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ALP SaaS: New Release Highlights

Stay up-to-date with Notifications

You can now receive system notifications in your inbox! These are the system notifications that appear on the ALP-SaaS home page that relay information about upcoming releases or maintenance efforts). If you aren't in the tool frequently, this feature allows you to be aware of what's happening with the platform.

Go to **SYSTEM > NOTIFICATIONS** and then add your email or create an email group to receive the notifications via email. The Notify Event Name is, "[System Announcement Event] Announcement Notification".

January, 2018 – 2017.6

Clienteling

Clienteling is the location within the platform where customer service activities are performed. Administrators and CSRs will be able to support members and customer service scenarios within this area.
- ➢ There is a new member search filter for Member Birthday (YYYY-MM-DD).
- ➢ Within the "Tools" submenu, a user can trigger a "password help" message for individual members.

Head of Household

Within the usage settings, the limit that was there to previously restrict the number of Head of Household changes, was modified to "Dependent" additions instead.

If enabled, head of household functionality can be utilized.

- ➢ Max. Number of Dependents - The maximum number of dependents (up to 500) that a head of household can have in specified amount of calendar days.

- ➢ <u>Dependent Head of Household Change Limit - Limits the amount of head of household dependent member additions.</u>

- ➢ Head of Household Status Change Delay - Enforces a minimum delay on the amount of elapsed time for a dependent to become a head of household or vice versa.

Kiosk

The Kiosk Application is a standalone Windows program that fully integrates the host PC with the ALP SaaS database. Once installed and configured, the application offers a wide

array of options that facilitates interaction between loyalty members and the loyalty program.

➢ 2017 version of the standalone Kiosk software has been published. New version features enhanced graphics, improved feature-set and updated TLS support. Please contact Support for more details before proceeding with installation.

November, 2017 – 2017.5

Export

Composite Export – Points Expiring on Next Auto Expiration Date
➢ Learn more about Point Exportation in ALP SaaS by going to the wiki! https://wiki.smartbutton.com/default.asp?W191

Verification Code

This feature can be used to assist in the verification of a member enrollment and account data utilizing unique codes. The system will generate and message for this added security measure in verification.

➢ Find out more about Verification Codes here! - https://wiki.smartbutton.com/default.asp?W876

Segment

Two new member group rules were added to the system. (Member Group Rules are options for creating a segment group based on specific member attributes.)

➢ "Has Not Received Reward Assigned to Reward Descriptor for Date Range" (All)
➢ "Assigned to Member Descriptor" (Dynamic only)

September, 2017 – 2017.4

Member Ranking

"Transaction Type Descriptor" is a new capability to filter and be able to only see certain types of transactions. This adds an additional layer of granularity to the ranking.
➢ More transparent view to where members stand in ranking.
➢ Verified transactions – where you can determine even further if certain transactions count in the rankings. (Example: Certain promotions don't count because they were specific sale items).
➢ In clienteling you can view the ranking and where a member stands as well, it can be shown to the member which gives better communication and understanding.

Segmentation/Member Grouping Rules

New promotional campaign and membership rules. There are two new member grouping rules for use in grouping members based on their addresses. Additionally, the Postal/Zip

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codes for US & UK used in various segmentation rules have been updated with mid-late2017 data:

1. "US Metropolitan Statistical Area (MSA)"

2. "Canada Addresses Within x km of Postal Code (Center Postal Code method)"

Web Services

- ➤ MemberActiveRewardsWithRewardCustomFields
  - This will allow for the obtaining of any custom fields on top of all rewards information. (Any custom fields associated with the reward type are returned.) his will potentially allow for fewer calls to the system and provide an array of additional data that wasn't available in the standard calls previously.

  - Example: Address information could be returned.
- ➤ MemberEligibleVariableRewardsExtended
  - This service returns a list of all variable rewards that a member is eligible to receive.
- ➤ PointsToNextRecurringReward
  - Returns the amount of points a member needs to earn for their next recurring reward.
- ➤ MemberActiveRewardsWithRewardCustomFields
  - Retrieves all active rewards and their reward type custom fields for a specified member.

File Import

Multiple Transaction & Location - Day Based Simple Transaction File With Details and Transaction Custom Fields for issuing transactions to members from multiple locations, using multiple transaction types, with transaction custom field data. This would allow for partner information and location to be passed for understanding more about the transactions. Basically, the custom fields are now supported through the standard file.

For more information or questions please visit us at wiki.smartbutton.com or email us at customer-loyalty.na@aimia.com.

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ALP-SaaS: New Release Highlights

April, 2017

ALP-SaaS System Notifications: Reminder! You can receive system notifications in your inbox! (The system notifications that appear on the ALP-SaaS home page that relay information about upcoming releases or maintenance efforts.) If you aren't in the tool frequently, this feature allows you to be aware of what's happening with the platform.

You can go to *SYSTEM > NOTIFICATIONS* and then add your email or create an email group to receive the notifications via email. The Notify Event Name is, "[System Announcement Event] Announcement Notification".

