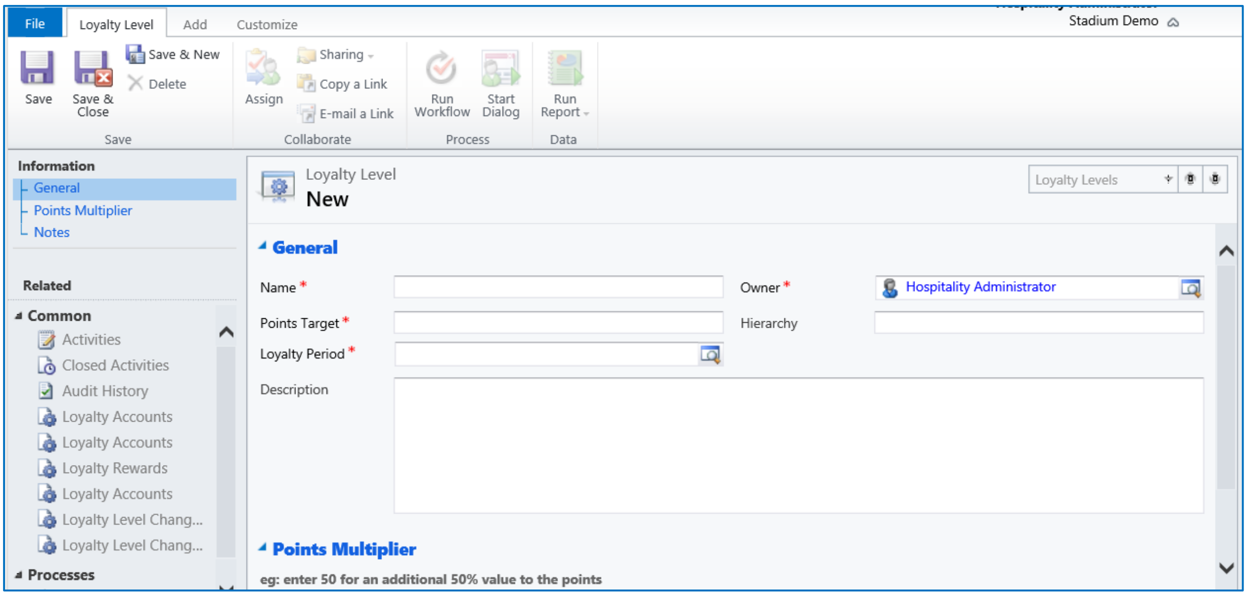
In the above example, the customer is currently on the **One Months Stripes Gym Membership** level and is aiming to reach the **1908** level. A progress bar shows how close the customer is to reaching the next level of your loyalty scheme.

To set up the loyalty levels:

a) Select **Loyalty Levels** on the **Loyalty** navigation panel. A list of existing loyalty levels will be displayed.

b) Select **New** on the ribbon.

c) A blank Loyalty Level form will be displayed:



d) Complete the following details:

- **Name.** Enter the name of the loyalty level, for example Bronze
- **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.** 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 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) Once the details are complete select **Save & Close** on the ribbon.

5. SETTING UP LOYALTY RULES

Setting up of Loyalty Rules is a two-stage process:

1) Set up the Loyalty Transaction Source
2) Set up the Loyalty Point Rule

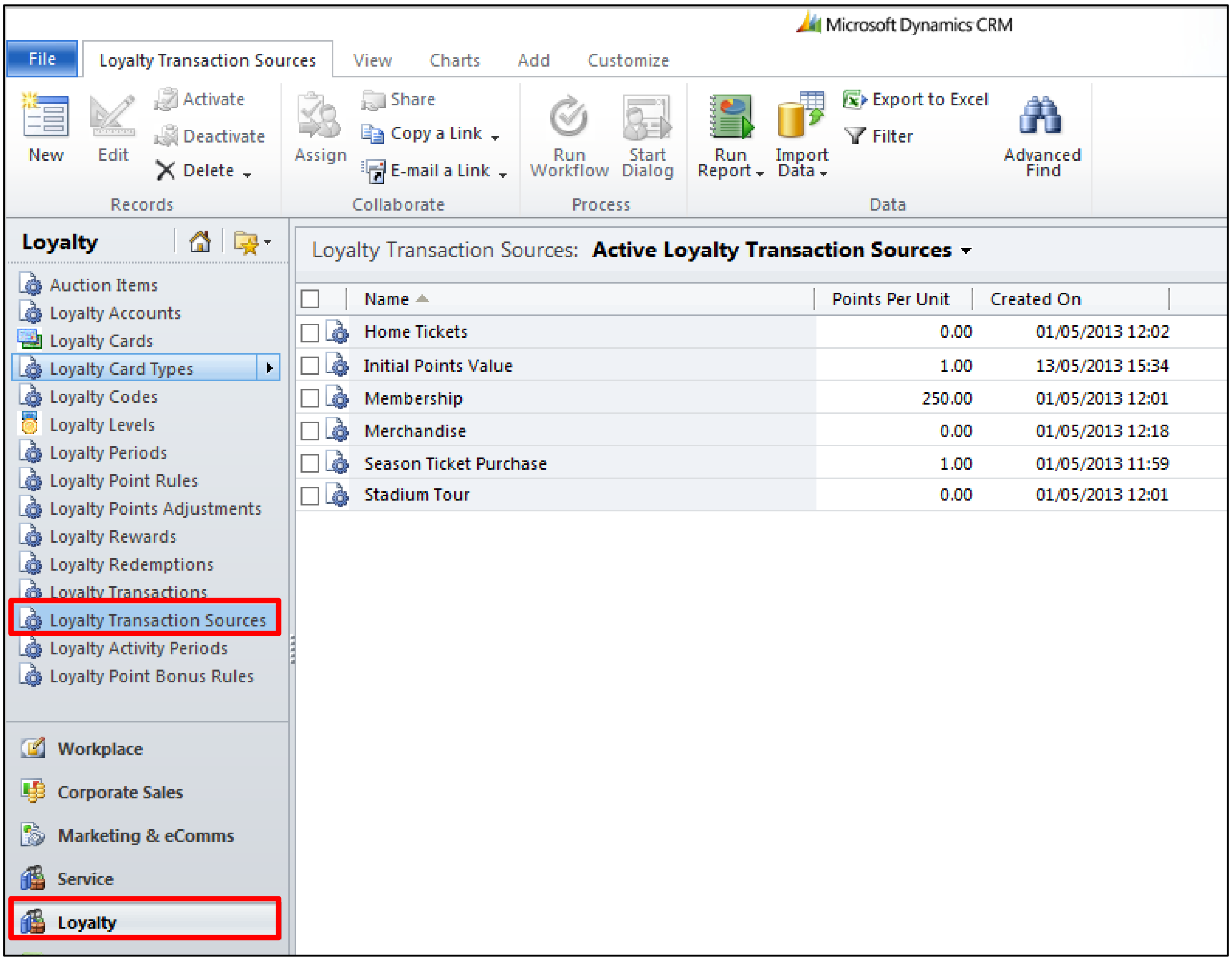
5.1. LOYALTY TRANSACTION SOURCE

The loyalty transaction source entity is used to define the SQL that underlies the loyalty rules.

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.

