



BF Overview Loyalty Points.doc

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1 Modification History

Date	Who	Comments
22-Jul-13	Solveda	Initial

2 Loyalty Points Overview

2.1 Document Purpose

- This document is not to be used for the actual requirements or specifications for the Loyalty Points feature
- Rather it is used to provide a high-level overview and indicate which specifications should be referenced

2.2 Feature Overview

- Loyalty Points are a retailers way of providing incentives for repeat business
- When customers purchase products they are credited with Loyalty Points
- Applying Points during check out
 - Points are retrieved
 - Converted to money
 - Applied to the Order Summary
 - At the Order-Item level
 - Reduces the price of the goods, sales tax and shipping charges are applied against the adjust item total
 - Balance, if any, is paid via another payment method
 - This is explained more fully in the "*BF Cart and Check Out.doc*" spec
- Within BigFish, the initial focus will be:
 - Identification and storage of the Loyalty Program Identifier
 - Specific to the customer
 - Web service based lookup of available points for redemption
- The retailer will have responsibility for:
 - Collection and addition of points will be the responsibility of the retailer
 - Consider offline sales (store, catalog etc.) accumulating additional points
 - Providing the web service details

3 System Parameters

- Spec "*BF Admin Module Admin.doc*", Appendix A

Key	Category	Description	Default Value
CHECKOUT_LOYALTY_METHOD	CHECKOUT	A value indicating if Loyalty Card redemptions are available during checkout and which service is to be used. Valid values are NONE and TENTEST (test that returns 10 points).	NONE
CHECKOUT_LOYALTY_CONVERSION	CHECKOUT	A value indicating the conversion of Loyalty Points to money. POINTS divided by CONVERSION equals MONETARY-VALUE. 100 points with a conversion of 10 would equal 10 monetary units.	1

4 eCommerce Considerations

4.1 Loyalty Points Identifier

- A PARTY_ATTRIBUTE will be used to identify the Loyalty Program #
 - ATTR_NAME = "LOYALTY_POINT_ID"
 - ATTR_VALUE = The Account or Program number
- For Clients who know their customers Loyalty Point ID it will be their responsibility to update this via a Feed process
 - This will use the structure CustomerAttribute
 - Name and Value
- This will be maintainable in various places within an eCommerce implementation:
- On Registration:
 - Part of the Customer Registration and Change Profile
 - Implemented as a "Optional Attribute"
 - Spec "*BF Customer Account Management.doc*"
 - Part of the DIV Sequencing Strategy
 - Page PersonalInfo
 - Spec "*BF Admin Module DIV Sequencer.doc*"
- On Checkout:
 - To provide an opportunity to display the Loyalty Points ID, and more importantly, allow a Customer to enter an ID if their ID is not already part of their User Profile
 - Offered optionally on "Show Cart" and "Order Summary" pages
 - spec "*BF Cart and Check Out.doc*"
 - Part of the DIV Sequencing Strategy

- Pages changed
 - ShowCart
 - OrderSummary
 - OnePageCheckout
- New attribute LoyaltyPoints
- Spec "*BF Admin Module DIV Sequencer.doc*"

4.2 **Order Items, showing the redemption**

- Within the Checkout flow, after a Loyalty Points action has taken place, the Order Items Summary component is updated to reflect the adjusted summary totals
 - Part of the DIV Sequencing Strategy
 - Pages changed:
 - ShowCartOrderItemsSummary
 - OrderSummaryOrderItemsSummary
 - OrderConfirmOrderItemsSummary
 - LightBoxOrderItemsSummary
 - New attribute LoyaltyDiscount
 - Also note usage change for attribute TotalAdjustAmount
 - spec "*BF Admin Module DIV Sequencer.doc*"

4.3 **Loyalty Points Redemption**

- If the Loyalty Point ID is known, or entered, then an appropriate Web Service is called in order to retrieve the number of points available
 - Conversion performed as per rules for parameter CHECKOUT_LOYALTY_CONVERSION to get monetary equivalent
 - Apply money to Order Summary to reflect adjusted balance
- On successful Order "Submit", adjust point balance remaining
- Spec "*BF Cart and Check Out.doc*"

5 **Feeds Considerations**

- Spec "*BF Admin Module Feeds.doc*"
- Order Export
 - Will include Loyalty Point Redemptions
- Customer Feed
 - Allows for import of PARTY_ATTRIBUTE.LOYALTY_POINT_ID
 - Already covered since attribute CustomerAttributes iterates through the PARTY_ATTRIBUTES and extracts ATTR_NAME, ATTR_VALUE

6 Admin Module Considerations

- Allows for view and edit of the PARTY_ATTRIBUTE.LOYALTY_POINT_ID
 - Spec "*BF Admin Module Customer.doc*"
 - 7/22: TODO
- Allows for similar redemption as the eCommerce implementation
 - Spec "*BF Admin Module Cart and Checkout.doc*"
 - 7/22: TODO
- Shows Loyalty as a adjustment in the Order Summary
 - Spec "*BF Admin Module Orders.doc*"
 - 7/22: TODO

7 Testing Loyalty Points

7.1 Using the TENTEST method

- To be used in the event that the actual web-service is not yet available for a specific client program
- Set system parameter LOYALTY_POINT_METHOD to "TENTEST"
- Enter any identifier during the Check-Out process
 - Or set the Loyalty-Point-ID to any non-blank value on the Customer Profile
- The Loyalty Points will be converted as per spec and applied to the Order Summary
- Pay the balance via Credit Card and Submit the Order