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# Question 1

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**Question Type:** MultipleChoice

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A hotel group has finished setting up its Loyalty Program and now wants to provide its Loyalty members with live updates about their program membership. They are looking for a solution that lets members view their membership details whenever, they want to, and expect that this can be implemented without a need for complex customization. Using the available product features of Loyalty Management, Which three tasks should an Administrator implement to meet the Hotel group's requirements?

## Options:

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- A- LoyaltyBenefits
- B- LoyaltyLedger
- C- Contact Record
- D- TransactionJournal
- E- LoyaltyMemberTier

## Answer:

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B, C, E

## Explanation:

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To meet the hotel group's requirements for providing live updates to Loyalty members about their program membership without complex customization, the following three tasks should be implemented:

**LoyaltyLedger:** This feature allows members to view their points balance and transaction history<sup>1</sup>. It is a key component of the Loyalty Management product that tracks the accumulation and redemption of loyalty points, which is essential for members to stay informed about their membership status.

**Contact Record:** Maintaining up-to-date contact records is crucial as it ensures that members can receive notifications and access their membership details<sup>1</sup>. The contact record in Salesforce is the central repository of member information, which can be used to personalize communication and provide members with relevant updates.

**LoyaltyMemberTier:** Implementing the LoyaltyMemberTier feature enables members to see their current tier status and understand how they can move to the next tier<sup>1</sup>. This feature motivates members to engage more with the loyalty program by providing them with clear goals and benefits associated with each tier.

These features are part of the Salesforce Loyalty Management application and are designed to enhance customer engagement without requiring extensive customization. They enable the hotel group to provide a seamless experience for members to access their loyalty program details.

## Question 2

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**Question Type:** MultipleChoice

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A Loyalty Manager would like to set up an email-send process in Salesforce Marketing Cloud (SMC) that needs to inform the member via email immediately once a tier change has been applied. The company is using Marketing Cloud Connect.

A solution was proposed to draft a design using a journey process to send the notification email and a new custom object named "Member TierUpdate\_c" that stores the members that are qualified for a tier upgrade.

Which data source options within the journey should a Consultant use to fulfill this design?

**Options:**

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- A- 'Salesforce Data' as the Entry Source, 'Loyalty ProgramMember' object as the datasource
- B- 'Salesforce Data' as the Entry Source, 'Contact' object as the data-source
- C- 'Data-Extension' as the Entry Source, 'LoyaltyProgramTier'
- D- 'Salesforce Data' as the Entry Source, 'LoyaltyMember Tier'

**Answer:**

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D

**Explanation:**

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For integrating a custom object 'Member TierUpdate\_c' with a journey in Salesforce Marketing Cloud for real-time tier change notifications, the correct data source option is:

Option D 'Salesforce Data' as the Entry Source, with the custom object 'Member TierUpdate\_c' as the data source. This option allows for real-time triggering of journeys in Marketing Cloud based on updates to Salesforce records, in this case, the 'Member TierUpdate\_c' object which tracks tier upgrades.

Options A and B do not correctly target the custom object designed to track tier changes.

Option C, using a 'Data-Extension,' would not provide the real-time integration needed for immediate email notifications upon tier changes.

## Question 3

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**Question Type: MultipleChoice**

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A company has recently rolled out the Loyalty Program in the production environment. The Loyalty Manager is unable to edit any Loyalty Management objects.

What permission set license is required to edit the Loyalty Management Objects?

## Options:

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- A- CLAAalytics Base User
- B- Loyalty Management
- C- Data Pipelines Base User
- D- CLAAalytics Base Admin

## Answer:

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B

## Explanation:

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To edit Loyalty Management objects, the 'Loyalty Management' permission set license is required. This license grants users the necessary permissions to access and modify Loyalty Management-specific data and configurations.

Option B 'Loyalty Management' is the correct answer as it directly relates to the permissions needed to work with Loyalty Program configurations and objects within Salesforce.

Options A, C, and D pertain to analytics and data pipeline functionalities and do not grant permissions to edit Loyalty Management objects.

## Question 4

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### Question Type: MultipleChoice

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A new segment in Customer Data Platform (CDP) will be used for sending notification emails to members with the following requirements: - The mail is sent

on the first day of the month to the members that will have their membership expire at the end of the same month, starting from the 1st of April to 30th of June

- member's expiry-date are standardized to the last day of the month.

Which two configuration options below should be used for the new segment to fulfill this segmentation requirement?

### Options:

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**A-** In 'Segment Property', set 'Publish Schedule' to 'Don't Refresh'.

