

Siebel 8.1 Loyalty

Duration: 2 Days

What you will learn

Students learn how to create and configure a loyalty program in Siebel 8.1 Loyalty, including how to create and support loyalty point types and manage loyalty tiers. Loyalty promotions provide a powerful mechanism for handling loyalty accruals and redemptions, managing membership tiers, and supporting member services. Students learn how to design, implement, and test promotions. Loyalty programs typically have a rich partner infrastructure. Students learn how to register and qualify loyalty partners, define partner terms, specify partner products, and organize products in catalogs.

Implementing Siebel 8.1 Loyalty requires configuration to the specific requirements of the host company. Students learn how to configure loyalty-specific features, including member services and lists of values. Students also learn how to optimize Loyalty server components by setting component parameters and system preferences.

Learn To:

- Create loyalty programs
- Define loyalty point types and loyalty tiers
- Design, implement, and test loyalty promotions
- Create loyalty products and create redemption catalogs
- Configure loyalty member services
- Configure loyalty processing engine parameters

Audience

- Administrator
- Application Developers
- Business Analysts
- Project Manager

Prerequisites

Required Prerequisites

Siebel 8.0 Fundamentals

Siebel 8.0 Technical Foundations - RWC

Suggested Prerequisites

Basic Windows navigation and file management skills

Course Objectives

- Create loyalty program point types
- Describe the role of the different Siebel Loyalty applications
- Create a loyalty program
- Create and test loyalty promotions
- Create loyalty program tier classes, tiers, and tier promotions

- Create base and accrual promotions
- Configure redemptions in Siebel Loyalty
- Create loyalty products and catalogs
- Configure Siebel Loyalty member services
- Configure Siebel Loyalty server components and parameters
- Use Siebel Loyalty Web services

Course Topics

Introducing Siebel Loyalty

- Defining key Siebel Loyalty terms
- Identifying important Siebel Loyalty entities
- Describing three Loyalty applications

Creating Loyalty Programs and Points

- Creating a loyalty program record
- Creating loyalty point types

Creating Loyalty Promotions

- Describing the components of a loyalty promotion
- Designing promotion rules
- Creating and testing a loyalty promotion

Administering Loyalty Partners

- Configuring Siebel Loyalty for partner operations
- Creating partner users
- Describing a scenario of a partner using Siebel Loyalty Partner Portal
- Performing administrative tasks to support loyalty partners

Creating Loyalty Programs: Tiers

- Creating loyalty tier classes and tiers
- Defining tier promotions for each tier

Setting Up Accruals

- Describing the roles of accrual and base promotions
- Creating a base promotion
- Creating accrual promotions

Configuring Redemptions

- Setting up airline and non-airline redemptions
- Managing redemption packages, vouchers, point loans, and points-to-pay conversion

Loyalty Products and Catalogs

- Creating loyalty products
- Creating a catalog and categories for loyalty products

Administering Member Services

- Describing loyalty member enrollment
- Performing member enrollment and services
- Implementing a member service using an admin promotion

Configuring Siebel Loyalty

Configuring Siebel Loyalty server components

Optimizing Siebel Loyalty performance with server keys and system preferences

Modifying lists of values to meet business requirements

Adding employees as Siebel Loyalty users

Siebel Loyalty Web Services

Describing Siebel Loyalty Web services

Publishing a Siebel Loyalty inbound Web service