

«PointLoyalty Manager» User Manual

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1. Introduction.

1.1. What is «PointLoyalty Manager».

«PointLoyalty Manager» is the software product, which is made for creation of bonus loyalty programs, organization of data transfer for bonus calculations to user's clients.

The given document contains review of application's functional opportunities, the description of using rules and examples of work with screen forms.

If you have any questions concerning the using of «PointLoyalty Manager», please, address to the support service of the Company support@pointloyalty.ru.

1.2. Work sequence with «PointLoyalty Manager».

1.2.1. Step 1. Business general description.

At the beginning of work with «PointLoyalty Manager», it's necessary to define in the system the simplified model of your business cooperation with clients, i.e. to describe those actions of your clients, for which you plan to calculate bonuses.

On the base of given model you'll be able to create the loyalty programs and offers in your business terms.

Business description includes the following sections:

- Description of client actions' templates – binding section.
- Description of clients attributes – optionally.
- Clients' data base support - optionally.
- Description of user classes – optionally.

All sections listed above will be described in details in the due paragraphs of the present document.

1.2.2. Step 2. Creating of loyalty programs and offers.

At this stage it's necessary to create the loyalty programs and offers according to which your clients' bonuses will be calculated.

It's impossible to create programs and offers without preliminary description of client actions' templates.

1.2.3. Step 3. Data input for calculations

After creating programs and offers it's necessary to input into the system the on-line data which reflect your business cooperation with your clients. The bonuses will be calculated on the ground of input data.

Method of data input into the system:

- Manual input.
- Data coping from the Office documents.
- Download data files.
- Automatic data receiving from your FTP server.
- Integration with your software products (web services).

2. System's points.

2.1. Business general description.

2.1.1. Description of client actions' templates.

Definition.

Client action's template – the named set of attributes, which characterize the process of your business cooperation with clients in frames of some business relations.

The templates define the structure of real data, under **which the bonuses are calculated.**

Examples.

If your business is “trade”, the example of client action for it will be “purchase”.

Example of actions attributes’ set:

- *Purchase date.*
- *Goods’ name.*
- *Price.*
- *Goods’ quantity.*
- *Etc.*

If your business - «Internet content providing», the example of client action for it will be «file transfer».

Example of actions attributes’ set:

- *Receiver’s IP address.*
- *Receiver account.*
- *File size.*
- *Etc.*

Each client action’s attribute is characterized by data name and type.

Supported data types.

- String value.
- Integral number.
- Real number.
- Boolean value.
- Date.
- Date and time.
- Time.

The information about attribute’s data type is necessary for making correct rules of loyalty offers, which are based on client actions’ attributes.

If you record the real client’s actions data, these data by their structure have to correspond to actions’ templates with one additional field – client’s identifier, which is necessary to define the belonging of real action.

After creating of client actions’ templates, which are typical for your type of business, you can create the loyalty offers in the familiar terms:

Example of the offer for action “purchase”:

- 5 bonuses
- To all who bought “milk” (attribute «Goods’ name»)
- On the 2nd or 3rd of July, 2009 year (attribute «date of purchase»).

Comments.

The description of client actions’ template – the obligatory procedure at the beginning of work with the system. Without prepared templates in the system it’s impossible to create the loyalty programs and offers.

Creation and revisions.

Creation and revisions of client operations’ templates are made using the screen form “Business information/Client operations’ templates” (see item [3.2.1](#)).

2.1.2. Description of clients’ attributes.

Definition.

Clients' attributes – features which characterize your clients and using which you can create loyalty offers.

Examples.

If you dispose your clients' data base with the following attributes:

- Date of birth.
- Sex.
- Marital status.
- Etc.

then after registration the attributes in the system you will be able to create three loyalty offers for the concrete types of clients.

Offer's example:

- 5 bonuses
- For any purchases made by clients born on 14th February (client's attribute: "date of birth").

Each attribute is characterized by naming and data type (set of supported data types – see item [2.1.1](#)). The information about type of attribute's data is necessary for possibility of proper creation of loyalty offers' rules, based on clients' attributes.

Comments.

- Optionally. Used when it's necessary to create loyalty programs and offers, which take into account the characteristics of your clients.
- Please, pay attention that for creating such offers you also have to transfer clients' data into the system. See item [2.1.3](#).

Creation and revisions.

Creation and revisions of clients' attributes are made using the screen "Business information/"Clients' attributes" (see item [3.2.2](#)).

2.1.3. Clients' data base support.

Definition.

Clients' data base – list of your clients with data fields which correspond to the clients' attributes registered in the system.

Examples.

Suppose that you dispose your clients' data base and would like to create loyalty offer for the concrete types of clients.

At the first stage it's necessary to describe in the system clients' attributes (item [2.1.2](#)).

Example of attributes' set:

- Date of birth.
- Sex.
- Education.
- Etc.

