Vendor: Salesforce

Exam Code:SALESFORCE-LOYALTY-MANAGEMENT

Exam Name: Salesforce Loyalty Management Accredited Professional

Version: Demo

QUESTION 1

Universal Container (UC) is developing a points-based Loyalty Program after the last accrual transaction.

How can the Salesforce Administrator set up this expiration model?

A. Set up Expire Activity Based Qualifying Points

B. Set up Expire Fixed Non-Qualifying Points

C. Set up Expire Activity Based Non-Qualifying Points

D. Set up Reset Qualyfing Points

Correct Answer: C

To set up an expiration model based on activity after the last accrual transaction in a points-based Loyalty Program at Universal Container, the Salesforce Administrator shouldSet up Expire Activity Based Non-Qualifying Points (C). This expiration model allows non-qualifying points to expire after a certain period of inactivity, meaning no new accrual transactions occur within that timeframe. It encourages ongoing engagement from Loyalty Program members by incentivizing regular transactions to keep their non- qualifying points active. Option A (Expire Activity Based Qualifying Points) pertains to qualifying points, which are typically used for tier progression and may have different expiration criteria. Option B (Expire Fixed Non-Qualifying Points) refers to a fixed expiration model that does notconsider member activity. Option D (Set up Reset Qualifying Points) involves resetting qualifying points, which is a different concept from expiration based on activity. Salesforce documentation on Loyalty Management would provide insights into configuring various expiration models for points within a Loyalty Program, including activity-based expiration to foster continuous member engagement and transactional activity.

QUESTION 2

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

Which two components should the Consultant select for this process?

A. A flow to perform both tier-upgrade rule and tier-upgrade orchestration process

B. A flow to schedule and process the custom object\\'s pending records and another flow to perform tier-upgrade orchestration process

C. A flow to perform the tier-upgrade rule and another flow to perform the tier-upgrade orchestration process

D. A data-processing-engine (DPE) to identify the qualified members

Correct Answer: CD

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

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

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

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

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

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

handling complex tier- upgrade criteria and orchestration.

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

QUESTION 3

A company has an existing Loyalty Program, and the marketing team wants to start awarding 10% discounts and 100 points to new members upon sign-up.

What does the Program Administrator need to do for a new member to earn this promotion?

A. Create a record triggered flow using Journal Type, Journal SubType, Transaction Journal, and Process O Member Benefit Action

B. Create a record triggered flow using Journal Type. Journal SubType, Transaction Journal. Credit Points action and Issue Voucher action

C. Create an autolaunched flow using Transaction Journal, Loyalty Ledger,and Get Loyalty Promotions forTransactions

D. Create an autolaunched flow using Journal Type. Journal SubType, Transaction Journal, Credit Points ?action, and Issue Voucher action

Correct Answer: B

To award new members with a 10% discount and 100 points upon sign-up, the Program Administrator should:

B:Create a record-triggered flow using Journal Type, Journal SubType, Transaction Journal, Credit Points action, and Issue Voucher action. This flow will automate the process of crediting points and issuing discount vouchers to new

members as part of the promotion.

Reference: Salesforce documentation on automation with Flows provides a framework for setting up complex business processes, such as awarding promotional benefits to Loyalty Program members upon specific triggers like sign-up.

QUESTION 4

The Member Services team wants to view the information of a member\\'s recent transactions and manual adjustments on the Contact record.

What are the two recommendations that an IT Administrator should suggest?

A. Embed the `Member Summary Embedded Dashboard on the Contact record

B. Embed the Member Service Manager Home Dashboard on the Contact record

C. Add the `Transaction Journals\\' related list to the Contact record

D. Add the `View Member Profile\\' component on the Contact record

Correct Answer: AC

To provide the Member Services team with the information they need directly on the Contact record, the IT Administrator can take two main actions. Firstly, embedding the \\'Member Summary Embedded Dashboard\\' on the Contact record allows the team to have a visual and comprehensive overview of a member\\'s loyalty activities, including recent transactions and adjustments, directly within the context of the contact. This dashboard is specifically designed to aggregate and display relevant loyalty information, making it a suitable tool for quick insights. Secondly, adding the \\'Transaction Journals\\' related list to the Contact record enables the team to view detailed entries of each transaction and manual adjustment made by or for the member. This related list provides granular data about each activity, allowing for a deeper analysis and understanding of the member\\'s loyalty interactions. These recommendations are based on best practices for Salesforce Loyalty Management, ensuring that the team has access to both summarized and detailed loyalty information within their usual workflows, enhancing efficiency and providing a holistic view of member activities.

QUESTION 5

Northern Trail Outfitters wants to show member information in its member portal hosted outside of Salesforce.

What is a prerequisite for using Loyalty APIs to fetch the member information?