Member Portal: The Member Portal is the public-facing website that is integrated with the ALP-SaaS product. This website allows direct access to the loyalty program with the primary purpose of allowing members to interact with the program. Members can perform a variety of tasks that include: reviewing transactional activity, accessing recent news content, changing account settings, accessing the reward store, and much more.

- Added new portal text items for the "Facebook Connect" login error page as well as Facebook Connect buttons.
- Existing module types, "General Settings" and "General Settings (View Only)" can be further configured to enable/disable the visibility of individual fields.
- Google Analytics tracking expanded to include enrollment and post-enrollment verification pages.
- New module type, "360 View", used for displaying coupon, reward and transaction activity within a single grid!
- New module type, "Upcoming Points Expiring", used for displaying the available points currently due to expire by way of automatic aged expiration (scheduled batches not included).

Location Groups: As previously discussed in release highlights, Location Groups can be used to replace location descriptors making some promotions easier within the platform.

- Promotions - The following promotions have been transitioned from using location descriptors to using location groups: o Parimutuel Transaction Bonus Promotion o Transaction Bonus Promotion o Transaction Product Bonus Promotion o Transaction Product Quantity Bonus Promotion
    - o Variable Point Back Promotion

- Segment - New location group functionality, used for grouping locations in order to export data. Location groups will slowly take the place of location descriptors within various promotions. The following rules will be included in the initial release:

    o Assigned to Location Descriptor (real-time supported) o Location Address

    Within Country o Location Address Within U.S. State o Location Address

    Within Canadian Province o US Address Within x Miles of Zip Code

    (Center Zipcode method) o UK Address Within x km of Outward Postcode

    district

    o Location Custom Field

WEB SERVICES

A number of updated or new web services to assist in easing integration from external systems to ALP-SaaS were added:

- New Member call, FetchMemberAccountIDs, used to retrieve a member's list of Account Ids.
- Web Services - New MemberReferrer call, FetchMemberReferrerInfo, for retrieving information about a member's referrer.
- Web Services - New MemberSecurity call, FetchMemberLastPasswordChangeDate, used to retrieve the date/time of the most recent password change for the member.

For more information or questions please visit us at wiki.smartbutton.com or email us at customer-loyalty.na@aimia.com.

May, 2017

Clienteling Services: The Clienteling Services area of ALP-SaaS is the customer service center of the platform. Customer Service Representatives can access clienteling and provide the support needed for members and program administrators. The items below were enhancements made within this release to the clienteling services area.

- **"Monthly Points Earned Trend"** - Once in the clienteling services area, if you go to the "Analysis & Statistics" sub-menu you can click on the monthly points earned trend. Once there, you can view the earning for that member for the last 24

- months, by month. This includes the number of days with visits, points earned, difference from last month, and a graph showing the points earned.
- **Member Clubs (Extended Module)** – Within clienteling you can customize the display for when you have selected a member. One of the new modules that you can choose to display, is the Member Clubs, which displays all the clubs that a member is assigned to. o The way to customize this to display (as well as any other extended module) is under the System menu title. System / Settings / Clienteling Settings
    - o Once in the Clienteling Settings, you can define the modules that you desire to be displayed within the "Extended Modules" section on the Clienteling Settings page. o Upon entering the edit page, you can customize the extended modules area of Clienteling Services as follows. o Smaller Modules - If enabled, you can select up to three of the following modules to display:
    - o Member Descriptors - Member descriptors that are configured for display, of which the member is assigned to Descriptors must be edited within their management page to enable their display within Clienteling Services.Member
    - o Promotional Groups - Promotional segment groups that are configured for display, in which the member is contained within Promotional Groups must be edited within their management page to enable their display.
    - o Member Ranking Levels - Member ranking set that are configured for display, in which the member is contained within. Ranking sets must be edited within their management page to enable their display.
    - o Member Ids - All member account Ids for the member will be displayed. o Member Clubs - All clubs that the member is currently assigned to.
    - o Member Reservations - The 7 most recent reservations registered by the member.
    - o Cases - The 7 most recent cases associated to the member.
    - o Undelivered Rewards - The 7 oldest rewards belonging to the member that do not have a delivery record.

Segment – Among other things, segmentation is critical to driving promotions, offers, communications, and content management. There were fourteen new member segment group rules added with this latest release.

- "Did not Purchase Product with Product Item Custom Field in Date Range" for four custom field datatypes (Drop Down, Checkbox, Integer, Money) - one rule per datatype.

- "Has Received Any Reward (All Types) for Date Range".

- "Has Not Received Any Reward (All Types) for Date Range".

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- "Not Included in Recurring Campaign".
- "Number of Transactions Received of Transaction Type Descriptor for Date Range".

- "Received Transaction with Product Item Custom Field" for four custom field datatypes (Drop Down, Checkbox, Integer, Money) - one rule per datatype.

- "Total Parimutuel Wagered on Tracks with Descriptor and Location Descriptor".

- "US Addresses NOT Within x Miles of Zip Code (Center Zipcode method)"

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