Further, it's necessary to transfer into the system the client's data on the base of described attributes.

Example of client Smith:

- 02.17.1990 (Date of birth).
- Male (Sex).
- Student (Education).
- Etc.

Offer's example based on clients' attributes:

- 5 bonuses
- to all buyers - students (to buyers with the attribute «education» – «student»).

Operations' data entering into the system may be without client's characteristics.

Data examples:

- *Date of purchase* – 01.01.2009 20:43:11.
- *Client* –Smith.
- *Etc.*

While data processing the calculation system will define the client's attribute "education" – "student" and bonus for the operation will be calculated.

Comments.

Optionally. Used when it's necessary to create loyalty programs and offers which take into account the characteristics of your clients.

Creation and revisions.

Creation and revisions of clients' attributes are made using the screen "Business information"/"Clients" (see item [3.2.3](#)) or using data files transfer (see item [3.3](#) and [3.4](#)).

2.1.4. Description of user types.

Definition.

User types – groups of your goods and services or other data types, on the base of which you'll be able to create loyalty offers.

Each category may contain set of values and list of subcategories (tree-type structure of data).

Examples.

Goods' categories of food store:

- Food products:
 - Dairy products:
 - Set of values – the list of concrete goods:
 - Milk.
 - Yoghurt.
 - Etc.
 - Convenience food:
 - Meat convenience food:
 -
 - Fish convenience food:
 -
-
- Tying products:
 - Printed matter:
 -
 - Hardware goods:
 -

Goods and services categories.

The most frequent case of using the user categories –when you transfer into the system the list of goods and services, rendered by your Company, in order to create loyalty offers, based on categories' data.

Examples.

Suppose that you dispose of the list of your goods and services categories and would like to create loyalty offer using given categories.

Examples of categories:

- *Category “Dairy products”*. Includes: all sorts of milk, yoghurt etc.
- *Category “Bakery goods”*. Includes: all sorts of bread, cookies etc.

After defining the list of categories in the system, you can create the loyalty offer, based on goods’ categories.

Offer example:

- 5 bonuses
- to all who bought dairy products (goods’ category “Dairy products”).

Operations’ data entering into the system may be without goods’ characteristics.

Data examples:

- Date of purchase – 01.01.2009 20:43:11.
- Goods - milk.
- Etc

While data processing the calculation system will define the goods’ category (“milk” – “dairy products”) and bonus for the operation will be calculated.

Data categories.

Data categories can be applied in wider sphere.

For instance, you can define the category for any attribute type “date” - “days of bonuses’ payment” for the certain year:

- 02.01.2009 – Day of your Company establishment.
- 03.08.2009 – International Women’s Day.
- Etc.

Offer’s example:

- 5 bonuses
- to all who bought any goods in “days of bonuses’ payment” (category “days of bonuses’ payment” of client operation’s attribute “date of purchase”).

Operations’ data entering into the system may be without information about attribute’s category “Date of purchase”.

Data example:

- Date of purchase - 02.01.2009.
- Goods – DVD.
- Etc.

While data processing the calculation system will define the attribute’s category “date of purchase” (02.01.2009-> “Day of your Company establishment”), and bonus for the operation will be calculated.

Comments.

Optionally. Using when it’s necessary to create loyalty programs and offers taking into account user categories.

Creation and revisions.

Creation and revisions of user categories are made using the screen “Business information”/“User categories” (see item [3.2.4](#)) or using data files transfer (see item [3.3](#) and [3.4](#)).

2.2. Loyalty programs and offers.

2.2.1 Programs.

Definition.

Loyalty program – one or several loyalty offers organized into logical group by user for easy work.

Program's characteristics.

- Name and description. Name – mandatory attribute, description – optional one.
- Validity. Mandatory attribute.
- Program's status. Active/Blocked. For a blocked program's offers bonuses are not calculated.

Examples.

Program “summer season” includes:

- Offer – bonuses for the sport goods purchases.
- Offer – bonuses for the traveling kit purchases.

2.2.2. Offers. General information.

Definition.

Loyalty offer – one or several rules, defining the mechanism of bonus calculation for clients operations.

Offer's base characteristics.

- Name and description. Name – mandatory attribute, description – optional one.
- Client's operation. Mandatory attribute. Parameter, defining client operations for which bonuses will be calculated within the given offer.
- Validity. Mandatory attribute. Can't exceed the validity of program.
- Bonuses calculation scheme. There 2 calculation schemes in the system: percentage and absolute scheme.

If you use the percentage scheme it's necessary to choose the numeric type of attribute from the set of client operation attributes and to define the percent which will be calculated from its value as a bonus.

If you use the absolute scheme it's necessary to define the size of calculated bonus in absolute units.

- Offer's status. Active/Blocked. For blocked offers bonuses are not calculated.

Examples.

