



# Product Reference Book

of Echo Loyalty Essential

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# Product Reference Book

Echo Loyalty is an entire loyalty ecosystem tailored to any Client's needs. This comprehensive toolkit allows you to better understand the Customer's behavior and influence it, by building and managing engaging Loyalty programs, creating rich customer experiences and personalized interactions across multiple touchpoints, as well as automate marketing activities.

Loyalty Management, which is one of the platform Components, enables the System user to manage Points, Discounts, Rewards, and Coupons.

The Product Reference Book describes **ECHO LOYALTY**.

## Software Features

### Modular Architecture

Echo Loyalty Essential comprises modules with the selected functionality required for the defined user groups:

- Marketer Panel – an application dedicated to business users; it enables simple and intuitive management of Loyalty program functionalities like promotions and incentives
- Customer Care Panel – an application dedicated to managing loyalty program members; it provides an intuitive interface for viewing loyalty program members' accounts and performing manual actions.

Please note that all the features and capabilities described refer to **Echo Loyalty Essential**.

# Enrollment

## Echo Loyalty Essential - Marketer Panel. Main Business Processes: Enrollment

### Enrollment settings

ECHO Loyalty offers Enrollment to Loyalty programs via the following Channels:

- Shopify
- Customer Care Panel
- API

Tools available in the Marketer Panel allow for the configuration of the Enrollment process based on the supported parameters. They are grouped as follows:

- Member attributes –shows the elements of enrollment and member profile form in Echo Loyalty (read-only mode)
- Member Settings setup that applies to every Enrollment contains:
  - Member consents
  - Enrollment restrictions
  - Program parameters
    - Time zone

Marketer Panel also displays information about some of the system behavior in regards of Enrollment:

- Password policy
- Program parameters:
- Points accumulation period
  - Points expiration period
  - Points booking delay
  - Reward refund period
  - Member language
  - Currency

The system supports only one Enrollment configuration at a time (only one setting is active).

### Member Attributes

The table below contains the configuration of an Attribute assigned to the Member attributes form.

Configuration data	Comment
Attribute name	The name of the attribute.
Value type	The type of attribute value. The following options are possible: <ul style="list-style-type: none"><li>• Number</li><li>• Text</li><li>• Date</li></ul>

	<ul style="list-style-type: none"> <li>Datetime</li> </ul>
<b>Acceptance level</b>	<p>Indicates if Echo Loyalty requires the attribute value during the Enrollment and Member profile modification (single configuration, regardless of the scenario of channel).</p> <p>The following options are possible:</p> <ul style="list-style-type: none"> <li>Mandatory</li> <li>Optional</li> </ul>
<b>Enrollment</b>	<p>Indicates if attribute is available to be set during enrollment. It applies to all channels via which enrollment is possible.</p>
<b>Member profile</b>	<p>The list of channels via which attribute will be available:</p> <ul style="list-style-type: none"> <li>Member profile: Mobile Application &amp; Member Portal (Applicable with B2C API access)</li> <li>Member profile: Customer Care Panel</li> <li>E-commerce/3rd party integration</li> </ul>

Attributes are not editable in the Member attributes form. They are in read-only mode.

The table below presents the configuration for Member:

<b>Attribute</b>	<b>Acceptance level</b>	<b>Enrollment</b>	<b>Member Profile: Mobile Application &amp; Member Portal</b>	<b>Member Profile: Customer Care Panel</b>	<b>E-commerce/3<sup>rd</sup> Party Integration</b>
<b>Identifier Number</b>	Optional	Not included	Included	Included	Included
<b>First Name</b>	Optional	Included	Not included	Included	Included
<b>Last Name</b>	Optional	Included	Not included	Included	Included
<b>Birth date</b>	Mandatory	Included	Not included	Included	Included
<b>Country</b>	Mandatory	Included	Not included	Included	Included
<b>Email</b>	Mandatory	Not included	Not included	Included	Included
<b>Customer status</b>	Mandatory	Included	Included	Included	Included
<b>Personal data processing (available when the Consent is Active)</b>	(determined by consent configuration)	Included	Included	Included	Included

<b>Personal data profiling (available when the Consent is Active)</b>	(determined by consent configuration)	Included	Included	Included	Included
<b>Terms &amp; Conditions (available when the Consent is Active)</b>	(determined by consent configuration)	Included	Included	Included	Included
<b>Loyalty program communication (available when the Consent is Active)</b>	(determined by consent configuration)	Included	Included	Included	Included
<b>Communications by third-party partners (available when the Consent is Active)</b>	(determined by consent configuration)	Included	Included	Included	Included
<b>Marketing Communications (available when the Consent is Active)</b>	(determined by consent configuration)	Included	Included	Included	Included

## Validation During Enrollment

The Attribute values provided in the Enrollment request are validated against:

- Value type
- Format (e.g. for dates)
- Attribute obligatoriness

In the case the validation fails, ECHO LOYALTY rejects the Enrollment request.

## Member Settings Setup - Login and Password

Applicable in case of B2C integration.

The e-mail address provided during enrollment is used by Echo Loyalty system as a login attribute.