A. Create custom objects in Loyalty

B. Create a Connected App in Platform

C. Create customer integration code

D. Create Data Processing jobs

Correct Answer: B

For Northern Trail Outfitters to display member information in its external member portal, a crucial prerequisite is the creation of a Connected App in Salesforce Platform. This Connected App facilitates secure API access to Salesforce data,

including Loyalty Management information, by providing an authentication and authorization framework.

By setting up a Connected App, Northern Trail Outfitters can establish a secure connection between its external member portal and Salesforce, enabling the retrieval of member information through Loyalty APIs. This setup ensures that the

external portal can access up-to-date loyalty data, such as member points, tier status, and transaction history, in a secure and controlled manner, enhancing the member experience outside of Salesforce.

QUESTION 6

An Administrator must configure a tier point reset for a Loyalty Program to occur once every two years.

Which two setting does the Administrator need to consider in this scenario?

A. The Loyalty tier group field is populated.

B. The qualifying point reset date, period, and frequency are set on the tier group.

C. The Currency type field must correspond to qualifying.

D. The currency type field must correspond to non-qualifying.

Correct Answer: B

For configuring a tier point reset in Salesforce Loyalty Management that occurs once every two years, the administrator needs to consider:

The qualifying point reset date, period, and frequency are set on the tier group (B):This setting ensures that members\\' qualifying points are reset according to the specified schedule, in this case, every two years. This reset mechanism is

crucial for maintaining the program\\'s competitiveness and encouraging ongoing member engagement.

The option A, "The Loyalty tier group field is populated," is a prerequisite for tier management but not directly related to the reset settings. Options C and D, regarding the Currency type field, are not relevant to the tier point reset settings, as

the resetpertains to the accumulation and expiration of qualifying points within the tier structure, not the currency type.

Salesforce Loyalty Management documentation would provide detailed instructions on configuring tier resets, including the impact of different settings on member tiers and how to communicate changes effectively to maintain member

satisfaction and engagement.

QUESTION 7

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

A. Assign Analytics for Loyalty User Permissions.

B. Create standard Salesforce reports and dashboard

C. Schedule dataflow for the analytics

D. Create an App using existing templates

E. Install CRM Analytics package

Correct Answer: ACE

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

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

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

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

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

enabling Loyalty Analytics and dashboards.

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

utilize analytics and dashboards effectively.

QUESTION 8

An Administrator needs to analyze the performance of the Loyalty Program.

What Loyalty Analytics permission does a System Administrator need to set up and customize?

A. Loyalty Analytics User

B. CLAAnalytics Base Admin

C. Data Pipeline User

D. CRM Analytics User

Correct Answer: A

To analyze the performance of the Loyalty Program, a System Administrator needs to set up and customize Loyalty Analytics, which requires theLoyalty Analytics User (A)permission. This permission set enables the administrator to access Loyalty Analytics features, configure reports, and customize dashboards to analyze various aspects of the Loyalty Program\\'s performance, such as member engagement, tier progression, redemption rates, and more. Option B (CLAAnalytics Base Admin), Option C (Data Pipeline User), and Option D (CRM Analytics User) refer to different aspects of Salesforce analytics and data management, which, while potentially relevant in broader contexts, are not specifically tailored to the setup and customization of Loyalty Analytics within Salesforce Loyalty Management. Salesforce documentation on Loyalty Management and Analytics would provide guidance on leveraging analytics capabilities to gain insights into Loyalty Program performance, guiding data-driven decision-making and program optimization.

QUESTION 9

What two fields are attributed to a Loyalty Program entity in the Salesforce Customer Data Platform?

A. Created Date

B. Last Modified Date

C. Current Member Count

D. Reporting Enabled (Boolean)

Correct Answer: AB

Within the Salesforce Customer Data Platform (CDP), the Loyalty Program entity is attributed with various fields that help in managing and analyzing the loyalty program\\'s performance. Two essential fields attributed to this entity are Created

Date and Last Modified Date.

The Created Date field records the timestamp when the Loyalty Program entity was initially created in the system, providing a reference point for the program\\'s inception. The Last Modified Date field, on the other hand, keeps track of the most

recent update made to the Loyalty Program entity, offering insights into the program\\'s maintenance and evolution over time.

These fields are crucial for administrative and analytical purposes, allowing businesses to monitor the lifecycle of their loyalty programs and make data-driven decisions based on the program\\'s history and modifications.

QUESTION 10

Northern Trail Outfitters would like to encourage sustained engagement with its brand over time, the company has created a Promotion that issues a bonus reward to members who make three purchases in a single month.

What type of Loyalty Promotion should the Administrator use?