- “Bonuses to everybody” (offer's name).
- Is valid for all purchases («purchase» – client operation).
- Valid from 01.01.2010 till 01.31.2010 (validity).
- 5 % from the purchase amount charged as a bonus to all clients. (The percentage scheme of bonus calculation is brought into play, calculation attribute – field «amount» of client operation «purchase»).

Besides base characteristics, an offer has to contain one or several rules which define the bonus calculation's conditions.

Type of rules.

- Rules of client operations' calculation.
- Rules of clients' filtration.
- Rules of registration of client operations' history.

2.2.3. Rules of calculation of client operations.

Description.

Rules of calculation of client operations define the conditions of bonuses calculations for the clients, whose operations contain the attributes with satisfied to the definite criteria values.

To create a rule it's necessary to choose the client operation's attribute and define for it the condition at which the rule works.

Rules' examples.

- To calculate the bonus on the client operation "lease" the attribute value "date of agreement" has to be equal to «01.02.2008».
- To calculate the bonus fro the client operation "purchase", the attribute value "amount" has to be more than 500 units.

The list of available types of conditions depends on type of chosen attribute's data.

Variants of conditions according to type of given attribute:

Data type	Supported type of condition
String value.	<ul style="list-style-type: none"> • Equality. • Equality ignoring small and capital letters. • Entering into the set of value. • Entering into the set of value, ignoring small and capital letters. • Rule of regular expressions. • Entering into the set of value of any user category.
Integral number. Real number.	<ul style="list-style-type: none"> • Equality. • More than. • More than or equal to. • Less than. • Less than or equal to. • Entering into the set of value. • Entering into the set of intervals of values. • Entering into the set of value of any user category.
Bulian value.	<ul style="list-style-type: none"> • Equality. • Entering into the set of value of any user category.
Date. Date and time.	<ul style="list-style-type: none"> • Equality. • More than. • More than or equal to. • Less than. • Less than or equal to. • Entering into the set of value. • Entering into the set of intervals of values. • Entering into the set of value of any user category. • Week day. • Month day.
Time	<ul style="list-style-type: none"> • Equality. • More than. • More than or equal to. • Less than. • Less than or equal to. • Entering into the set of value. • Entering into the set of intervals of values. • Entering into the set of value of any user category.

Comments.

Please, pay attention that creation of rules using user categories is possible only after their identification in the system. See item [2.1.4](#).

2.2.4. Rules of clients' filtration.

Description.

Rules of clients' filtration define the conditions of bonuses calculation to the clients, whose characteristics (attributes' values) satisfy the definite criteria.

To create a rule it's necessary to choose a client's attribute and to define for it the condition at which the rule works.

Rules' examples.

- To calculate the bonus on the client's operation the client attribute's value "date of birth" has to be less than 01.01.1998.
- To calculate the bonus on the client operation the client attribute's value "education" has to be equal to "student".

The list of available types of conditions depends on type of chosen attribute's data (as in [2.2.3](#)).

Comments.

- Please, pay attention that creation of rules of clients' filtration is possible only after client attribute's identification in the system. See item [2.1.2](#).
- The creation of rules using user categories is possible only after their identification in the system. See item [2.1.4](#).
- If client's data are not input into the system bonuses won't be calculated for the offers with rules of clients' filtration

2.2.5. Rules of registration of client operations' history.

General description.

Rules of registration of client operations' history define the conditions of bonuses calculation to the clients who has the registered in the system operations for the prior period of time which correspond to the definite criteria.

Examples.

To calculate the bonuses on a client operation it's necessary the client has already made some purchases during the period from 01.01.2007 till 01.31.2007.

Rule of registration of client operations' history contain 3 blocks:

- Time interval of operation's registration.
- Aggregation block.
- Block of restrictions.

Time interval of operation's registration.

To create the history rule the client operation has to contain at least one attribute of "date" or "date and time" type, by which one can define the date of purchase.

Examples.

Let the operation "purchase" contain the attributes:

- *Goods.*
- *Prize.*

- *Date of purchase.*
- *Etc.*

The example of the interval of the operation's registration – “date of purchase” has to be from the 1st till the 31st of January, 2007 year.

Aggregation block.

In the given block there is a restriction on the operations' quantity or on the amount of value of chosen attribute of client operation in the set time interval.

2 types of aggregation:

- Restriction on the client operations' quantity in the set time interval.
- Restriction on the amount of values of some client operations' attribute in the set time interval.

Examples.

- To receive bonuses on the current operations a client in the period from the 1st till the 31st of January, 2010 year (“date of purchase”) had to make more than 3 purchases1 по 31 января 2010 года (restriction on the client operations' quantity).
- To receive bonuses on the current operations a client in the period from the 1st till 31st of January, 2010 year (“date of purchase”) had to make purchases of total “cost” more than 1000 units (restriction on the amount of values of the attribute “cost”).

Please, pay attention that for creation of aggregation block with restriction on the amount of the attribute's values a client operation has to contain an attribute of numeric type.