Password Policy – specifies the structure of a Password that each Loyalty Program member defines to their Loyalty Account

- Rules – sets of Conditions (or a single Condition) that must be met for the Password to be accepted by the system:
  - the minimum password length,
  - the minimum number of uppercase characters.
  - the minimum number of lowercase characters.



- the minimum number of numbers.
  - the minimum number of special characters.
- Customer password expiration – the Customer’s Password validity period (in months) following which the Member is required to change his/her Password. This parameter is set to '0' - ECHO LOYALTY does NOT control the Customer's Password validity period.
- Reset password process:
  - ECHO LOYALTY hosts a webpage dedicated to the Password reset feature that allows the Member to set a new Password using a uniquely generated token.
  - There is a unique Password reset link assigned opening the Password reset webpage and the token parameter identifies the Member who clicks on the link.
  - ECHO LOYALTY triggers the Customer\_RESET\_PASSWORD Notification and the linkQuery data source contains the whole Password reset link. All Customer notifications utilizing the linkQuery data source propagate the whole usable link within the DS variable.
  - There are two input fields when providing a new Password (i.e. New Password and Confirm New Password) and an identical Password must be provided in both those input fields. Otherwise, such a password is NOT saved and a Message about the Password mismatch is displayed.
  - ECHO LOYALTY validates the newly provided Password against the currently active Password Policy.
  - In the case of a Member updating his/her Password, the New Password CANNOT be the same as their current Password. This validation is NOT performed when setting the Password for the first time. When the Member provides his/her New Password and the Password is successfully validated against the configured Password Policy (outcome: success) and differs from their current password then such a password is saved.

## Member Settings – Identifiers

Each of loyalty members is assigned with system-generated identifier number upon successful enrollment to the loyalty program.

Each member has only one identifier number.

## Identifier Numbers Deduplication

The following Deduplication restrictions apply concerning Identifier Numbers in ECHO LOYALTY:

- when the number has been already assigned to a member in the ECHO LOYALTY system:
  - the number CANNOT be assigned to a member in the ECHO LOYALTY system,
- when the number has NOT been assigned to a member in the ECHO LOYALTY system:
  - the number can be assigned to a member in the ECHO LOYALTY system.

## Identifier Visual Modes

The QRCode Visual Mode is specified for Identifiers.

## Member Settings Setup – Enrollment Restrictions

Enrollment restrictions – ECHO LOYALTY supports the verification of data provided in Enrollment forms before a Member Account is created. the User will be able to determine in which form the Attributes are to be checked

in a specific way. If the value of a given Attribute complies with the provided Restriction Rule, the system will NOT allow for a given Member to be registered. The following Enrollment Restrictions Rules are supported:

Min age of customer – the minimum Age required for a person to be enrolled as a Loyalty Program member. If this parameter is set to 0, ECHO LOYALTY does NOT validate the Age of Loyalty program members. If any natural number is used to define this parameter, ECHO LOYALTY validates the Age of Loyalty program members during Enrollment and Member Profile Modification requests based on their Date of birth.

Blacklisted email addresses domains – Blacklisted Domains for Members' Email addresses that CANNOT be used by Loyalty program members. All Enrollment requests received from the specified Domains are rejected by the system automatically (the Account is NOT created).

## B2B Members Migration Process

- The system supports Bulk migration of Members to the Echo Loyalty system to enable migrating Members from other Loyalty platforms to Echo Loyalty as a dedicated process.
- To enable Member migration in the deployed environments, Bulk upload of Members with partial data is enabled.
- The migration covers the configuration of all Member attributes for Enrollment (except for Password and mandatory Consents).
- The System user can mass import the Members' data in the offline mode according to the Member attributes configuration for Enrollment but without their Passwords and only with optional Consent data (even when individual Consents are configured as mandatory).
  - Consents may be migrated but Migration requests without Consents are NOT rejected.
  - Upon resetting their Login and Password, each migrated Member will accept Consents according to the already implemented processes (only for B2C)
- Echo Loyalty supports the Member migration process via API. The structure and behavior of the API are close to the B2B Members Enrollment API with minor but crucial differences, and essential similarities.
- Similarities:
  - Respects the Member attributes configuration for Enrollment.
  - Does NOT support Member passwords (each Member must reset their Password upon their first login).
  - Deduplication is performed according to the Echo Loyalty rules.
- Differences:
  - Consents can be but do NOT have to be accepted, even if they are mandatory.
  - If the Consents are accepted in the API request, they are always accepted for the newest Consent version.
- The flow of the process is as follows:
  - The system processes a B2B Member migration.
  - The system checks if all the Member's data (except for Consents and Password) are valid and unique according to the Echo Loyalty platform rules and configuration (i.e. if all Member data except for Consents and Password are valid and the Deduplicated data are unique).
  - The system creates a Loyalty account for the Member.
  - The Member requests a Password reset in the Mobile Application/Member Portal and goes through the Password reset procedure. As a result, the Password for the Member is reset. Then, the Member logs in to the Mobile Application.
  - The system checks if all the configured active, mandatory Consents are accepted by the Member in their newest versions. In the case NOT all of the configured, active, mandatory

Consents are accepted in their newest versions by the Member, the system prompts the Member to accept the unaccepted, mandatory Consents, and missing optional Consents. The Member must accept all the missing, mandatory Consents.