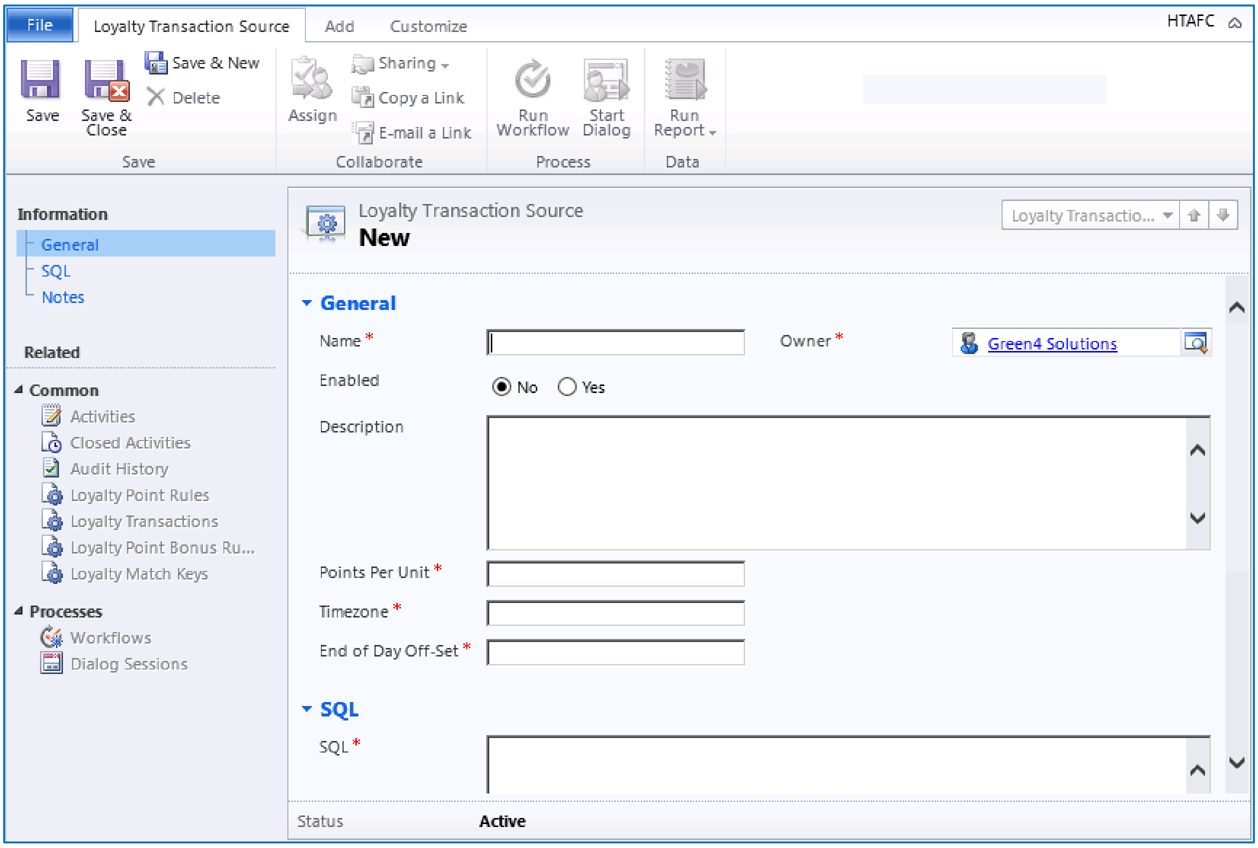
To create a new loyalty transaction source record:

a) Select **Loyalty Transaction Sources** on the **Loyalty** navigation panel. A list of existing loyalty transaction sources will be displayed.



b) To create a new record, select **New** on the ribbon.

c) A blank Loyalty Transaction Source form will be displayed:



d) Complete the following details:

- **Name.** Enter the name of the Loyalty Transaction Source. It is recommended that 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 if no longer in use. Only transaction sources that 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. For example if the bar remains open until 3am enter 3.
- **SQL.** Enter the underlying SQL code that will be used to calculate the points applied to the loyalty account.

2. Once the details are complete select **Save** on the ribbon.

5.2. LOYALTY POINT RULES

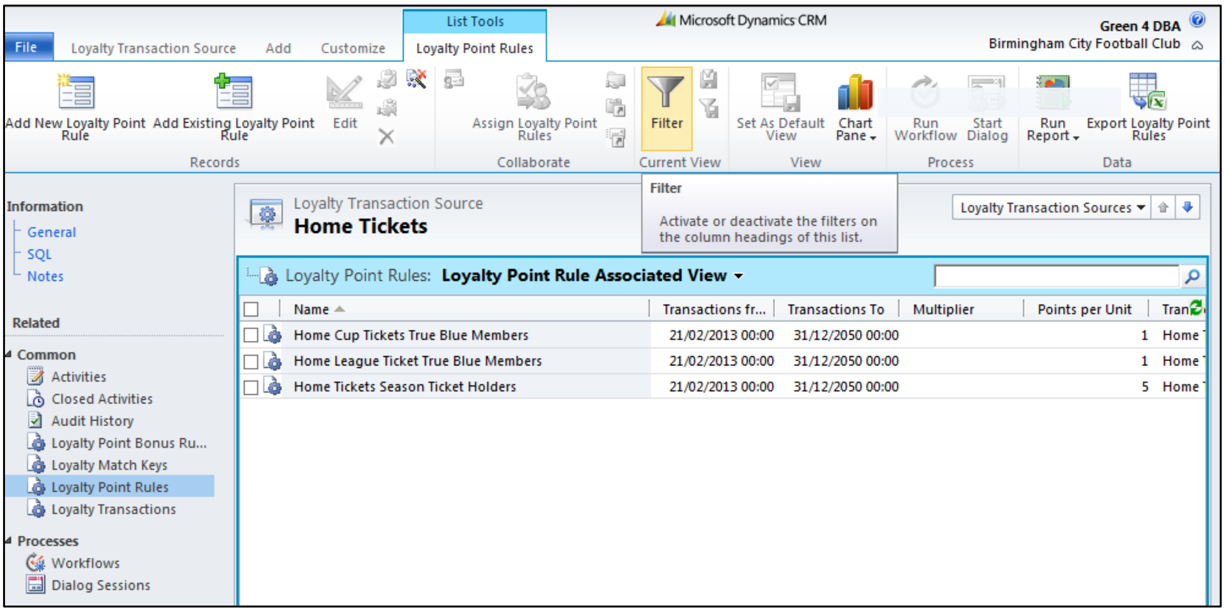
Once the loyalty transaction source record has been set up you can create the loyalty point rules. The loyalty point rules determine when points are going to be awarded to account holder. For example a loyalty point rule will be used to identify a fixture an account holder must attend before points are 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 e.g. 150pts awarded for attending a match, 1 point for every £1 spent on merchandise.
- A points multiplier e.g. double points for attending a certain match, double points for on merchandise bought at the club shop.

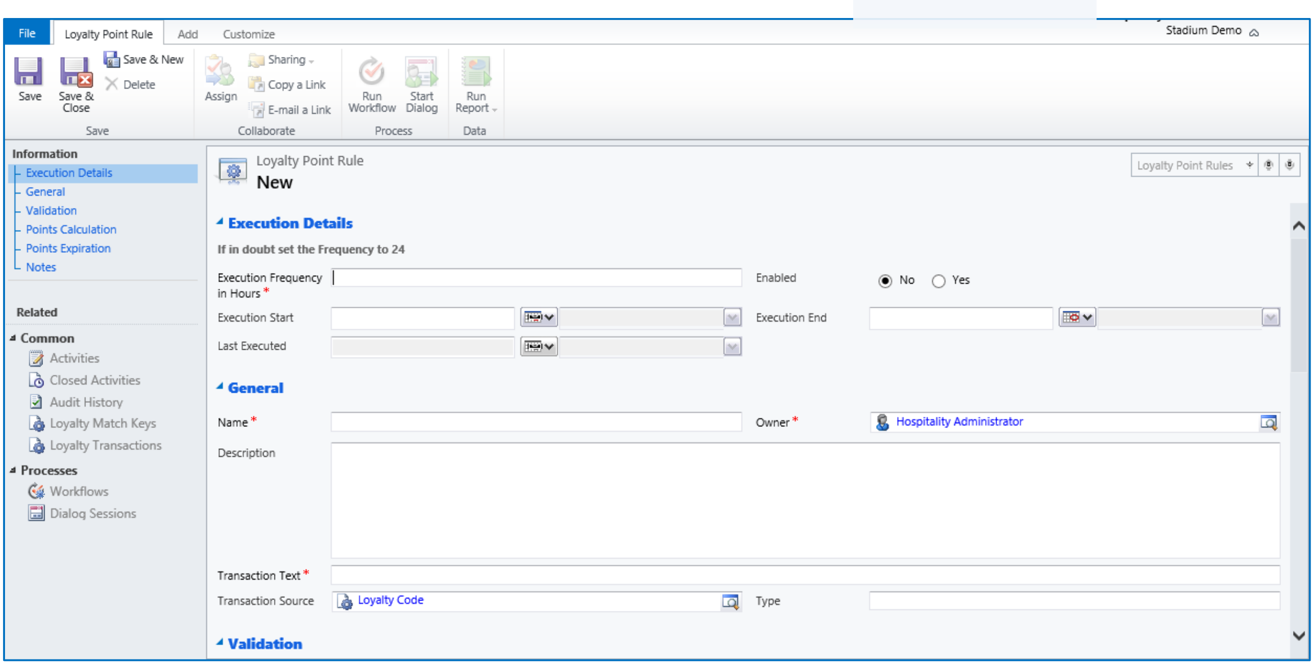
To set up a loyalty points rule:

a) With the Loyalty Transaction Source record open, select **Loyalty Point Rules** in the form navigation panel. A list of the current rules using the Loyalty Transaction Source record will be listed.