Block of restriction.

In the given block the restriction on the value of some client operation's attribute in the set time interval is defined.

Examples.

To receive bonuses on current operations a client in the period from the 1st till the 31st of January, 2010 year (“date of purchase”) had to make the purchases with the attribute's value “goods” which is equal to “TV set” (restriction on the attribute's value “goods”).

Rule of registration of client operations' history has to contain the aggregation block, block of restriction or both blocks simultaneously.

Examples of the joint use of aggregation and restriction blocks.

To create the bonuses on current operation a client in the period from the 1st till the 31st of January, 2010 year (attribute “date of purchase” – time interval) had to make purchases of goods of the category “bakery goods” (restriction on the attribute's value “goods” – block of restriction” of total “cost” more than 1000 units (restriction on the amount of the values of the attribute “cost” – aggregation block).

Creation and revisions.

Creation and revisions of programs and offers are made using the screen form “Business information”/”Programs” (see item [3.2.5](#)).

2.3. Client operations' on-line data.

Definition.

Client operations' on-line data – set of client operations on which bonuses are calculated according to the registered in the system and effective at the moment of calculation loyalty offers.

Each client operation has to contain data according to its operation type of template and identifier of the client who performed an operation.

Client's identifier – additional field which is necessary to define the client operation's belonging. In other words, this field is necessary for the possibility of the addressed bonuses calculation.

Clients are not obligatory to be registered in the system. Bonuses can be calculated for the abstract clients' identifiers entering with client operations' data. In this case, identifier's authentication to clients is the task of a user who receives the calculated bonuses.

Examples.

Let the operation's template "purchase" contain the attributes' set:

- *Date of purchase.*
- *Name of goods.*
- *Prize.*
- *Goods' quantity.*

Example of a record corresponding to the template:

- 04.02.2001 ("Date of purchase").
- Calculator ("Name of goods").
- 100 ("Prize").
- 2 ("Goods' quantity").
- Client's identifier, for instance, ciphered number of a plastic card.

Data packet identifier.

Each set (burst) of client operations transferred into the system has to contain set's identifier – Data packet identifier.

It's intended for solving mistaken situations, which occur while replicated data transferring using files, for instance.

Please, pay attention, that client operations' data changing is not supported in the system.

Data processing order.

- Client operations' data are processed when they are entered into the system, and bonuses calculation on them are made for all valid offers of all active at the moment of calculation programs.
- Client operations are processed in the system according to their structure's description (to client operations' templates).

If the names of operations, attributes or types of attributes do not correspond to the templates – client operations won't be registered in the system.

In the absence of attributes' data, which are in the conditions of offers' rules – client operations won't be included into the bonuses calculations.

Examples.

Let the template of client operation "purchase" contain the attribute "date of purchase" (data type "data"), and offer, on which the we make the calculation, has a condition – "date of purchase" has to be made in July of 2010 year.

- If the client operations' data which entered into the system contain the attribute "date of purchase" which meaning doesn't correspond to the type "data" – client operations won't be registered in the system.
- If the client operations' data which entered into the system don't contain the attribute "date of purchase", the bonuses calculation on entered operations won't be made.

In other words, for successful bonuses calculation the client operations' data have to be fully corresponded to the client operations' templates.

Creation and revisions.

Client operations' data entry into the system is made using the screen forms of the part "Client operations" (see item [3.2.6](#)) or using transfer of data files (see item [3.3](#) и [3.4](#)).

2.4. Bonuses' corrections.

Definition.

Bonuses' corrections – additional bonus points granted to the clients on some loyalty offer. Corrections can be both positive (example – additional bonus for registration in the program) and negative (example – calculations of payments made on bonuses received in frames of the offer).

Examples.

On the registered offer "Bonuses for expensive goods" of the program "Main program" some clients were granted the following bonuses' corrections::

- Mr. Smith (*client*).
- 11/10/2009 (*adjustment's date*).
- +100 (*quantity*).
- Additional prize for registration in the program (comments).

- Mr. Jones (*client*).
- 11/14/2009 (*adjustment's date*).
- -500 (*quantity*).
- The valuable present was given for saved bonus points (comments).

Data packet identifier.

Each set (burst) of bonuses' corrections transferred into the system has to contain set's identifier – Data packet identifier.

It's intended for solving mistaken situations, which occur while replicated data transferring using files, for instance.

Please, pay attention, the changing of the bonuses corrections' data is not supported in the system.

Creation and revisions.

Bonuses' corrections data entry into the system is made using the screen forms of the part "Bonuses' corrections" (see item [3.2.7](#)) or using transfer of data files (see item [3.3](#) and [3.4](#)).

Comments.

Bonuses' corrections data entry into the system has sense only if you plan to permit your clients (participants of loyalty programs) the access to information about bonuses which were calculated for them in frames of created by you loyalty offers using the «**PointLoyalty Manager**».