- The Member gets access to all Mobile Application features.

The system limits the actions available for migrated Customers who failed to accept all of the configured active, mandatory Consents as follows:

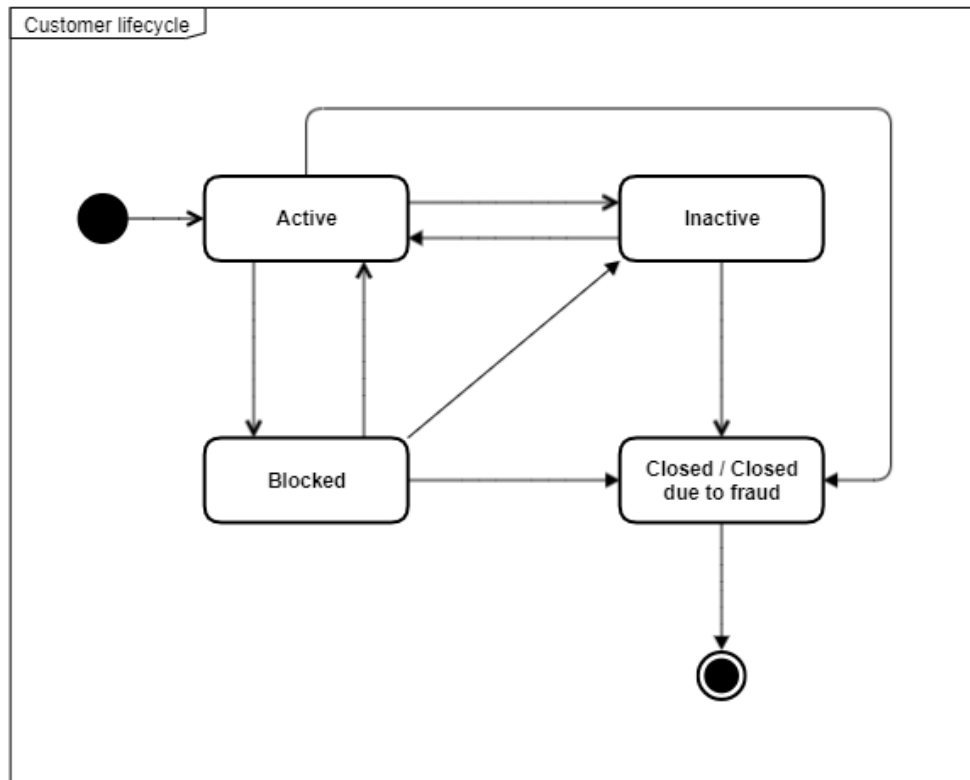
Action		Comment
<b>Login to the Mobile Application/Member Portal</b>	Allowed	
<b>Access to the Mobile Application/Member Portal (apart from consents)</b>	Blocked	Applicable only with B2C API Access
<b>Avatar Add/Modify/Remove</b>	Blocked	
<b>Customer Data Modification</b>	Blocked	
<b>Getting notifications</b>	Blocked	Blocked only when the Member does NOT have the T&C accepted. Other consents do NOT affect this action.
<b>Points Correction</b>	Blocked	
<b>Points issuance</b>	Blocked	
<b>Redemption/Order</b>	Blocked	
<b>Coupon Redemption</b>	Blocked	
<b>Customer birthday</b>	Blocked	
<b>Customer Registration</b>	Blocked	
<b>Any other action</b>	Blocked	

## Member Settings Setup – Inactivity Management

If a given Member is in Status: Inactive, he/she will NOT be able to log in to Mobile Application. Only Members in Status: Active can log in and perform actions in Mobile Application.

Customer Care Agent can:

- change the Member's Status from Inactive to Active.
- perform the following actions in the context of a Member in Status: Inactive
  - Points expiration - indicates that Points for the Member is Status: Inactive shall expire normally according to their Points expiry schedule.
  - Change identifier description - the Customer Care Agent's action (only Customer Care Agents can do that in Customer Care Panel)
  - Change Identifier/Customer/Account status: indicates that the statuses can change within Echo Loyalty processes (e.g., from Active to Inactive).



## Deduplication Mechanism

To prevent creating multiple Loyalty accounts that belong to the same person, ECHO LOYALTY supports a Deduplication mechanism and applies it during each Enrollment/Member Profile Modification request as follows:

- Each generated Identifier is unique across all Identifiers existing in the Loyalty program.
- Each Email provided as part of the Enrollment/Member Profile Modification request must be unique across all Email addresses existing in the Loyalty program (ECHO LOYALTY treats all Email addresses as case insensitive).
- Customers in Statuses: Closed and Closed due to fraud are excluded from the Deduplication mechanism.

When the system receives a valid Enrollment/Member Profile Modification request and the provided Email/Identifier Number is assigned to any other Member, the system returns an error Message informing about the Duplicated data.