A. Standard Promotion

B. Cumulative Promotion

C. Joint Promotion

D. Aggregate Promotion

Correct Answer: B

For a promotion that rewards members for making three purchases in a single month, the appropriate type of Loyalty Promotion to use would be:

Cumulative Promotion (B):This type of promotion is designed to reward members for cumulative actions over a specified period, such as making multiple purchases within a month. It tracks and accumulates qualifying activities, issuing

rewards once the defined criteria are met, making it ideal for encouraging sustained engagement and repeat transactions.

Options A (Standard Promotion), C (Joint Promotion), and D (Aggregate Promotion) do not specifically cater to the requirement of rewarding members for multiple actions within a set timeframe, making Cumulative Promotion the most suitable

choice for this scenario. Salesforce documentation on Loyalty Management would provide detailed information on different types of promotions, including how to set up and manage a Cumulative Promotion to drive engagement and reward

member loyalty effectively.

QUESTION 11

Universal Containers implemented a Loyalty Program six months ago. The Loyalty Program Manager noticed a recent decrease in program efficiency. Now the Manager wants to incorporate a targeted strategy.

Which two benefits should the Administrator expect as a result of running the strategy?

A. Personalized digital marketing

B. Transaction journey data is automatically archived

C. Customers are rewarded based on their tiers

D. Data-based segmentation strategy

Correct Answer: AD

Incorporating a targeted strategy in a Loyalty Program can lead to the following benefits:

Personalized digital marketing (A):A targeted strategy allows for more personalized communication and offers, tailored to the specific behaviors, preferences, and tiers of loyalty program members, enhancing member engagement and

program effectiveness.

Data-based segmentation strategy (D):By leveraging data to segment the loyalty program members, the program can deliver more relevant and appealing offers and communications, increasing member satisfaction and program participation.

Automatically archiving transaction journey data (option B) is more of a data management practice and not directly a benefit of running a targeted strategy. Rewarding customers based on their tiers (option C) is a common practice in loyalty

programs but does not specifically result from implementing a targeted strategy. Salesforce documentation on Loyalty Management would detail the advantages of implementing targeted strategies within loyalty programs, including how to

leverage Salesforce tools for personalized marketing and data-driven segmentation.

QUESTION 12

A loyalty Program would like to set up a new process where a push notification or email will be sent to the client immediately after a voucher is added to their member account within Salesforce Marketing Cloud.

The notification message will require the "first name" and the "membership number" to personalize the message and, a custom object named

"voucherissued" with the necessary data attributes.

Which option for the entry event should be selected as the preferred implementation approach that can meet the requirements with the least amount of development effort?

A.
data-extension that receives the new voucher-disbursement records that contains the Member's "first name" and the "membership number" as the attributes.

B.
Event Source : "Salesforce Data", > Source object : "VoucherDefintion" custom object , > Entry-Data: All attributes from the "VoucherDefintion" objects

C.
Event Source : "Salesforce Data", > Source object: "Voucher", > Entry-Data: Attributes from the "Voucher", "Contact" and "LoyaltyProgramMember" objects.

D.
Event Source : "Salesforce Data", > Source object : "VoucherDefintion" custom object , > Entry-Data: All attributes from the "VoucherDefintion" objects

A. Option A

B. Option B

C. Option C

D. Option D

Correct Answer: C

For the scenario described, where a loyalty program wants to send an immediate notification after a voucher is added to a member\\'s account, the entry event in Salesforce Marketing Cloud needs to trigger off of the creation of a record in Salesforce that contains the necessary data attributes for personalization. Option C is the most suitable choice because it specifies an entry event based on the "Voucher," "Contact," and "LoyaltyProgramMember" objects. This approach aligns with the requirements because it directly utilizes the "first name" from the Contact object and the "membership number" from the LoyaltyProgramMember object, which are necessary for personalizing the notification message. Moreover, Option C would likely require the least amount of development effort because it leverages existing Salesforce data and related objects without the need for additional configuration or data extensions. In contrast, other options would require the setup of a data extension or custom objects that may not be directly tied to the triggering event, thereby increasing the complexity and development effort. In Salesforce Marketing Cloud, Journey Builder is the tool that would be used to create this customer journey. It allows for the configuration of entry events based on data changes in Salesforce, such as the addition of a voucher to a member\\'s account. The real-time nature of this trigger is essential for the immediate notification requirement. According to Salesforce\\'s official documentation, using Salesforce data as the entry source for a journey allows for real-time messaging based on record creation or updates. This means that as soon as a voucher record is created or updated in Salesforce, the entry event can trigger and begin the journey, which will send the personalized notification to the member. In practice, setting up this entry event in Journey Builder would involve specifying the criteria for the trigger (in this case, the creation of a voucher) and mapping the necessary data fields for personalization. This is consistent with Salesforce\\'s best practices for creating personalized, real-time customer engagements through Journey Builder. Salesforce\\'s documentation on Journey Builder and real-time event triggers provides further details on how to configure these types of journeys and can be referred to for step- by-step guidance and the latest feature updates.