3. Work with application.

3.1. Categories of input data.

Data entering into the system can be relatively divided by the following features:

- By periodicity of input.
- By data volume.

Data type	Periodicity of extension and changing data	Information volume
Client operations' template, clients' attributes, programs and	Low.	Moderate.

offers.		
Users' categories, information about clients.	Depends on business type.	Potentially large.
On-line data on client operations.	High.	Potentially large.
Data on bonuses update.	Depends on business type.	Potentially large.

As a consequence, in the system the following ways of data input are supported:

Way of data input	Screen forms	Loading data files	Setting FTP access for automatization of the process of data files transfer
Information type			
Client operations' templates.	Yes	No	No
Clients' attribute.	Yes	No	No
Programs and offers.	Yes	No	No
Users' categories	Yes (moderate data volume or testing purposes).	Yes	Yes
Information about clients.	Yes (moderate data volume or testing purposes).	Yes	Yes
On-line data on client operations.	Yes (moderate data volume or testing purposes).	Yes	Yes
Data on bonuses update.	Yes (moderate data volume or testing purposes).	Yes	Yes

3.2. Data input using the screen forms.

3.2.1. Client operations' templates.

Client operations' templates are created in the system using the screen form "Business information"/"Client operations' templates" via filling the tables with data on operations and attributes or via coping ready templates.

Comments.

Please, pay attention while modifying already created client operations' templates. Make sure that templates which you modify are not used in the active loyalty offers, or all offers remained correct after templates' modification. Non-correct loyalty offers won't be used in bonuses calculation.

3.2.2. Clients' attributes.

Clients' attributes are created in the system using the screen form "Business information"/"Clients' attributes" via filling in the table with data on attributes or via coping ready templates.

Comments.

- Please, pay attention modifying already created clients' attributes. Make sure that attributes which you modify are not used in active loyalty offers or that all offers remained correct after attributes' modification. Non-correct loyalty offers won't be used in bonuses calculation.
- After clients' attributes modification it'll be probably required to update client's data in the system.

3.2.3. Clients.

Clients' base is supported in the system by the screen form "Business information"/"Clients" via filling in the table with clients data according to the previously described clients' attributes (see item [3.2.2](#)).

Work with client's data using the screen form is efficient while processing moderate volumes of information or in testing purposes. Having large data volumes, clients information's updating is possible only using file transfer (see item [3.3](#) or [3.4](#)).

3.2.4. Users' categories.

Users' categories are created in the system using the screen form "Business information"/"Users' categories" via filling categories' "tree" and tables of volumes set.

Work with data of users' categories using the screen form is effective while processing the moderate volumes of information or in testing purposes. Having large data volumes, clients information's updating is possible only using file transfer (see item [3.3](#) or [3.4](#)).

Comments.

Please, pay attention while modifying already created users' categories. Make sure that the categories which you modify are not used in active loyalty offers or that all offers remained correct after categories' modifications. Non-correct loyalty offers won't be used in bonuses calculation.

3.2.5. Loyalty programs and offers.

Programs.

Programs are created in the system using the screen form "Programs" via filling in data tables.

Please, pay attention, that you can temporary turn off any active loyalty program, modifying its status on "blocked". All offers of this program will be also turned off.

Activation of before blocked program doesn't mean the automatic activation of loyalty offers.

You can update loyalty programs' fields directly in screen form's table.

Each loyalty program is corresponding to the offers' list. Mouse click on the record which correspond to the offer you are interested in for browsing and updating data.

Please, pay attention that by default only active at the present moment loyalty programs and offers are reflected.

Offers.

Offers are created in the system using the screen form "Programs" via filling in the tables with offers' data.

Each offer has 4 tabs on screen form:

- Base data.
- Operations (see item [2.2.3](#)).
- Clients (see item [2.2.4](#)).
- Historical (see item [2.2.5](#)).

After definition of based characteristics, you have to create at least one rule on pages "Operations", "Clients" or "Historical".

While defining some rules in one offer, all of them should be completed for the successful bonus calculation.

3.2.6. Client operations' data.

Work with client operations' data using the screen form is effective while processing moderate volumes of information or in testing purposes, for instance, for checking created loyalty offers' running. Having large data volumes information transfer on client operations is possible only using files (see item [3.3](#) and [3.4](#)).

Manual data input.

Description.

For manual data input on client operations “Client operations”/”Tabular data input” form is used.

Sequence of actions.

- Chose the type of client operation from the list of registered templates.
- Fill in the table of client operations according to the chosen template. Please, pay attention, that each record “client operation” the additional field - client’s identifier -is put in correspondence.
- Save data on operations in the system and get the calculated bonuses or use the preview of bonuses without operations registering in the system for opportunity of information’s correction.

Data copying from MS Excel documents.

Description.