b) Select **Add New Loyalty Point Rule** on the ribbon.

c) A blank Loyalty Point Rule form will be displayed:



d) Complete the following details:

Execution Details:

- **Execution Frequency in Hours.** Enter the frequency that the rule should run. To reduce load on the server it is advised that this is set to not be more frequent than 24 hours unless there is a specific reason it needs to be more frequent.

- **Execution Start.** Enter the date and time that 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.

- **Enabled.** The rule should only be enabled once the details of the rule are finalised, to do this select **Yes**. 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 **No**.

- **Execution End.** If the rule is for a one off event or limited time, for example for attendance for a particular event, then it is advised to set an end date and time to save the system having to run processes it does not need to.

- **Last Executed.** This filed will automatically update with the date and time the rule was last run.

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 during 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 during 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. Examples include, if points are awarded for every pound spent 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 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.
- **Disable Loyalty Level Multiplication.** By default this is set to **N**o 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 become expired.

- **Expiration Days. Ent**er the number of days before any unused points generated from this rule will expire.

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

f) The Loyalty Transaction Source form will be redisplayed. Select **Save & Close** on the ribbon.

EXAMPLES

Award 100 bonus points for turning up 30 minutes or more early prior to a specific event

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

Name	Early Attendance Match 250 V Green 4 United	Early Attendance Match 250 V Green 4 United
Description	Early Attendance Bonus for 100 points if arriving 30 minutes of more early	Early Attendance Bonus for 100 points if arriving 30 minutes of more early
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 PPU 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.

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 line transaction line level and to import a Product Category or Description

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

5.3. 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.

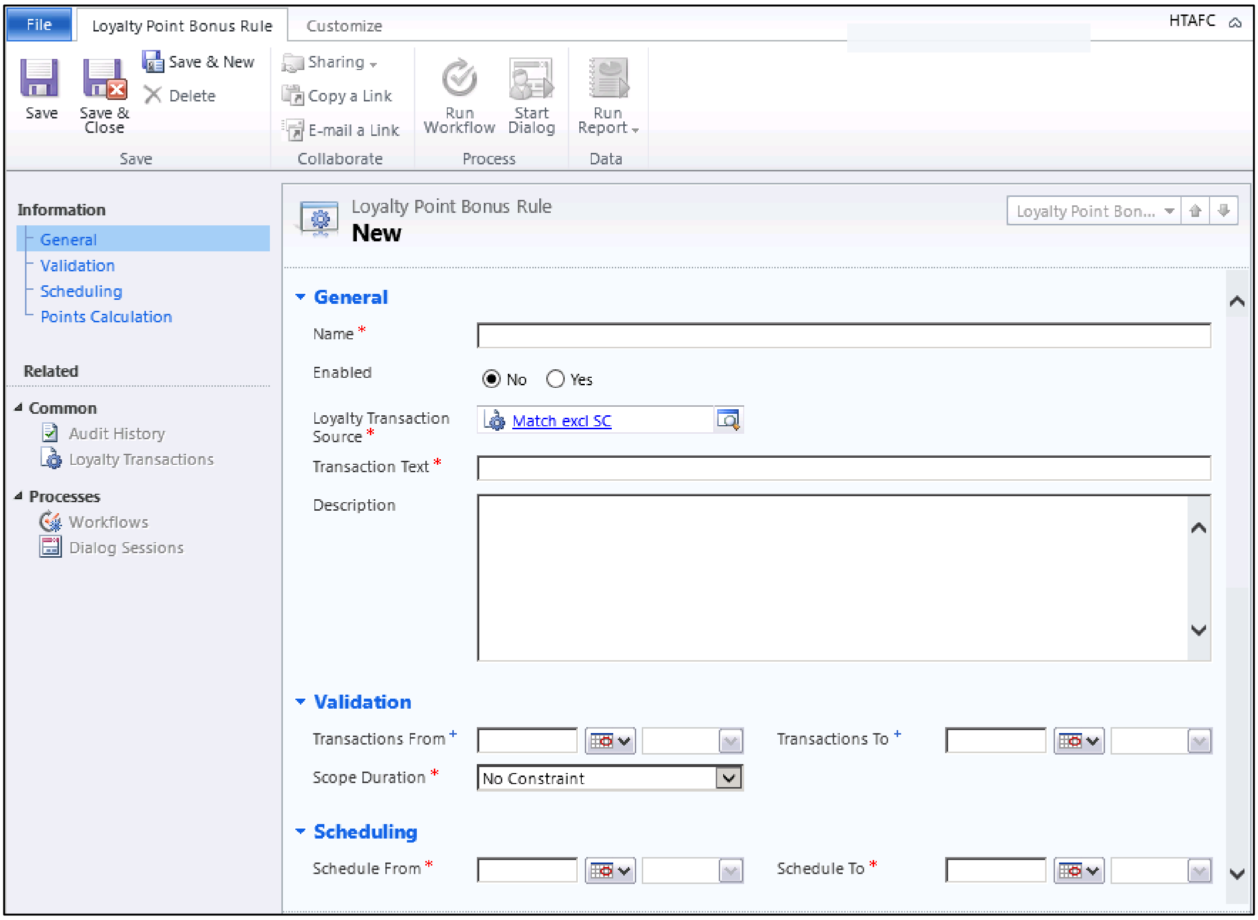
To allow for this situation you can create bonus rules. Unlike standard loyalty rules, a customer can qualify for multiple bonus rules.

To set up a bonus rule:

a) With the Loyalty Transaction Source record open, select **Loyalty Point Bonus Rules** in the form navigation panel. A list of the current rules using the Loyalty Transaction Source record will be listed.

b) Select **Add New Loyalty Point Bonus Rule** on the ribbon.

c) A blank Loyalty Point Bonus Rule form will be displayed:



d) 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 once 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 be automatically 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 during 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 during 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 date must be after the transactional information has been received.

- **Schedule To.** Enter the date until which the rule will run 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) or 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.

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

f) The Loyalty Transaction Source form will be redisplayed. Select **Save & Close** on the ribbon.

EXAMPLE

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

Name	**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 for 100 points if arriving 30 mins early for the match	Early Attendance Bonus for 100 points if arriving 60 mins early for the 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 above example all customers that arrive 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).