**B-** In the Segmentation Rule, Use 'LoyaltyProgramMember' as the Direct object, > Operator: 'This Month' for the 'Membership Expiry Date' attribute.

**C-** In the Segmentation Rule, Use 'LoyaltyProgramMember' as the Direct object, > Operator: 'Next Number of days' = 30 for the 'Membership Expiry Date' attribute.

**D-** In 'Segment Property,' set 'Publish Schedule' to '24 hours' and the appropriate 'Start Date' and 'End Date'

## Answer:

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B, D

## Explanation:

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For this segmentation requirement, the key is to identify members whose membership will expire at the end of the current month and to ensure the segment is refreshed daily within the specified date range.

Option B is correct because using 'This Month' for the 'Membership Expiry Date' attribute will accurately segment members whose memberships expire at the end of the current month.

Option D is also correct because setting the 'Publish Schedule' to '24 hours' ensures the segment is refreshed daily, capturing new members meeting the criteria as the month progresses. The 'Start Date' and 'End Date' should be set from the 1st of April to 30th of June to match the requirement.

Option A is not suitable because 'Don't Refresh' would prevent the segment from updating daily, which is necessary to capture new members as their membership expiry dates become relevant.

Option C using 'Next Number of days' = 30 might incorrectly include members whose memberships expire in the next 30 days from the current date, not specifically at the end of the current month.

## Question 5

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**Question Type: MultipleChoice**

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A member reaches out to the Member Services team regarding points that have expired and requests to restore them. The Loyalty program has a fixed model expiration for non-qualifying points.

How should the Member Services Agent restore the expired points and also set them to expire in the next two months?

**Options:**

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- A-** Delete the transaction journal that expired the points and re-run the expiration Data Processing Engine job after two months
- B-** Use 'Adjust Points' action on Loyalty Program Member page to credit points and select the Points Expiration Date as two months from the current date
- C-** Edit the 'Credit' ledgers corresponding to the points that expired and extend the expiration date to two months from the current date
- D-** Edit the Loyalty Member Currency record to restore the Points Balance and set the 'NextExpirationDate' field to two months from the current date

**Answer:**

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B

**Explanation:**

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To restore expired points for a member in a Loyalty program with a fixed model expiration for non-qualifying points and set them to expire in the next two months, the Member Services Agent should:

Use 'Adjust Points' action on Loyalty Program Member page to credit points and select the Points Expiration Date as two months from the current date (B): This action allows for the direct adjustment of the member's points balance, including the ability to specify a new expiration date for the credited points. It's a straightforward and effective way to restore expired points and set a new expiration date, aligning with the member's request.

Deleting the transaction journal that expired the points (option A), editing the 'Credit' ledgers (option C), or editing the Loyalty Member Currency record (option D) are not standard practices for restoring expired points and setting a new expiration date in Salesforce Loyalty Management.

Salesforce documentation on Loyalty Management would detail the process for adjusting points, including how to handle requests for restoring expired points and setting new expiration dates, ensuring member satisfaction and program integrity.

## Question 6

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**Question Type:** MultipleChoice

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An Administrator uses Analytics for Loyalty to develop an InApp-Dashboard showing top and bottom agent performers on the Loyalty call center.

Which dashboard readily available through the Analytics Studio tool can be used to track agents' performance based on the number of members assisted, customer satisfaction scores, and modifications?

**Options:**

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- A- Program Manager Home Dashboard
- B- Member Services Manager Home Dashboard
- C- Team Performance Dashboard
- D- Loyalty Member Services Dashboard

**Answer:**

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D

**Explanation:**

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To develop an InApp-Dashboard showing top and bottom agent performers in the Loyalty call center, the most suitable dashboard available through the Analytics Studio tool is the:

Loyalty Member Services Dashboard (D): This dashboard is designed to track the performance of agents interacting with loyalty program members, including metrics like the number of members assisted, customer satisfaction scores, and modifications made by agents. It provides insights into agent performance and service quality in the context of loyalty member services.

The Program Manager Home Dashboard (option A), Member Services Manager Home Dashboard (option B), and Team Performance Dashboard (option C) may contain relevant metrics but are not specifically tailored to tracking individual agent performance in the context of loyalty member services.

Salesforce documentation on Analytics for Loyalty would provide information on available dashboards and their intended use cases, including how to customize and leverage them for specific analytical needs, such as tracking call center agent performance.

## Question 7

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**Question Type:** MultipleChoice

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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?