For support of data transfer from MS Excel documents the form “Client operations”/MS Excel document’s copying” is used.

Such a method of data input can be effective for users who posses the information on client operations in office documents and who have the possibility to prepare the system of data converting in required format.

Sequence of actions.

- Chose the type of client operation from the list of registered templates.
- Fill in the Excel document according to the template of chosen operation. You can get the Excel file template on the screen form. The template contains all necessary comments for filling.
- Copy data on client operations from filled Excel file in entry field of screen form (copy the whole document list, including table’s headlines.
- Check reformed in table data (like in item Manual data input [Ручной ввод данных](#)). If necessary update the information.
- Save data on operations in the system and get the calculated bonuses or use the preview of bonuses without operations registering in the system for opportunity of information’s correction.

3.2.7. Bonuses’ adjustment.

If necessary the data on bonuses’ adjustment can be input into the system.

Wok with data on bonuses’ adjustment using the screen form is effective while processing the moderate volumes of information or in testing purposes. Having large volumes of information the information’s update on bonuses’ adjustment is possible only with files’ transfer (see item [3.3](#) or [3.4](#)).

Comments.

Work with the screen form is possible only in case of choosing the option “Permit the access to clients” of the division “Personal information” (see item [5.1](#))

3.3. Data files’ loading.

Description.

Data files’ loading is applied for entering into the system the large volumes of information of the following types:

- Data on client operations.
- Data on clients.
- Data on user categories.
- Data on bonuses’ adjustment.

Rules of updating data registered before.

- Updating of the registered in the system client operations is not supported. Only entering of new data bursts is available.
- If transferred data contain the information about clients, who are registered in the system before, the information on these clients will be fully updated, including all attributes' values.
- If transferred data contain the information about user categories, registered in the system before, the information on them will be fully updated, including values' sets and subcategories' lists.

Examples.

Supposing the information about client "Mr. Smith" is registered in the system:

- Attribute "education" - student.
- Attribute "Date of birth" - 05.01.1990.

Received file with new data contains other information set about client "Mr. Smith"

- Attribute "education" - graduate.
- Attribute "marital status" - single.

After data file processing resulting information about client Mr. Smith will contain attributes' values "marital status" and "education".

Please, pay attention, that while transferring files with updated data on user categories. Make sure that upgraded categories are not used in active loyalty offers or that all offers remained correct after templates' modification. Non-correct loyalty offers won't be used in bonuses calculation.

Sequence of actions.

- On form "Volume data"/"XML files loading" get DTD for necessary data type.
- Create XML file with data according to the received DTD.
- Load formed data file into the system.
- Chose the type of the resulting file (text or XML).
- Chose the type of getting results (getting results by e-mail or waiting online).
- Press the button "Process".

Comments.

- Work with form provides the restriction on the size of transferred (see item [6.1](#)).
- If necessary, use ZIP compression of XML files.
- If you have complicated offers, which contain rules of registration of client operations' history or rules using the user categories, getting results of file processing is possible only by e-mail.

3.4. Setting of FTP access for automation of data files transfer process.

Description.

FTP system of access to user data is employed for automation of process of entering into the system of large volume information of following types:

- Data on client operations.
- Data on clients.
- Data on user categories.
- Data on bonuses' corrections.

Rules of updating data registered before is similar [3.3](#).

Please, pay attention while transferring files with updated data on user categories. Make sure that updating categories are not involved in active loyalty offers that all offers remained correct after templates' modification. Non-correct loyalty offers won't be used in bonuses calculation.

Work order.

- On form “Data volume”/”Setting form of FTP server” study the description of work principles and list of system restrictions of FTP access.
- Fill in all necessary fields for access to your FTP server.
- Check the correctness of access setting (button “check connection”).

Comments.

- System of data receiving from FTP servers of clients provides the restrictions on transferring files’ size (see item [6.2](#)).
- DTD for creating data files are available for getting on the screen form.

3.5. Integration with external program systems.

Identification of client operations’ templates, client attributes and creating loyalty programs and offers – rather rare procedures, which require the full control of program product’s user. As a result, given functionality is supported in the system only using the screen forms.

After creation of active loyalty programs and offers it’s necessary to transfer into the system on-line data on client operations for their processing and bonuses calculation.

Thus, the necessity of periodical information input into the system appears.

If in your programs you also use rules of clients attributes’ restriction, it can require periodical update of your clients’ information.

You can aromatize the transfer of on-line business data into the system by way of your program products’ integration with “**PointLoyalty Manager**” system.

The standard way of such integration – using the web services technology.

“**PointLoyalty Manager**” is an API set for access into the system of registered users.

WSDL file is available on form “Integration”.

4. Reports.

In the base version of application the following set of standard reports is available:

- Report on bonuses.
- Final report.
- Report on entered data on client operations.

If you want to receive the additional reports or to adopt the existing reports according to your wishes. address the commercial department of the Company sales@pointloyalty.ru.