5.4. LOYALTY REWARDS

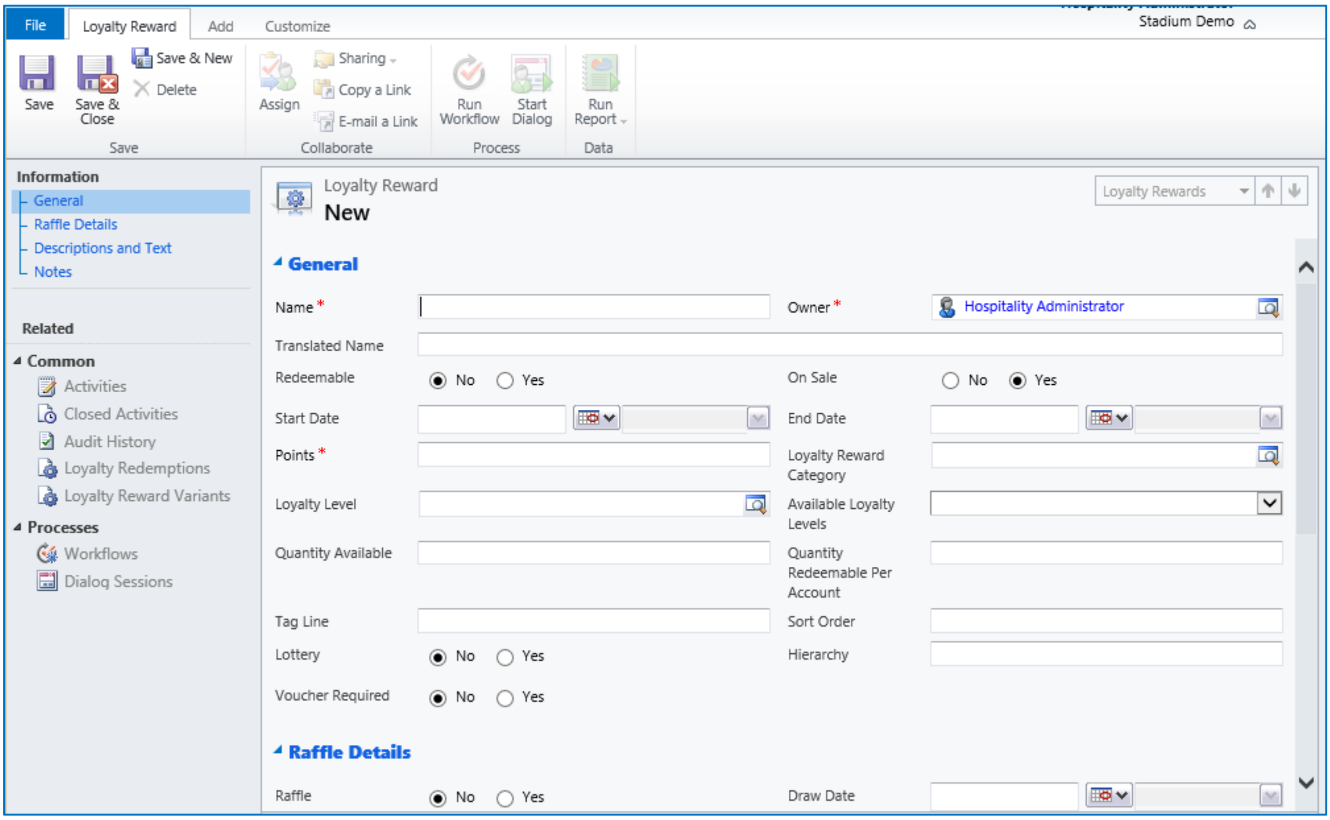
Once you have set up your loyalty accounts and rules, you can start to offer rewards to account holders. Rewards are the offers the account holder can redeem their loyalty points against, for example the opportunity to attend a closed door training session, meet the manager, etc. The loyalty rewards will be available to purchase via the loyalty portal.

To set up a loyalty reward:

a) Select **Loyalty Rewards** on the **Loyalty** navigation panel. A list of existing loyalty point rewards will be displayed.

b) Select **New** on the ribbon.

c) A blank Loyalty Points Reward form will be displayed:



d) 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 on. 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 be automatically entered.
- **On Sale.** Select **Yes** if the reward is currently on sale via the Loyalty portal.
- **End Date.** Enter the date/time that 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 that 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** depending on if this reward related to a Raffle.
- **No of Winners.** If using a Raffle, enter how many winners there can be of the Raffle.
- **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	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. <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>

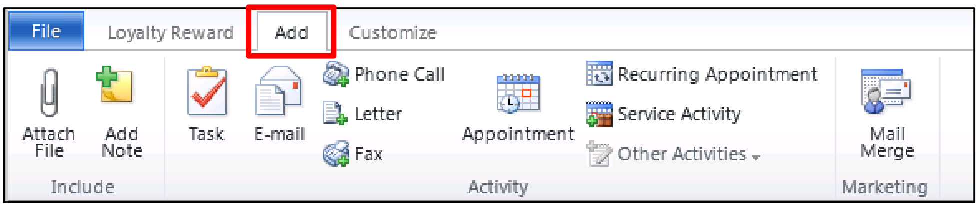
- **Redemption Instructions.** Enter a message to be displayed after a successful redemption. This could give information on how to obtain the reward/raffle item or how it will be dispatched to them. The description should be entered as HTML.

- **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) Once the details are complete select **Save** on the ribbon.

To add an image:

a) Select the **Add** ribbon in the form:



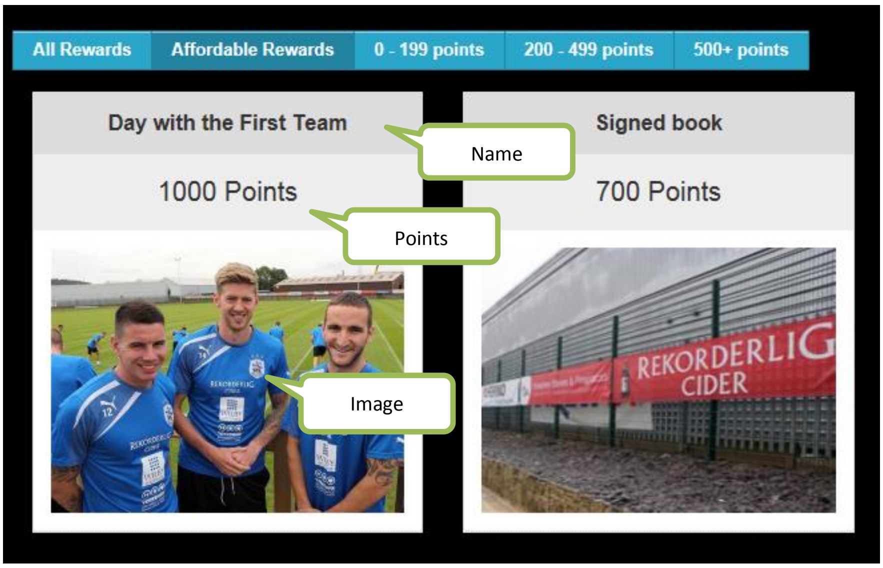
b) Select **Add Note**.

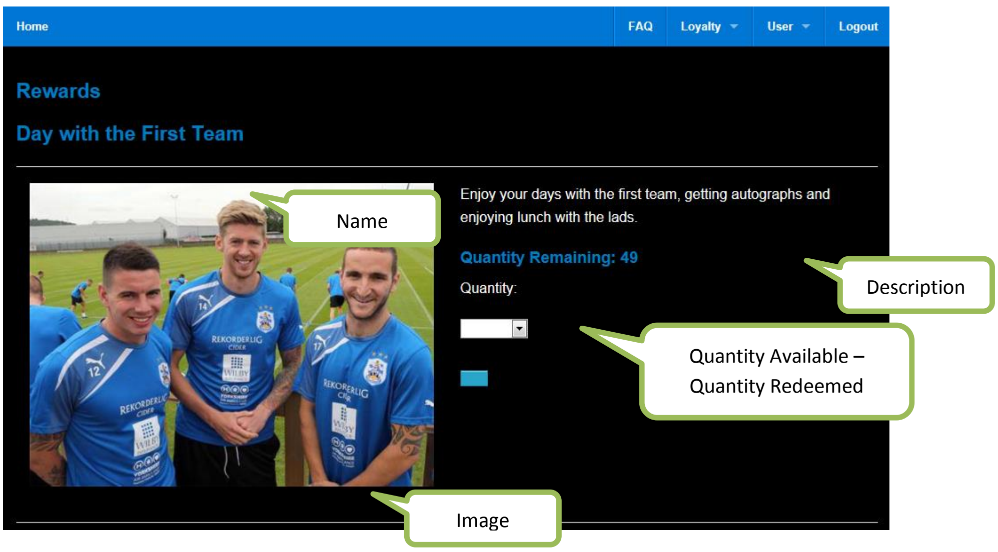
c) The New Note dialog will be displayed. Enter a title of **Image**.

d) Use the Browse and Attach buttons to locate the image you wish to add to the reward record.