## Loyalty Program Parameters

Echo Loyalty supports the following Loyalty program parameters:

- Points accumulation period – the period during which Points are accumulated (accumulating Points stops for Loyalty program members after this Period); ECHO Essential has it set to 0 – means that it does NOT consider the Points Accumulation Period for issued Points.
- Points expiration period – the period of Points Validity (accumulated Points expire after this Period); along with the Points Accumulation Period, this parameter is taken into account when calculating the

Points Expiration Date. ECHO Essential has it configured to 12 months – points expire after 12 months from issuance.

- Points booking default delay – the default period after which Points should be booked for the Transaction in which they were granted (once an appropriate task is launched. ECHO Essential has it set to 0 – points are booked immediately after their issuance.
- Reward refund period – the period used to calculate the time during which the Customer may refund a Reward purchased as part of a Redemption transaction. Transaction cancellation period is calculated based on Transaction date and the value of this parameter. (This parameter does NOT apply to cases of Transactions created automatically by the system, i.e. when receiving a Reward from Benefits.) ECHO Essential has it set to 14 days.
- Member language – Echo essential supports only 1 member language: English.
- Ability to close Member account from Mobile Application – it supports functionality not available in ECHO Essential.

## Privacy Policy (Consents)

The System user can define whether specific Consents need to be captured in the system for individual Customers to successfully finish their Enrollment process for them to participate in the Loyalty program. At first, the System user gets to specify which Consents they want to use – it is user responsibility to configure the consents according to their country/region law. If the User decides to use some Consents, they can specify the following for each Consent: its Type, Status, and Maturity level.

- The following consents may be specified:
  - Agreement for Terms & Conditions
  - Agreement for GDPR consents: Personal data processing
  - Agreement for GDPR consents: Personal data profiling
  - Agreement for Loyalty program communication
  - Agreement for communications by the third-party (partners)
  - Agreement for Marketing communication
  - In the case of communication-related consents, the system supports giving consent for communication through the following Channels:
    - Email
- The system displays the following details for each consent in Marketer Panel (in Enrollment - Member Settings - Member Consents):
  - Name
  - Type
  - Acceptance level – determines whether a given Consent is required during the Enrollment process.
  - System version – the system version of a given Consent.
  - Document version of consent content – enables consent versioning and storing information about every particular Consent Version accepted by the Loyalty program members.
  - Status
- Once all the Consents are properly configured in Marketer Panel (in Enrollment - Member Settings - Member Consents), the Consent Acceptance screen in Web Portal displays the following Consents:
  - Personal Data Processing consent, Personal Data Profiling consent, and T&C consent
    - Only current versions of active Consents are displayed.
    - Mandatory Consents are clearly distinguished from optional Consents.
    - By default, all Consents are in the unaccepted state.

- Communication Permissions and Third-Party Communication Permissions
  - Only active Permissions are displayed.
  - Each Permission lists available Channels configured, which the Member can accept separately in the context of individual Permissions.
  - By default, all Channels are in the unaccepted state.
- When a Customer enrolls via Web Portal, the system verifies whether he/she has accepted the Terms & Conditions of the program. The information (the Terms & Conditions version along with its Acceptance Date) is available in the API used for the Enrollment, marking that a particular Customer has accepted a particular T&C version.
- If the Current Version of the consent document changes (a new Current Version is released), it is possible to indicate the need for the new version to be accepted by all Loyalty program members. the User defines the number of days within which all Loyalty program members must accept the new Current Version to continue their participation.

## Consents Content

The system enables adding a new Consent content, which is then displayed in Web Portal, for the following consents:

- Agreement for Terms & Conditions
- Agreement for GDPR consents: Personal data processing
- Agreement for GDPR consents: Personal data profiling
- The system supports the history of previously uploaded Consent content. When the User uploads a new Consent content, Marketer Panel marks the recently uploaded version as the Current Version and enables downloading the Consent content for each of the existing versions.

ECHO LOYALTY automatically generates a System version for each uploaded/defined Consent content. Below please find the scenarios when the System version of the consent is upgraded:

- Updating a PDF file or editing TXT content for one of the Languages in which the Consent is already defined (incl. system Default language), related or NOT to the format change from TXT to PDF and backwards.
- Uploading a PDF file for an additional Language version or editing the new inline TXT content for an additional (new) Language version.
- Dropping an existing Language version (setting TXT format and empty content).

Consent content can be populated for all Languages configured in the current System version and supports:

- Text format: text area
- PDF-format: file upload

In the case of Communication consents, the system does NOT allow defining the Consent content because it is assumed that all terms for processing communication are described in T&Cs or GDPR consents.

In the case of other Consents, the Consent content is supported and it is also possible to modify it at any time (it is possible to add a new Consent content). The system supports the following options:

- System version – populated from Current Version (read-only).
- Manually added document version – populated from Current Version (editable).