4.1. Report on bonuses.

Report is meant for output of detailed information on bonuses calculated in the system.

In tabular style the following information is reflected:

- Program’s name.
- Offer’s name.
- Client’s identifier.
- Calculated bonus.
- Record’s number (used while information’s transfer using files for identification of a record which corresponds to the concrete client operation).

- Date of calculation.

While making report the filters' setting is possible in the following fields:

- Program.
- Offer.
- Client operation.
- Client's identifier.
- Calculation period.

Please, pay attention that using the screen form you can delete calculated bonuses from the system.

4.2. Reports on offers.

Report is meant for output of consolidated information on registered in the system loyalty offers.

In tabular style the following information is reflected:

- Program's name.
- Offer's name.
- The number of client operations included in calculation.
- The number of calculated bonuses.
- The percent of client operations included in calculation on which the bonuses were received.
- The number of clients received bonuses.
- The amount of calculated bonuses.
- Potential amount of bonuses (when 100 % of client operations are included in bonuses calculation).

While making report the filters' setting is possible in the following fields:

- Program.
- Offer.
- Calculation period.

Report on entered data on client operations.

Report is meant for output of information on client operations registered in the system.

While information transfer using files, FTP access or web services, blunders can occur in case of false format of given data, in case of attempts of second information transfer etc. The report permits to follow the status of all data bursts successfully registered in the system.

In tabular style the following information is reflected:

- Data packet identifier (see item [2.3](#)).
- Date of information input.
- Status of processing.
- The number of client operations included in the registered data burst.

While making report the filters' setting is possible in the following fields:

- Burst's status.
- Burst's identifier.
- Calculation's period.

Please, pay attention that using the screen form you can delete the data burst together with all client operations from the system. If on given client operations the bonuses were calculated, they will be also deleted.

4.4. Report on bonuses' corrections.

Report is meant for output of information on corrections of bonuses registered in the system.

While information transfer using files, FTP access or web services, blunders can occur in case of false format of given data, in case of attempts of second information transfer etc. The report permits to follow the status of all data bursts successfully registered in the system.

In tabular style the following information is reflected:

- Data packet identifier (see item [2.4](#)).
- Date of information's input.
- Status of processing.
- The number of bonuses corrections, included in the registered data burst.

At making report filters' setting is possible on the following fields:

- Burst's status.
- Burst's identifier.
- Period of data input.

Please, pay attention that using the screen form you can delete from the system the data burst together with all bonuses' corrections.

5. Additional functionality.

5.1. Personal information.

Description.

This information is given by the system's user in the process of registration and could be modified further.

Registration data contain 2 sections:

- General information.
- Administration of client's access.

General information.

General information about system's user.

Please, pay attention on the following restrictions:

- Fields "Surname", "Name", "Login", "Password" and "E-mail address" are obligatory for filling.
- Fields "Login" and "Password" have to contain minimum 4 characters.
- Field "Login" can contain only letters of Latin alphabet, figures and underlining character.

Administration of client's access.

The section contains a number of settings, which define the principles of your clients' access to the information on calculated bonuses in frames of loyalty offers created by you.

- Tick "To permit the access to clients". Chose this option if you want your clients to have an access to the history of their operations and bonuses on our site, using the special application.
- "Type of client's authentication". Choice of way of your clients' authentication in the application of operations and bonuses' history view.
 - By password. It's necessary to transmit into the system the client's identifier and password, by which your client can join your programs. Thus, after registration for joining to your programs in the system client has to indicate the identifier and the password he/she was assigned.
 - By e-mail address. It's necessary to transmit into the system the client's identifier and e-mail address, by which your client will be able to join your programs. Thus, after registration for joining to your programs in the system a client has to indicate only his/her identifier. In this case, the address of e-mail has to coincide with the e-mail address indicated by client while registration on our site.
 - By identifier. It's necessary to transmit into the system only the client's identifier, by which your client will be able to join your programs. Thus, after registration for joining to your programs in the system a client has to indicate only his/her identifier.

Tick “Single identifier”.

- While data transfer on client operations the identifiers of clients who performed the operations enter into the system.

- At signing the agreement on joining the loyalty program, clients are given the identifiers to access the information about operations performed by them and calculated bonuses (see section “Type of client’s authentication”).

Chose the option “Single identifier” for using single identifier for both cases of using.

- Tick “Inform clients”. Chose this option if you want your clients to receive notifications about received bonuses and made corrections via e-mail.
- Tick “Single owner”. Chose this option if you want your clients to join only to your programs. Otherwise, your clients will have the opportunity to join other owners’ programs, using the same registration account in our system.
- “Encryption”. If at sending into the system data on clients operation you transfer clients’ identifiers encrypted – chose the type of using encryption.

Examples.