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

The following images illustrate where the information entered in CRM will be displayed on the Loyalty Portal:





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 depending upon if they have firstly offered up their seat and then 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.

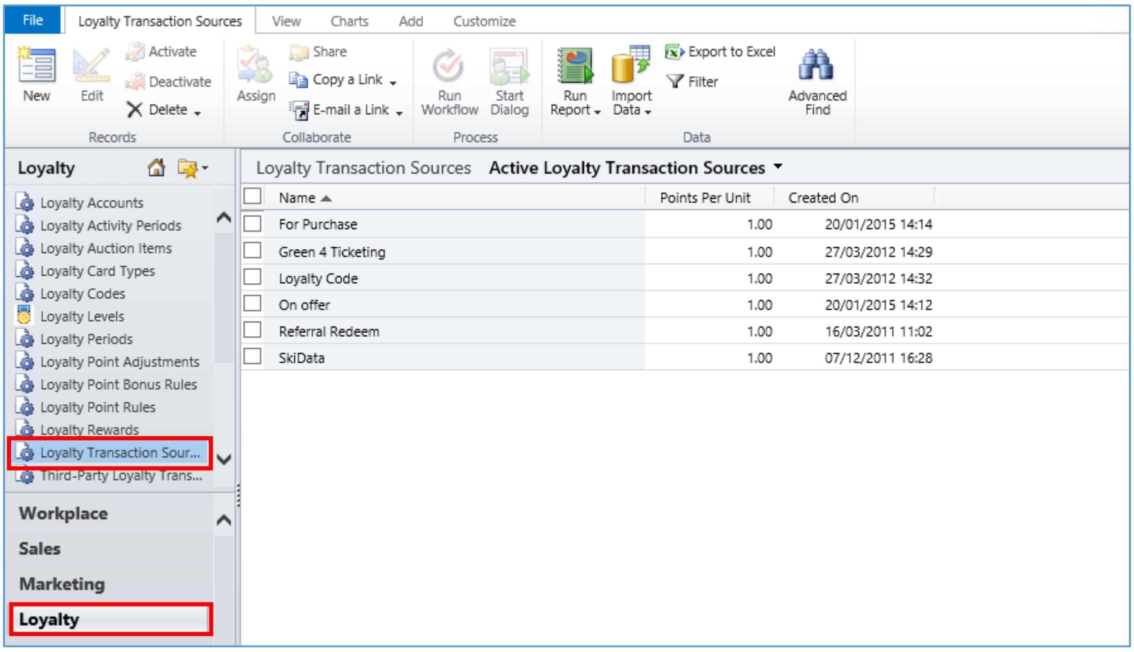
Consequently, loyalty needs to be set up on the CRM system to ensure that loyalty points are transferred to the customer. This is done by creating two Loyalty Transaction Sources and two sets of Loyalty Point Rules which the Loyalty Rule Transaction Generation process must be ran against.

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

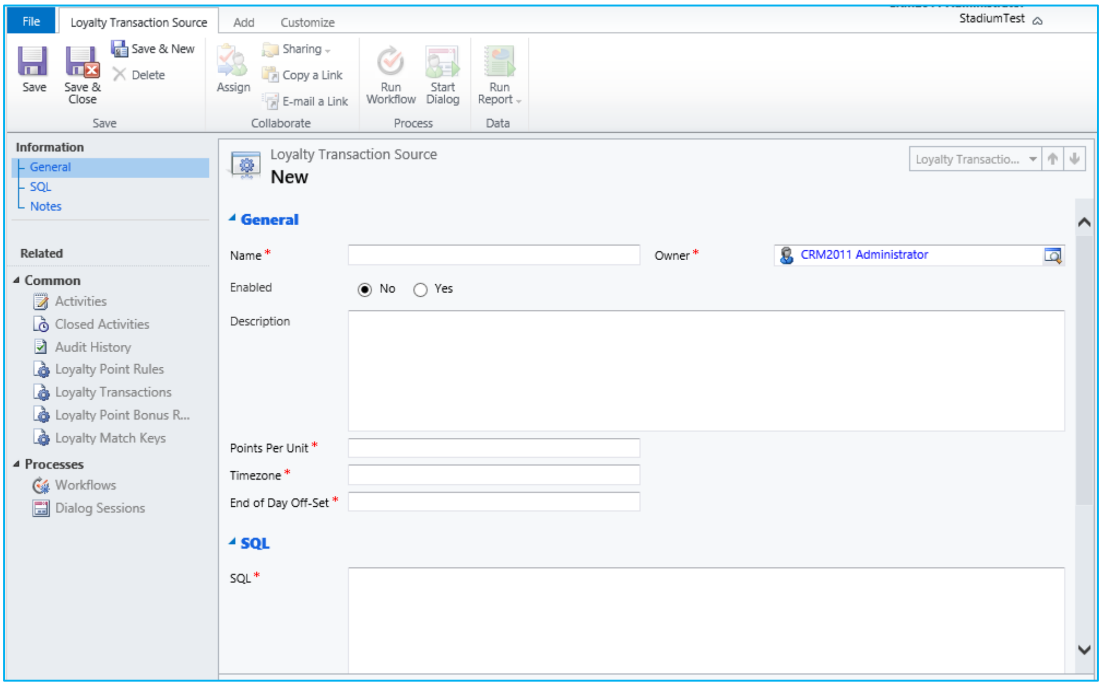
STEP 1. CREATE TWO LOYALTY TRANSACTION SOURCE RECORDS

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**).

a) In the Navigation bar, select **Loyalty** before choosing **Loyalty Transaction Sources**.



b) A list of currently Active Transaction Sources will be displayed, select **New** in the ribbon. A blank Loyalty Transaction Source form will be displayed.



c) Complete the following:

- **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_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([Offer])
) p
where value <> 0
```

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

e) Next, the above steps 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
```

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

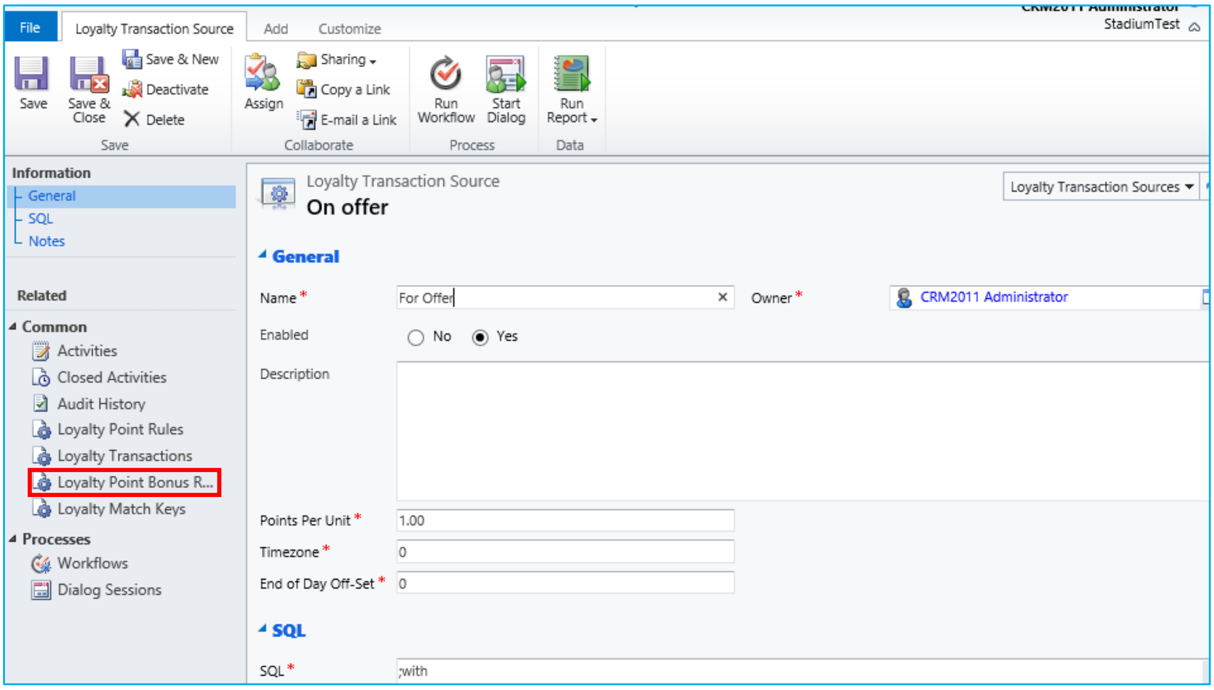
STEP 2. CREATE TWO LOYALTY POINT RULES

Once 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.