System No version upgrade flag

- The No Version upgrade flag applies to all Consent details, including Language versions and format types of consent contents.
- When the No version upgrade flag is set to true, the system enables modifying the Consent content (i.e. the content of Personal Data Processing, Personal Data Profiling, and Terms & Conditions consents) with no need for Member re-acceptance.
  - If that is the case, the new System version of the consent is NOT stored in the application
  - All of the provided Consent details, including Consent content in any Language versions and/or format types, and including the Document version, are overwritten to the current System version of the consent.
- By default, the No version upgrade flag is set to false which means that each modification of the Consent content must be re-accepted by Loyalty program members within the Consent acceptance period that must be defined.

When Member re-acceptance of the Consent content is required, the system supports defining the following options for the Consent acceptance period (Applicable for Mobile App and Web Portal):

- Exact number of days/weeks/months/years.
- Immediate acceptance required (as if 0 was provided in the Exact number form).

The Consent acceptance period is required and must be configured when:

- The Consent content in any Language is added/modified/removed (except when the No version upgrade flag is set to true).
- Every day, around 00:00:00, ECHO LOYALTY checks if all Members have accepted the latest Current Version of each active Mandatory Consent within the specified Consent acceptance period.
- If at least one Current Version of an active Mandatory Consent has NOT been accepted by a given Member and the configured Effective Date of the Consent acceptance period has passed, the system flags the Member as the one who has NOT accepted active Mandatory Consents.

Below please find the scenarios when the System version of the consent is upgraded:

- Updating a PDF file or editing TXT content for one of the Languages in which the Consent is already defined (incl. system Default language), related or NOT to the format change from TXT to PDF and backwards.
- Uploading a PDF file for an additional Language version or editing the new inline TXT content for an additional (new) Language version.
- Dropping an existing Language version (setting TXT format and empty content).

## Blocking Actions of Members That Did Not Accept Mandatory Consents

The system does NOT allow any actions, except for the necessary ones, to be performed by blocked Members or Members who failed to accept all of the configured active, mandatory Consents before the Consent Acceptance periods of those Contents elapsed.

If that is the case, any such active/inactive/blocked Members are able to login to Mobile Application/Web Portal only to accept the missing (not yet accepted) mandatory Consents.

Once the Acceptance period of an active, mandatory Consent (not accepted by the Member) elapses, available actions in the context of the Member's Loyalty account are limited via all Channels.

The table below shows the list of blocked/allowed actions when the Member fails to accept all of the configured active, mandatory Consent (at least one) within the allotted Acceptance period.

Action	Member status Active	Member status Inactive	Member status Blocked	Comment
<b>Login to Mobile Application/Member Portal</b>	Allowed	Allowed	Allowed	
<b>Access to Mobile Application/Member Portal (apart from consents)</b>	Blocked	Blocked	Blocked	
<b>Avatar Add/Modify/Remove</b>	Blocked	Blocked	Blocked	
<b>Customer Data Modification</b>	Blocked	Blocked	Blocked	
<b>Getting notifications</b>	Blocked	Blocked	Blocked	Blocked only when the member does NOT have the T&C accepted. Other consents do NOT affect this action.
<b>Balance Inquiry</b>	-	-	-	
<b>Points Correction</b>	Blocked	Blocked	Blocked	
<b>Points Expiration</b>	-	-	-	
<b>Point issuance</b>	Blocked	Blocked	Blocked	
<b>Redemption/Order</b>	Blocked	Blocked	Blocked	
<b>Coupon Redemption</b>	Blocked	Blocked	Blocked	
<b>Customer birthday</b>	Blocked	Blocked	Blocked	
<b>Refund (Reject) Redemption</b>	-	-	-	
<b>Reversal</b>	-	-	-	
<b>Return</b>	-	-	-	
<b>Change Identifier description</b>	-	-	-	
<b>Change Identifier/Customer/Account status</b>	-	-	-	
<b>Terminate Account</b>	-	-	-	
<b>Customer Registration</b>	Blocked	Blocked	Blocked	
<b>Any other action</b>	Blocked	Blocked	Blocked	



## Marketing Communications Permission (for API B2B)

When the Marketing Communication Permission is set to: Active (which means it is used in the Loyalty program) and a Customer Care Panel user enrolls a Member, he/she is able to mark the Marketing Communication Permission through selected Channels.

- As a result, the system displays the current state of the Marketing Communication Permission in Customer Care Panel via all supported Channels in the Customers context. It is also possible to modify the Marketing Communication Permission through selected Channels.

When the Marketing Communication Permission is set to Inactive (which means it is NOT used in the Loyalty program) and a Customer Care Panel user modifies a Member profile in Customer Care Panel, then the Marketing Communication attribute is NOT displayed.

The system is updated with any change of the Marketing Communication Permission made by a Member.

- When the Member modifies his/her Marketing Communication Permission (by giving or withdrawing it for any Channel), the system stores the updated Member Consents.

When a Member enrolls in the Loyalty program, he/she is subject to profiling that includes, among others, defining Promotions. Being subject to profiling is NOT determined by individual Consents the Member expresses but by bare becoming a part of the Loyalty program.

