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Salesforce Loyalty-Management Exam Syllabus Topics:

Topic	Details
Topic 1	<ul style="list-style-type: none">On-Going Loyalty Management: This section equips Salesforce Partners to sustain and optimize Loyalty solutions post-implementation. The topic includes leveraging analytics and dashboards, transitioning from sandbox to production, managing Loyalty campaigns, utilizing mobile app features, and resolving service-related issues.

Topic 2	<ul style="list-style-type: none"> Strategies and Design: Salesforce Partners learn how Loyalty Management aligns with customers' business needs, processes, data requirements, and program parameters. This section includes identifying the appropriate Loyalty architecture, defining points and redemptions processes, benefits types, and the promotion lifecycle. Best practices for implementing Loyalty Management are also covered, ensuring practical application to real-world scenarios.
Topic 3	<ul style="list-style-type: none"> Integration: Integration is crucial for a seamless Loyalty Management experience. In this topic, Salesforce Partners determine strategies for integrating Marketing Cloud, Commerce Cloud, Service Cloud, Salesforce CDP, and external systems using API templates and endpoints.
Topic 4	<ul style="list-style-type: none"> Loyalty Program and Process Configuration: This section focuses on configuring the foundational and advanced features of Loyalty Programs. Salesforce Partners learn to configure tier models, member and partner management, customer incentives, and experiential features in this topic. Sub-topics also include defining promotions, eligibility rules, and personalized Loyalty pages using Experience Cloud templates. Configuring complex processing rules, user access models, and analytics dashboards equips Salesforce Partners with the expertise to deliver scalable, customer-centric Loyalty solutions.

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Salesforce Loyalty Management Accredited Professional Exam Sample Questions (Q50-Q55):

NEW QUESTION # 50

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?

- A. 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. Delete the transaction journal that expired the points and re-run the expiration Data Processing Engine job after two months
- C. Edit the Loyalty Member Currency record to restore the Points Balance and set the 'NextExpirationDate' field to two months from the current date
- D. Edit the 'Credit' ledgers corresponding to the points that expired and extend the expiration date to two months from the current date

Answer: A

Explanation:

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.

NEW QUESTION # 51

Universal Containers (UC) plans to implement Salesforce Loyalty Management for a new Loyalty program; however, its operations team remains skeptical about the Loyalty solutions, such as rules, processes, and benefit types.

Which option should UC consider when planning its implementation to ensure staff is helping to boost adoption and engagement?

- A. Define a strategy led by marketing and involving the finance team
- B. Define a strategy led by marketing and involving the analytics team
- **C. Define a company-wide initiative, including an operations team**
- D. Describe the initiative to the Chief Marketing Officer team for their approval

Answer: C

Explanation:

To ensure staff buy-in and boost adoption and engagement with the new Loyalty Program, Universal Containers should:

D: Define a company-wide initiative that includes the operations team. Engaging all relevant departments from the outset ensures a holistic approach to the implementation and addresses concerns and skepticism by involving those who will be directly impacted by the new Loyalty solutions.

NEW QUESTION # 52

A company's Marketing Team needs to set up a promotion and use Promotion Market Segments where members of a specific age range and with expressed preferences will benefit from this promotion.

What is the recommended solution for the team to set up the Promotion Market Segments?

- A. Salesforce Reports and Dashboards
- B. Salesforce Marketing Cloud
- C. Custom coded solution
- **D. Salesforce Customer Data Platform**

Answer: D

Explanation:

To set up Promotion Market Segments for members within a specific age range and with certain preferences, the recommended solution is:

D: Salesforce Customer Data Platform (CDP), which allows for the creation of detailed segments based on a wide range of criteria, including demographic data and expressed preferences.

NEW QUESTION # 53

An IT Administrator has received a request from the Customer Service team to enable agents to view the Loyalty Program Member information on a Case record in Service Cloud.

What steps should the Administrator take to configure this?

- A. On the Case Page Layout, the Loyalty Program Member Related Lists are available and should be directly embedded to show the Loyalty information
- B. On the Case Page Layout, the 'View Related Membership' action should be added to the Highlights panel and the Loyalty information to be displayed should be selected
- **C. On the Case Page Layout, the 'View Member Profile' component should be added and the required Related Lists from Loyalty Program Member should be selected**
- D. On the Case Page Layout, the Related Record component should be added with the 'First Lookup' selected as the 'Loyalty Program Member'

Answer: C

Explanation:

To enable agents to view Loyalty Program Member information on a Case record in Service Cloud, the IT Administrator should On the Case Page Layout, add the 'View Member Profile' component and select the required Related Lists from Loyalty Program

Member (B). This component allows for the display of relevant Loyalty Program Member information directly within the context of a Case record, enhancing the service agent's ability to access pertinent loyalty information while managing customer cases.

NEW QUESTION # 54

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

- A. Create product attributes in Promotion Setup
- B. Map products to promotion through an out-of-the-box Related List
- C. Create a custom list on the promotion
- 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.

NEW QUESTION # 55

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