### Options:

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**A-** Personalized digital marketing

**B-** Transaction journey data is automatically archived

**C-** Customers are rewarded based on their tiers

**D-** Data-based segmentation strategy

### **Answer:**

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A, D

### **Explanation:**

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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 8

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**Question Type:** MultipleChoice

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A sports clothing and accessories retailer is setting up a new Loyalty program. The company wants an effective way to create urgency in its Loyalty program members to return to purchase and redeem their points within a specified period. The entire points balance expires if a member's last activity, including any purchase or points redemption, reaches 18 months.

What steps should a Loyalty Consultant follow to meet the retailer's requirement when implementing the new Loyalty program?

### Options:

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- A- Set up a Non-Qualifying Points currency and apply the expiration model 'Fixed Model'
- B- Set up a Qualifying Points currency and apply the expiration model 'Activity Model'
- C- Set up a Non-Qualifying Points currency, apply the expiration model 'Activity Model'
- D- Set up a Qualifying Points currency and apply the expiration model 'Fixed Model'

### Answer:

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C

### Explanation:

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To create urgency for Loyalty program members to return and redeem their points within a specified period, where the entire points balance expires if a member's last activity reaches 18 months, the Loyalty Consultant should:

Set up a Non-Qualifying Points currency, apply the expiration model 'Activity Model' (C): This setup allows for the expiration of Non-Qualifying Points based on member activity, specifically if there is no purchase or points redemption activity within an 18-month period. The Activity Model is used to track the last activity date and trigger expiration based on this inactivity period.

Setting up a Non-Qualifying Points currency with a 'Fixed Model' expiration (option A), a Qualifying Points currency with either 'Activity Model' (option B) or 'Fixed Model' expiration (option D), would not meet the retailer's requirement for creating urgency based on the last activity.

Salesforce documentation on Loyalty Management would provide guidance on configuring expiration models for loyalty currencies, ensuring that program objectives, such as encouraging regular member engagement, are achieved.

## Question 9

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**Question Type: MultipleChoice**

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A company is designing a new Loyalty Program to reward its members based on purchases and short-term and long-term engagement with the program.

Which two types of currency does Salesforce Loyalty Management offer out-of-the-box that can be configured to accomplish the company's Loyalty Program objectives?

## Options:

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- A- Fixed Model and Activity Model
- B- Non-Qualifying Points and Qualifying Points
- C- Non-Qualifying Points and Activity Points
- D- Fixed Model and Qualifying Points

## Answer:

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B

## Explanation:

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Salesforce Loyalty Management offers two types of currency out-of-the-box that can be configured to accomplish the company's objectives for rewarding members based on purchases and engagement:

Non-Qualifying Points and Qualifying Points (B): Non-Qualifying Points are typically used for redemption purposes, allowing members to redeem these points for rewards or benefits. Qualifying Points, on the other hand, are often used to determine a member's tier or status within the loyalty program, often based on their purchases or engagement activities.

Fixed Model and Activity Model (option A), Activity Points (option C), and Fixed Model in combination with Qualifying Points (option D) are not types of currency offered by Salesforce Loyalty Management. The system specifically uses Non-Qualifying and Qualifying Points to differentiate between points that contribute to tier status and those available for redemption.



Salesforce documentation on Loyalty Management would detail the configuration and use of these currencies within a loyalty program, including how they can be tailored to meet specific program objectives.

## Question 10

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**Question Type:** MultipleChoice

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Which two actions should an Administrator execute when a tier is changed manually?

### Options:

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- A- Process Member Benefit Action
- B- Create a scheduled job to perform tier change.
- C- Assign Member Tier Benefits Action
- D- Process Transaction Journals batch job

### Answer:

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A, C

## **Explanation:**

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When a tier is changed manually in Salesforce Loyalty Management, an Administrator should execute the following two actions:

Process Member Benefit Action (A): This action ensures that any benefits associated with the new tier are correctly processed and applied to the member. It's essential for maintaining the integrity of the loyalty program and ensuring members receive the appropriate benefits for their new tier.

Assign Member Tier Benefits Action (C): This action assigns the benefits specific to the newly assigned tier to the member. It's crucial for updating the member's benefits to align with their new tier status, ensuring they receive all entitlements associated with their new level.

Creating a scheduled job to perform the tier change (option B) and processing Transaction Journals batch job (option D) are not directly related to the manual tier change process. The focus should be on ensuring that member benefits are correctly assigned and processed in response to the tier change.

Salesforce documentation on Loyalty Management would provide detailed guidelines on managing tier changes, including the actions required to ensure member benefits are correctly updated.

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