Free Questions for Salesforce-Loyalty-Management by dumpshq

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Question 1

Question Type: **MultipleChoice**

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

Options:

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

Answer:

A, C, E

Explanation:

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 2

Question Type: MultipleChoice

A Loyalty Manager would like to monitor members' tier history in the dashboards from Analytics Studio App.

Which two fields need to be enabled in field history tracking in the Loyalty Member Tier object for this to be achieved?

Options:

A- Loyalty Tier Group

B- Change Reason Type

C- Loyalty Tier

D- Reason for Change

Answer:

B, D

Explanation:

To monitor members' tier history in the dashboards from the Analytics Studio App, the two fields that need to be enabled in field history tracking on the Loyalty Member Tier object are:

Change Reason Type (B): This field captures the type of change (e.g., manual adjustment, system-generated change) that led to the tier change, providing context for the tier history.

Reason for Change (D): This field provides specific reasons for the tier change, offering detailed insights into why a member's tier was adjusted, which is valuable information for analyzing member behavior and program effectiveness.

Option A (Loyalty Tier Group) and Option C (Loyalty Tier) are important fields for understanding tier structures and member status, but they do not specifically relate to tracking changes or the reasons behind tier history, which are crucial for analytical purposes.

Salesforce documentation on Loyalty Management and Analytics would provide guidance on configuring field history tracking and leveraging Analytics Studio to create insightful dashboards that monitor and analyze members' tier history, aiding in strategic decision-making and program optimization.

Question 3

Question Type: **MultipleChoice**

What is the correct implementation approach for an Administrator to target a promotion only for specific products?

Options:

A- Create a custom list on the promotion

B- Map products to promotion through an out-of-the-box Related List

C- Create product attributes in Promotion Setup

D- Add promotion to the lookup field on the product

Answer:

B

Explanation:

To target a promotion only for specific products in a Loyalty Program, the correct implementation approach is to Map products to promotion through an out-of-the-box Related List (B). This approach leverages standard Salesforce functionality, allowing administrators to associate specific products with a promotion directly within the promotion's record. This direct mapping ensures clarity and ease of administration, enabling targeted promotional activities that are specific to certain products.

Option A (Create a custom list on the promotion), Option C (Create product attributes in Promotion Setup), and Option D (Add promotion to the lookup field on the product) are not standard Salesforce Loyalty Management functionalities for associating products with promotions and may require custom development or configuration that is more complex and less maintainable than using out-of-the-box related lists.

Salesforce documentation on Loyalty Management would detail the process for setting up and managing promotions, including how to associate promotions with specific products to achieve targeted marketing objectives within the Loyalty Program.

Question 4

Question Type: **MultipleChoice**

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?

Options:

A- Loyalty Analytics User

B- CLAAnalytics Base Admin

C- Data Pipeline User

D- CRM Analytics User

Answer:

A

Explanation:

To analyze the performance of the Loyalty Program, a System Administrator needs to set up and customize Loyalty Analytics, which requires the Loyalty 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 5

Question Type: MultipleChoice

The Loyalty Administrator for Northern Trail Outfitters (NTO) defines Basic and Premium as the two Tiers for its Insider program. They want to define a free product sample for all members in Premium Tier.

How does NTO configure tiers within the Loyalty Program to give vouchers for members in the Premium Tier?

Options:

A- Voucher Management and Benefit Action

B- Voucher Management and Benefits Setup

C- Voucher Management; Benefits Setup (in Program console); Benefit Action to define downstream actions and FLOW - Benefit action for orchestration

D- Voucher Management; Benefits Setup (in Program console); Benefit Action to process benefits

Answer:

C

Explanation:

To configure tiers within the Loyalty Program at Northern Trail Outfitters (NTO) for giving vouchers to members in the Premium Tier, the configuration involves Voucher Management; Benefits Setup (in Program console); Benefit Action to define downstream actions and FLOW - Benefit action for orchestration (C). This comprehensive approach allows for the creation and management of vouchers as benefits associated with the Premium Tier, the setup of these benefits within the Loyalty Program console to specify the conditions and entitlements, and the use of Salesforce Flow for orchestrating the process of issuing vouchers to qualifying members.