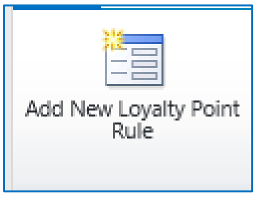
To set up the two Loyalty Points Rules needed for Season Ticket Buy-Backs complete the following:

a) Open up the **For Offer** Loyalty Transaction Source record that was created in Step 1.

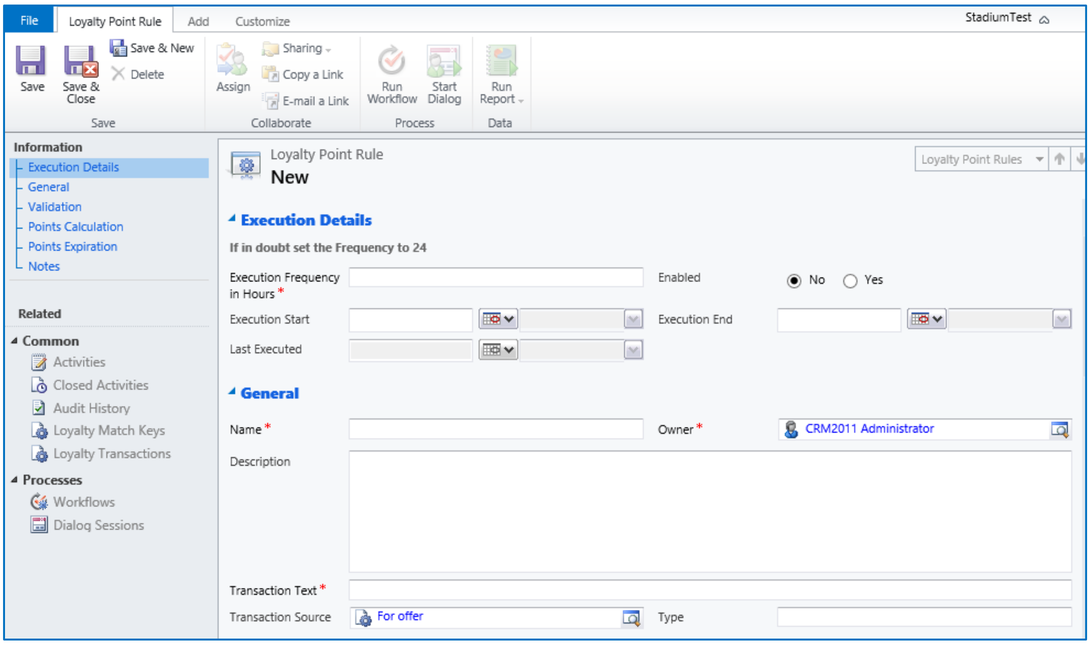
b) In the Navigation Area, select **Loyalty Point Rules**



c) Select **Add New Loyalty Point Rule** in the ribbon.



d) 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 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 be automatically 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 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** depending upon if the rule is to contribute to a level.

Points Expiration:

- **Expiration Date.** Enter the date after which all unused points accrued will become expired.
- **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) Once the details are complete select **Save & Close** on the ribbon.

f) The Loyalty Transaction Source form will be redisplayed. Select **Save & Close** on the ribbon.

g) The above steps 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.

h) In the Navigation Area, select **Loyalty Point Rules**

i) Select **Add New Loyalty Point Rule** in the ribbon.

j) 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** depending upon if the rule is to contribute to a level.

Points Expiration:

- **Expiration Date.** Enter the date after which all unused points accrued will become expired.
- **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.

---

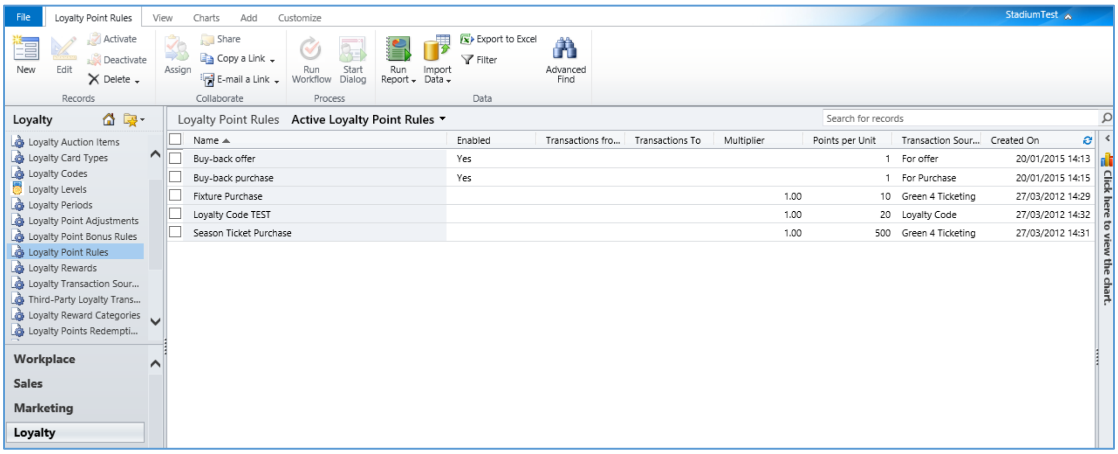
k) Once the details are complete select **Save & Close** on the ribbon.

l) The Loyalty Transaction Source form will be redisplayed. Select **Save & Close** on the ribbon.

STEP 3. RUN THE LOYALTY RULE TRANSACTION GENERATION PROCESS

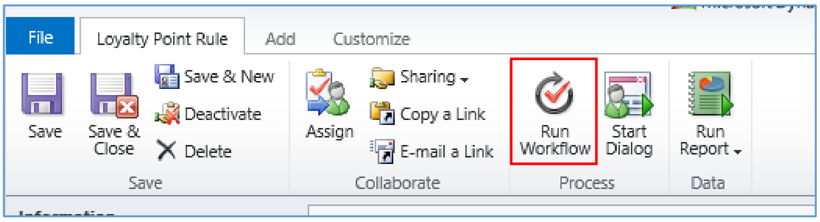
For each of the Loyalty Point Rules that have been created the Loyalty Rule Transaction Generation process must be ran. To do this complete the following:

a) Select **Loyalty** in the Navigation Bar before selecting **Loyalty Point Rules**. A list of currently Active Loyalty Point Rules will be displayed including the two rules called **Buy-back offer** and **Buy-back purchase** that were created in Step 2.



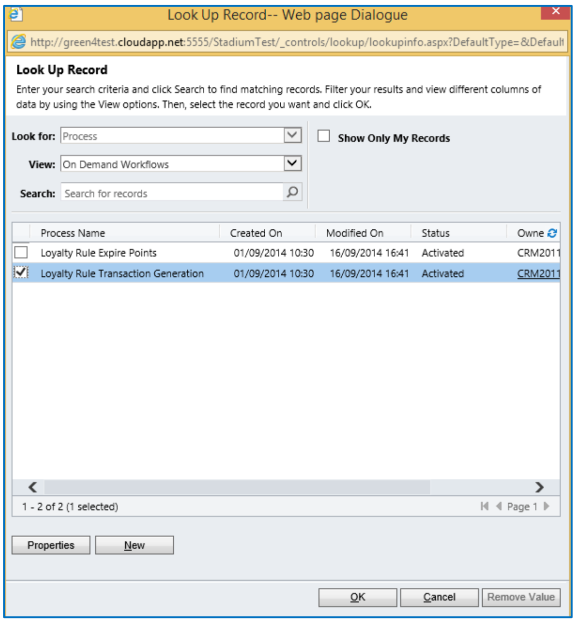
b) For the two Loyalty Point Rules that have been created (Buy-Back offer and Buy-back purchase), open up each of the rules.

c) Within each of the Loyalty Points Rules form select **Run Workflow** in the ribbon.