For any configuration of the following Consents set up in ECHO LOYALTY: Personal Data Profiling, Personal Data Processing, Terms and Conditions, with regards to the following consent configuration options: Status (Active/Inactive), Acceptance level (Mandatory/Optional), when the Member marks (accepts or declines) the Consents in any possible configuration allowing him/her to be enrolled, he/she is subject to profiling regardless of the individual Consents he/she accepted or declined.

All ECHO LOYALTY Members are subject to profiling.

## Customer Care Panel – Main Business Processes: Member Management

### Member management - Searching for Customers

ECHO LOYALTY enables searching through the base of Loyalty Customers by providing Attributes from each level of the Loyalty Account structure: Account, Customer, and Identifier. Possible options are as follows:

- Basic search by: Email, Identifier number, Last Name.
- Advanced search by:
  - Account details: Registration date from - to, Balance from - to, Account status.
  - Customer details: First Name, Last Name, Birthdate from - to, Email, Status, External Customer ID.
  - Identifier details: Identifier number, Identifier Type Name, First transaction from - to, Last transaction from - to, Identifier status Name.
- Displaying the List of Members with the following details: Account status, First Name, Last Name, Address details, Email address, Identifier number assigned to the Customer, Identifier status.
- Ability to navigate to Member details.

## General Actions and Information - Enrollment

The system enables registering new Members to the Loyalty program by entering their data manually:

- Personal data: First Name, Last Name, Birth date, Email address,
- Member consents
- Address data: Country

Registration forms can be found in the system:

- Basic search by: Registration form creation from - to, Customer.
- Advanced search by: Registration form creation from - to, Customer, Identifier Type Name.

The List of registration forms displays the following details:

- Application date, First Name, Last Name, Identifier number
- Ability to display Registration form details.
- Option to print the List of registration forms.
- Option to export the List of registration forms to a .csv file

## General Actions and Information – Transactions

The system enables searching for Transactions performed by Customers:

- Basic search by: Transaction date from – to, Transaction type name, Transaction status name, Identifier number.
- Advanced search by: Transaction date from – to, Transaction type name, Transaction status name, Identifier number assigned to the Transaction, Transaction ID, Location code and Name, Partner code and Name.

The list of Transactions displays the following details:

- Transaction date, Transaction type, Partner assigned to the Transaction, Identifier number assigned to the Transaction, Transaction Channel, Transaction status, Transaction total value + currency, Transaction Points Balance, Transaction status.
- Ability to display Transaction details.
- Option to print the List of Transactions.
- Option to export the List of Transactions to a .csv file.

## General Actions and Information - Orders

The system enables searching for Reward orders placed by Customers:

- Basic search by: Order date from – to, Order status Name.
- Advanced search by: Order date from – to, Order status Name, Delivery method.

The List of orders displays the following details:

- Order ID, Order date, Total number of redeemed Points, Order status.
- Ability to display Order details.
- Option to print the List of orders.
- Option to export the List of orders to a .csv file.

## Domain Related Actions - Data Domains

In Customer Care Panel, the System user can perform actions on the Loyalty Customers Profiles in the context of each item from the Loyalty Account structure:

- Account,
- Customer,
- and Identifier.

## Domain Related Actions – Account actions

Displaying general data: Account status.

## Domain Related Actions – Customer Actions

Customer

- Displaying:
  - Personal data: First Name, Last Name, Birth date, Email address.
  - Membership data: Customer status.
  - Member consent: Personal data processing consent (Acceptance date and Accepted version), Profiling data consent (Acceptance date and Accepted version), T&Cs acceptance consent, Loyalty program communication indicator (Channels accepted with acceptance date), Communications by third party indicator (Channels accepted with acceptance date), Marketing Communications indicator (Channels accepted with acceptance date).
  - Address data: Country.
- Displays the List of Transactions:
  - Basic search by: Transaction date from – to, Transaction type name, Transaction status name.
  - Advanced search by: Transaction date from – to, Transaction type name, Transaction status name, Transaction ID, Location code and Name, Partner code and Name, Transaction Channel.
  - Displaying the List of Transactions with the following details: Transaction date, Transaction type, Partner code and Name, Transaction Channel, Transaction status, Transaction total value + currency, Transaction Points Balance.
  - Option to print the List of Transactions.
  - Option to export the List of Transactions to a .csv file.
- Displays Transaction details of the selected Transaction:
  - Transaction type, Transaction date, Transaction processing date, Transaction status, Created by, Partner code and Name, Transaction Channel, Identifier number assigned to the Transaction, Points details.
  - Sale: Location code and Name, Cashier ID, Total value + currency, Discounted value, Input Points, Comment + List of products, Coupons.
  - Points Correction: Correction reason
  - Redemption: List of bought Rewards
  - Reversal
  - Redemption Refund
  - Sale Return
  - Points Expiration
- Option to modify Customer details:

- Personal data: First Name, Last Name, Birth date, Email address.
- Member consent: Personal data processing consent, Profiling data consent (Acceptance date and Accepted version), T&Cs acceptance consent, Loyalty program communication indicator (Accepted channels), Communications by third party indicator (Accepted channels), Marketing Communications indicator (Accepted channels).
- Address data: Country.
- Point management
  - Points correction
    - Option to perform the Points correction operation: Plus/Minus, Number of Points, Point type, Expiration Date, Billed partner code and Name, Default reason (Other, Problem with configuration), Comment.
  - Points – Points Balance
    - Basic search by: Point type.
    - Displaying the List of available Points: Points type, Number of Points in Booked status, Expiration Date.
    - Option to print the List of delayed Points.
    - Option to export the List of delayed Points to a .csv file.
  - Points – Expired Points
    - Basic search by: Point type, Expiration Date from – to.
    - Displaying the List of expired Points: Points type, Expiration Date, Number of expired Points.
    - Option to print the List of expired Points.
    - Option to export the List of expired Points to a .csv file.
  - Points – Points expiration forecast
    - Basic search by: Point type, Expiration Date from – to.
    - Displaying the List of expired Points: Points type, Expiration Date, Number of Points to expire
    - Option to print the List of expired Points.
    - Option to export the List of expired Points to a .csv file.
- Incentives – Coupons
  - Basic search by: Coupon number, Coupon type, Coupon status.
  - Advanced search by: Coupon number, Coupon type, Coupon status, Coupon Expiration Date from – to.
  - Displaying the List of issued Coupons: Coupon number, Coupon type, Coupon Expiration Date, Status.
  - Option to print the List of issued Coupons.
  - Option to export the List of issued Coupons to a .csv file.
  - Coupons - Coupon details:
    - Displaying Coupon details of a single Coupon: Coupon number, Usage start date, Coupon Expiration Date, Coupon type, Status, Number of coupon usage (Usage repeatability rule), Used quantity, Reversal count, Promotion which issued the coupon, Link to a transaction which issued the coupon, Discount type (Fixed monetary / Percentage), Discount value.
- Orders - Member order history
  - Basic search by: Order date from - to, Order status Name, Order ID.
  - Advanced search by: Order date from - to, Order status Name, Order ID, Delivery method Name (Online).

- Displaying the List of orders: Order ID, Order date, Total number of redeemed Points, Order status.
- Option to simulate a Refund.
- Option to cancel the Order.
- Option to print the List of orders.
- Option to export the List of orders to a .csv file.
- Member order history details: Order date, Order status, Order Channel, Delivery method, External ID, Comment, Total number of redeemed Points, Order content (Code, Name, Status, Points, Quantity, Total Points).
- Orders - Order Reward on behalf of the Customer
  - Option to make a Redemption.
  - Order details (Order date, Channel, Delivery method, External ID, Comment).
  - Rewards details (Code, Name, Status, Points, Quantity, Total Points).
  - Orders - Order Reward – modification.
  - Option to modify Order details: Order details (External ID, Comment).
- Coupon redemption
  - In the Member Coupons view, initially those Coupons are visible that have NOT expired yet or have NOT been used by the Member yet.
  - When there is an Issued Coupon on the list, it is possible to expand its Coupon details and to burn the Coupon. The system enables burning all remaining usages of the Coupon or specifying the number of usages to burn.
  - In such a case the system requires providing a comment.
- Change the Customers status (including Blocking and closing the Customer)
  - Option to Block/Unblock the Customer.
  - Option to close the Customer – this operation is irreversible.
  - Option to clear Customer data (anonymization) – this operation is irreversible.
  - Option to request a Member Password reset.
  - Option to send an Email confirmation.
  - Option to display the history of Customer data modification

## Domain Related Actions – Identifier Actions

Identifier data displayed:

- Identifier creation date,
- Identifier number,
- Identifier status,
- Identifier Type,
- Redemption enabled,
- Comment.

## Burning Coupons on Behalf of the Members

Customer Care Panel user needs to be able to burn Coupons on behalf of the Members.

- Initially, those Coupons are visible that have NOT expired or have NOT been used by the Member yet. When there is a Coupon in Status: Issued on the list, it is possible to expand its Coupon details view and burn the coupon. If the coupon has:
  - only 1 remaining usage – it is possible to burn the Coupon instantly.

- multiple remaining usages (more than one) – it is possible to burn all remaining Coupon usages instantly, or to specify the number of usages to burn.

When burning a Coupon, the system verifies the data validity, processes a Coupon Redemption transaction and takes the User back to the refreshed Member's Coupons view having the filters state from before the Burn operation maintained.

Coupon Redemption transactions are visible in The Member's Transactions view and contain the Used Coupons section.

- Barcode
- Use quantity – the number of usages burned.
- Status – the status after the usage.
- Coupon type
- Use result
- Expiry date

Coupon Redemption transactions are revertible and only full revert is possible. Upon revert, burned Coupons are reverted to their previous state, including their:

- Status
- Depleted usages
- Coupon expiry date

## Transaction Related Actions – Sale Reversal

The system enables performing a complete Transaction Reversal, so that providing returned products is NOT required. The Transaction Reversal operation is available through Customer Care Panel and system API.

Transaction Reversal is allowed for Sale/Generic Event Transactions in Status: Booked.