This method ensures that vouchers are systematically managed, associated with the correct tier and member eligibility criteria, and efficiently distributed to members through automated processes, enhancing the value and appeal of the Premium Tier.

Salesforce documentation on Loyalty Management would detail the steps for setting up and managing tier-based benefits, including the use of Voucher Management and Flow for effective benefit administration and member engagement.

Question 6

Question Type: MultipleChoice

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?

Options:

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

Answer:

C

Explanation:

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 should Set 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 not consider 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 7

Question Type: MultipleChoice

The Loyalty Administrator for Northern Trail Outfitters (NTO) Insider program defines tier groups - Status Tier Group with a Fixed Model and Period of one year. The three tiers are defined - Silver (base), Gold (next tier), and Platinum (the highest tier).

Qualifying Points reset date is set at December 31,2022, with a frequency of one year.

Extend Expiration for this tier group is Qualifying Points Reset Date.

A member joins NTO Insider in the Silver tier and, after a year of engagement, gets upgraded to the Gold tier on March 16, 2023.

Which date would be the new Expiry date for this member after the tier is upgraded to Gold?

Options:

A- December 31. 2023

B- March 16,2024

C- December 31,2024

D- March 31, 2024

Answer:

C

Explanation:

For a member who joins the NTO Insider program in the Silver tier and gets upgraded to the Gold tier on March 16, 2023, the new expiry date after the tier upgrade would be December 31, 2024 (C). This is because the tier group is defined with a Fixed Model and a Period of one year, with the Qualifying Points reset date set at December 31, 2022, and a frequency of one year. The Extend Expiration setting being tied to the Qualifying Points Reset Date means that regardless of when the tier upgrade occurs within the year, the expiration of the new tier status aligns with the annual reset date, extending to the end of the following reset period, which would be December 31, 2024.

This approach ensures that members who achieve a higher tier partway through the year enjoy the benefits of that tier for the remainder of the current year plus the entire next year, providing a full year's benefit from the point of the annual reset.

Salesforce documentation on Loyalty Management would outline the functionality and configuration options for tier groups, tier upgrades, and expiration settings, guiding administrators on setting these up to meet the program's strategic objectives and ensure clarity and fairness for members.

Question 8

Question Type: **MultipleChoice**

A hotel group has implemented a Loyalty Member Portal for its program members, but some members are experiencing issues accessing their Loyalty Program-specific records on the portal.

What should an Administrator do to ensure the Loyalty members can access Loyalty record information when using the portal?

Options:

A- Using Experience Cloud sharing sets, specify Account as the object of your sharing set

B- Ensure the Allow using standard external profiles for self-registration, user creation, and login' is enabled

C- In the Partner Account record, 'Enable Customer User' on the Contact associated

D- For the Loyalty Member, 'Enable Customer User' on the Contact or 'Enable Partner User' on the Account

E- Ensure the 'Allow using customer profiles for self-registration, user creation, and login' is enabled

Answer:

A, D

Explanation:

To ensure Loyalty members can access their program-specific records on the Loyalty Member Portal, an Administrator should:

Using Experience Cloud sharing sets, specify Account as the object of your sharing set (A): Sharing sets in Experience Cloud allow you to define access rules for external users based on their relationship to records in Salesforce. Specifying Account as the object in a sharing set can enable portal users to access their Loyalty Program information if their portal user account is linked to their Account record in Salesforce.

For the Loyalty Member, 'Enable Customer User' on the Contact or 'Enable Partner User' on the Account (D): Enabling a Customer or Partner User on the Contact or Account associated with the Loyalty Member allows that individual to access the portal. This step is crucial for granting Loyalty Program members the ability to log in and view their Loyalty Program-specific information.

Options B and C, while related to portal access and user setup, do not directly address the specific requirement of accessing Loyalty Program information. Option E is also relevant but more focused on enabling self-registration and user creation/login processes rather than directly impacting access to Loyalty record information.

Salesforce documentation on Experience Cloud and Loyalty Management would provide guidance on setting up and configuring access for Loyalty Program members to view their information on a member portal, ensuring a seamless user experience.