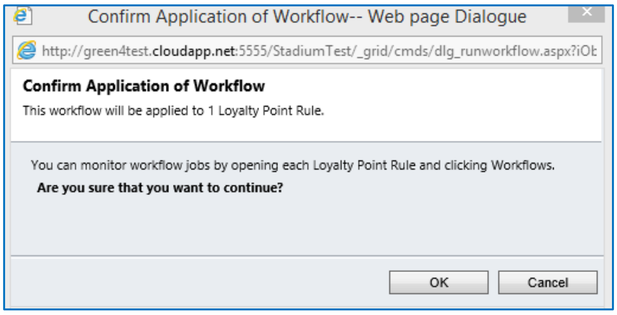


d) A Look Up Records Dialogue will appear.

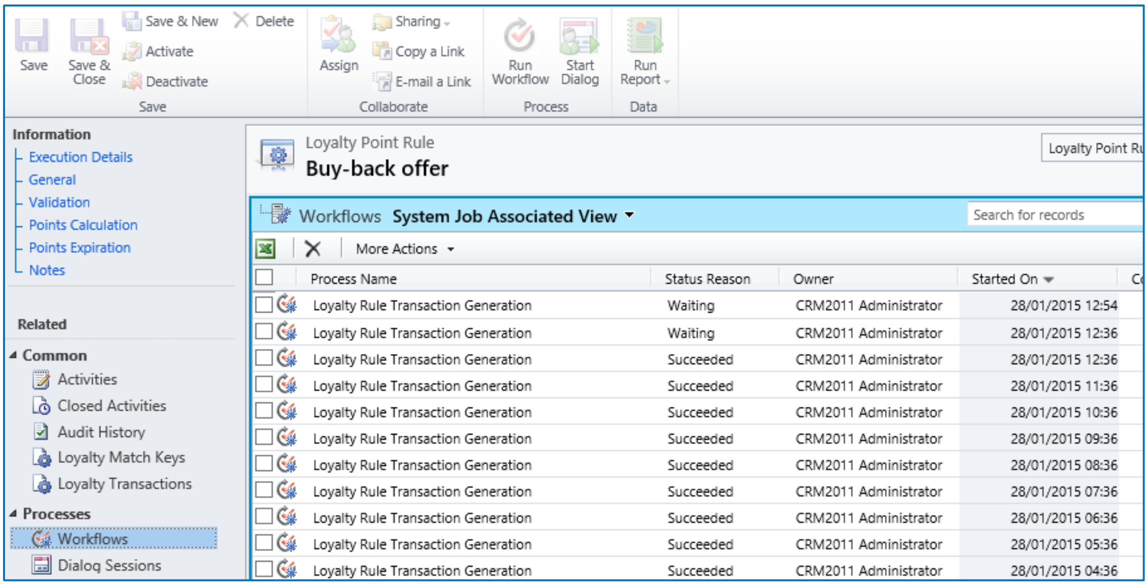
e) Select the tick box next to the Loyalty Rule Transaction Generation before selecting **OK.**



f) A Confirm Application of Workflow dialogue will be shown. Select **OK.**



g) 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 **Workflows** in the navigation area of the Loyalty Point Rule form where the status of it can be found.



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

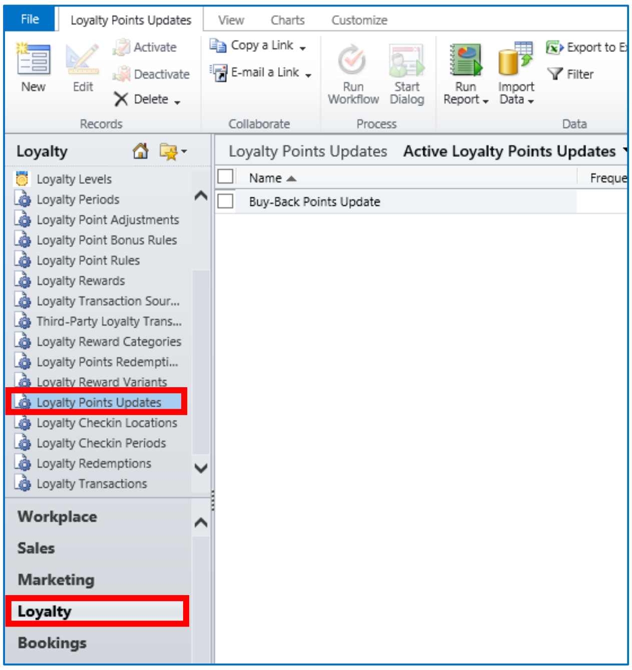
Note: Ensure that the Workflow has been ran for both of the Loyalty Point Rules that were created.

STEP 4. CREATING A LOYALTY POINTS UPDATE

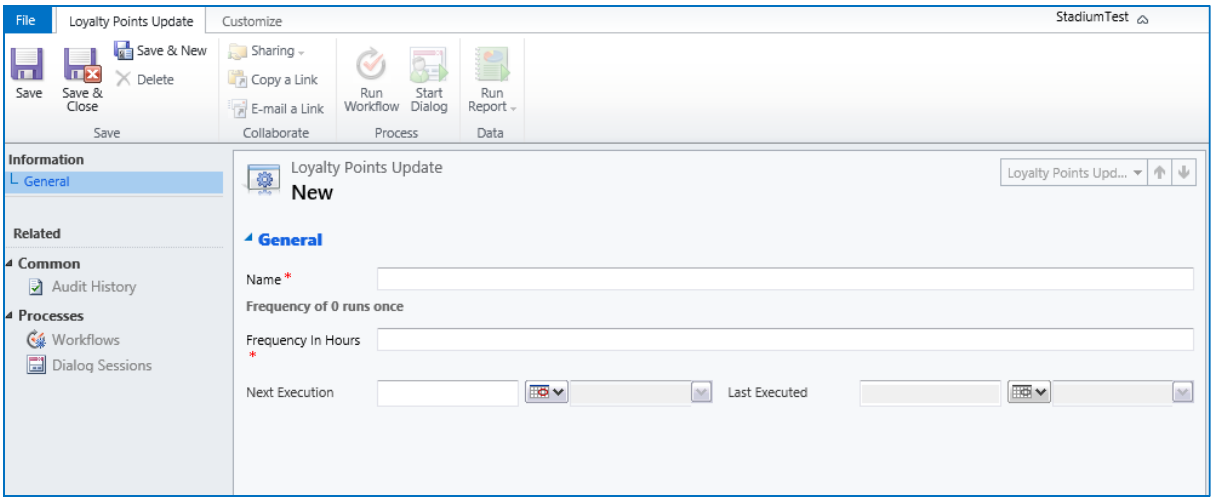
To ensure Loyalty Points are updating in a customer's Loyalty Accounts a workflow in the Loyalty Points Update workflow must be created and then ran.

To do this complete the following:

a) In the Navigation bar select **Loyalty** before choosing **Loyalty Points Updates**.



b) Select **New** on the ribbon. A new Loyalty Points Updates form will be displayed. Complete the following:

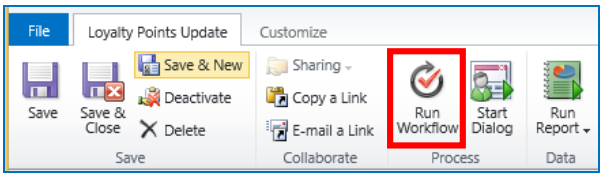


- **Name.** Enter a name for the Loyalty Points Update such as Buy-Back Points Update.
- **Frequency in Hours.** Enter the frequency in hours that the workflow is to be ran, for example 1.
- **Next Execution.** Enter the date and time of the next execution of the workflow.

c) Select **Save and Close** in the ribbon.