Suppose the following working scheme:

- Your clients’ identifiers – bank cards’ numbers.
- You transfer into the system data on clients operation using bank cards’ numbers, encrypted according to SHA-256 algorithm, as clients’ identifiers.
- You want your clients to have the access to the information about calculated bonuses using our application.

In this case the following client access administration’s settings are necessary.

- Tick “To permit the access to clients” – chosen.
- “Type of client’s authentication” – by password (using bank cards’ numbers as clients identifiers is meant availability of the most strict approach to authentication).
- Tick “Single identifier” – chosen (after registration in the system your clients to join your programs will be able to indicate their bank cards’ numbers as personal identifiers).
- Tick “Inform clients” – according to your needs.
- Tick “Single owner”- according to your needs.
- “Encryption”- type SHA-256 is chosen.

Please, pay attention that even if your clients use bank cards’ numbers as personal identifiers, we don’t keep this important information in the system, but use the type of unidirectional data encryption indicated by you.

Actions.

To update personal data use the form “Personal information”.

5.2. Recovery of the password to enter the system.

Description.

This functionality is used at loss by user of login or password to enter the system.

Actions.

To receive the registration data use the form “Recovery of registration data (button “Forgot your password” on the form “Login”.

In entry field it’s necessary to input e-mail address indicated at registration and press the button “ Receive data”.

If you forgot which e-mail address you indicated at registration – you can:

- Write to Company support service support@pointloyalty.ru a letter with the detailed description of your problem.
- Register again in the system.

5.3. Status form.

This form of statistic information review is the initial form after user's entry into the system.

On this form the following information is reflected:

- On programs and offers registered in the system.
- On users categories, clients and client operations registered in the system.

The detailed information on calculated bonuses for each program and also on entered into the system data for definite period you can receive on the from "Reports". See item [4](#).

6. Restrictions on base functionality and customization's variants.

Functionality's base set of free version «PointLoyalty Manager» has a number of restrictions.

6.1. Restriction on data files' sizes downloaded using the screen form.

Data type	Free base functionality	Users of professional version	Users of corporative version
On-line data on client operations.	6 KB – ZIP file 1 M - XML file	12 KB – ZIP XML файл 2 M - XML file	12 KB – ZIP file 2 M - XML file
Clients' data.	6 KB – ZIP file 1 M - XML file	12 KB – ZIP XML file 2 M - XML file	12 KB – ZIP file 2 M - XML file
Data on user categories.	6 KB – ZIP file 1 M - XML file	12 KB – ZIP XML file 2 M - XML file	12 KB – ZIP file 2 M - XML file
Data on bonuses' corrections.	6 KB – ZIP file 1 M - XML file	12 KB – ZIP XML file 2 M - XML file	12 KB – ZIP file 2 M - XML file

6.2. Restriction on FTP access system.

6.2.1. Restriction on transferring files' sizes.

Data type	Free base functionality	Users of professional version	Users of corporative version
On-line data on client operations.	35 KB – ZIP file 5.5 M - XML file	130 KB – ZIP file 25 M - XML file	320 KB – ZIP file 60 M - XML file
Clients' data.	35 KB – ZIP file 5.5 M - XML file	130KB – ZIP file 25 M - XML file	320 KB – ZIP file 60 M - XML file
Data on user categories.	35 KB – ZIP file 5.5 M - XML file	60 KB – ZIP file 10 M - XML file	130 KB – ZIP file 25 M - XML file
Data on bonuses' corrections.	35 KB – ZIP file 5.5 M - XML file	130KB – ZIP file 25 M - XML file	320 KB – ZIP file 60 M - XML file

6.2.2. Additional restrictions.

Restriction type	Free base functionality	Users of professional version	Users of corporate version
Possibility of FTP access settings' coordination.		Yes	Yes
Possibility of transferring data' format coordination.		Yes	Yes
Possibility of using the alternative channels of data transfer (FTPS, email etc.).			Yes

6.3. Restriction on number of simultaneously processing offers.

Restriction type	Free base functionality	Users of professional version	Users of corporate version
Maximum number of active loyalty offers processing simultaneously in the system.	5	10	No restriction
Maximum number of rules with usage of user categories simultaneously processing in the system (for all offers).	2	5	No restriction
Maximum number of rules of registration of client operations' history simultaneously processing in the system (for all offers).	2	5	No restriction

6.4. Other restrictions.

6.4.1. Additional functionality.

Restriction type	Free base functionality	Users of professional version	Users of corporate version
Additional reports.		Yes	Yes
Possibility of creating individual rules in loyalty offers.			Yes

6.4.2. Support.

Support type	Free base functionality	Users of professional version	Users of corporate version
Giving the full set of documentation.	Yes	Yes	Yes
Support by email.	Yes	Yes	Yes
Support by phone.			Yes
Response time by request.		2 days	2 hours
Number of supported requests.		5 in month	No restrictions

Support type.		8*5 (M.- Fr.)	24*7
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