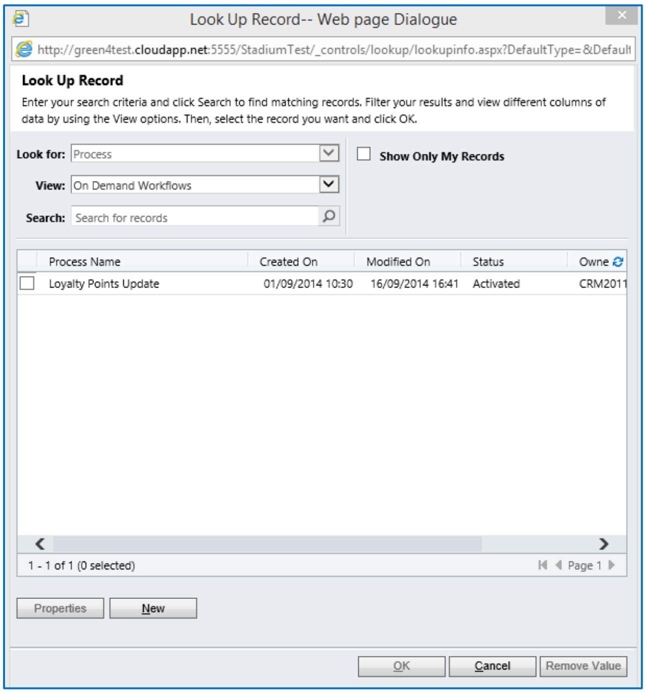
d) Reopen the Loyalty Points Update that has been created.

e) In the ribbon select **Run Workflow.**



f) In the ribbon select **Run Workflow.**

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



h) The Workflow will then be ran. Select **Save and Close** on the ribbon.

7. AUCTION ITEMS

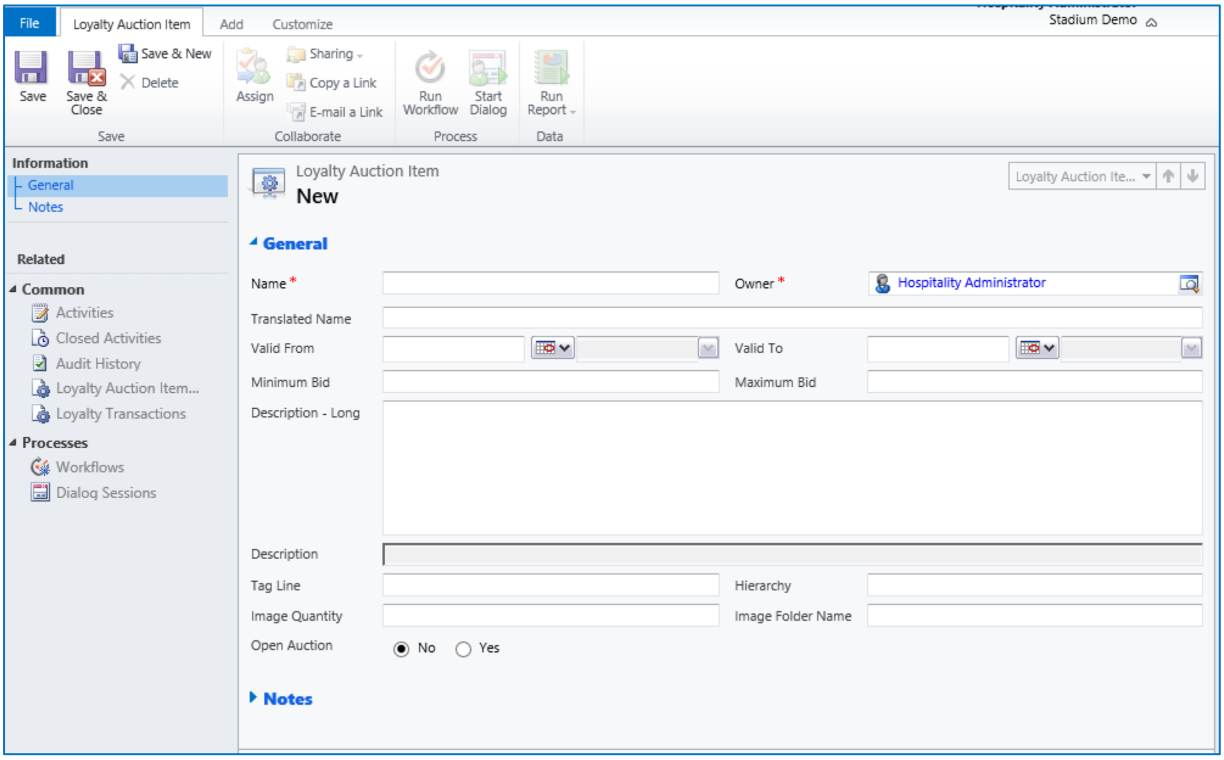
Loyalty account holders can use their loyalty points to bid in loyalty auctions that you set up. Auction items are placed on the loyalty portal for a set period of time to allow the loyalty account holders time to bid. Once bidding has closed the points will be redeemed against the appropriate account depending upon whether the auction was set up as a "highest bid wins" auction or a "raffle" auction, where all bidders loose a predefined number of points.

To set up an auction item:

a) Select **Loyalty Auction Items** on the **Loyalty** navigation panel. A list of existing auction items will be displayed.

b) Select **New** on the ribbon.

c) A blank Auction Items form will be displayed:



d) 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 is 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 website.
- **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) Once the details are complete select **Save & Close** on the ribbon.

8. LOYALTY CODES

Loyalty Codes can be advertised for account holders to enter a code within a certain time window to be awarded bonus points. Loyalty codes allow the account holder to receive additional points by simply entering the code.

Examples may be:

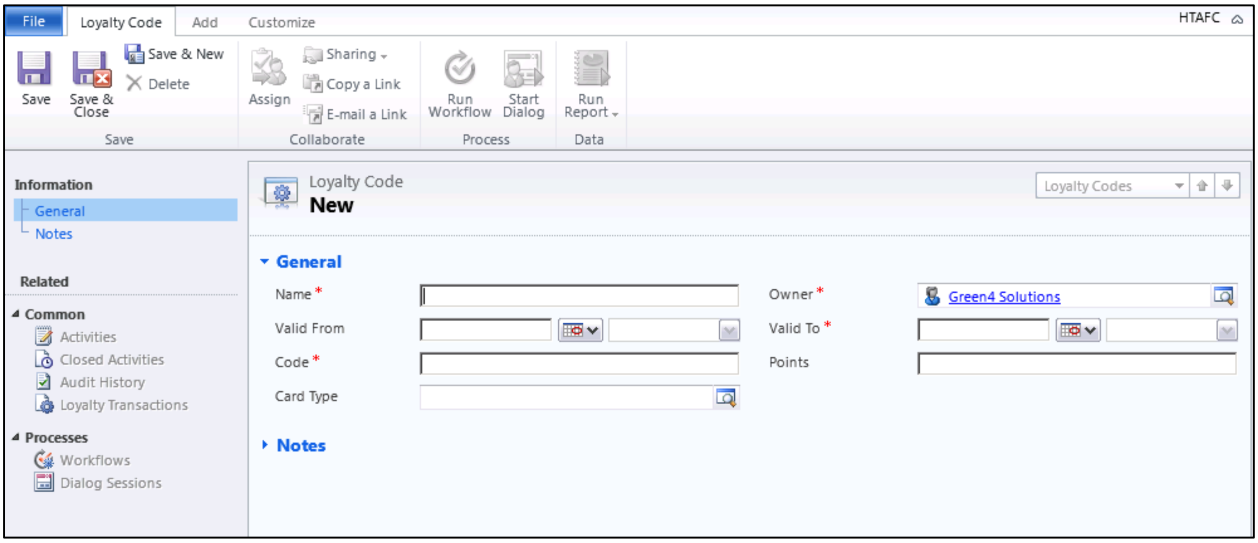
- For a televised Away game a code is shown on TV for users to enter on the portal. If they enter that code by a certain date and time (midday the following day for example) then they would get X bonus points (100 for example).
- A sponsor may print a code on the bottom of their receipts and if that 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:

a) Select **Loyalty Codes** on the **Loyalty** navigation panel. A list of existing loyalty codes will be displayed.

b) Select **New** on the ribbon.

c) A blank Loyalty Code form will be displayed:



d) 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 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 date until 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) Once the details are complete select **Save and Close** on the ribbon.