A successfully processed Transaction Reversal operation results in the creation of a new Reversal Transaction linked to the original (reversed) Transaction:

- Transaction status is set to: Booked.
- Transaction date is set to: Date from the request.
- Transaction processing date is set to: Date from the request.
- The Transaction deducts all NOT-redeemed and NOT-expired Points from the original Transaction. If some of the Points from the original Transaction have been already redeemed, CLM deducts Points of the same Point type from The Member's Points Balance. If there are NOT enough Points of a particular Point type on The Member's Points Balance to cover the Transaction Reversal, the missing Number of Points is NOT reversed.
- The Transaction is associated with the same Partner who is associated with the original Transaction
- The Total Value of the Transaction is set to the additive inverse of the Total Value of the original Transaction.
- The Transaction reverses Counter values.
- The Transaction cancels Coupons issued by the original Transaction; it affects unused Coupons (Coupons in Status: Issued).
- The Transaction maintains Coupons issued by the original Transaction which have been already used (Coupons in Status: Used).
- The Transaction reverses usages of Coupons used in the original Transaction.

Transaction Reversal is available for Account in Status: Active, Customer in Status: Active, and Identifier in Status: Active or Blocked.

## Transaction Related Actions - Point Balance Adjustment

This functionality enables increasing or decreasing the Number of Points of a given Point type manually on Loyalty accounts.

## Transaction Related Actions - Processing of Point Corrections (+) Transaction in the Context of Points Balance Limit

The Customer Care Panel user can issue Points up to the defined Point balance limit through the Points correction (+) operation so that it is NOT possible to break the Loyalty program rules related to the Maximum number of Points that can be issued to a Member.

Before issuing Points, ECHO LOYALTY must check if the Balance limit is set for the given Point type.

When The Member's Point balance + Number of Points to be Issued by the Points correction operation is greater than the Balance limit, ECHO LOYALTY rejects the request and displays information that the Transaction CANNOT be processed due to the defined Balance limit. The system informs about:

- The Balance limit defined on the Point type involved in the operation.

The Maximum number of Points of a given Point type that can be added to The Member's Point balance to reach the Balance limit.

## Transaction Related Actions – Sale Return

Return requests for Sale transactions are supported by Customer Care Panel.

When Customer Care Panel user selects a Sale Transaction in Status: Booked, then the option to Return the Products from that Transaction is available.

The process runs as follows:

- ECHO LOYALTY receives a request to Return Products from a Sale Transaction.
- ECHO LOYALTY checks if:
  - The request is valid (all Mandatory data provided, all data provided in the correct format), and then searches for a Sale Transaction returning the Products.
  - The Partner of the found Sale Transaction and the Partner Code provided in the request are the same.
  - The Transaction is in Status: Booked.
  - The Total Value is provided in the Return request.
  - The Total Value from the Return request is greater than the Total Value from the Sale Transaction.
  - All Products from the Return request can be returned in the Sale Transaction.
- ECHO LOYALTY processes the Return:
  - Simulates the Sale Transaction with the Total Value calculated in the previous step and all NOT-returned Products.
  - Creates a Return Transaction.

If the Sale Transaction is in Status: Booked, but the Transaction does NOT contain any Products (the Transaction did NOT contain any products initially, or all Products have been already returned), then ECHO LOYALTY enables providing the Total Value for Return or the Return details (Products, Products quantity, Total value).

When the option to Return Products from a Sale Transaction is used, ECHO LOYALTY enables providing an additional comment

## Reward Orders – Order Creation

Customer Care Panel enables the System users to support a Member action of redeeming Loyalty Points for Rewards.

Searching Rewards for Orders helps Customer Care agents to filter out by Reward categories.

## Reward Orders – Points Redemption on Behalf of Member - API Request

The API request contains:

Field	Description	Optional/Mandatory	Comment
<b>partner</b>	Partner code, PARTNERS dictionary. maxLength: 10	mandatory (DEFAULT code for the loyalty)	This field does NOT affect the Redemption process. It only indicates the Partner with which the Redemption is made.  Predefined for Essential package.
<b>location</b>	Location code, LOCATIONS dictionary, maxLength: 10	optional	The Location must belong to the Partner.  Predefined for Essential package.
<b>trnNo</b>	string, maxLength: 100	optional	
<b>comment</b>	string, maxLength: 400	optional	
<b>Rewards[]</b>	array of objects	mandatory (at least 1 item required)	
<b>Rewards.pricePlanCode</b>	string, minLength: 3, maxLength: 26	required	Reward point pricing variant code.



<b>Rewards.quantity</b>	integer, minimum: 1	required	No DEFAULT value.
<b>deliveryMethod</b>	<i>Delivery method code, REWARD_DELIVERY_METHODS dictionary</i>	optional	Online delivery for Essential package.
<b>cashierId</b>	string, maxLength: 100	optional	Cashier identifier in external system.

The operation forces the following Redemption logic:

- The Basket CANNOT be empty.
- Rewards with the MaximumRedemptionsAllowed parameter set and equal to N CANNOT be redeemed M>N times.
- Rewards that are NOT in Status: Active, or the Dates of which are out of bounds for the Redemption date are NOT allowed to be redeemed.
- Rewards with Price plans the Dates of which are out of bounds for the Redemption date are NOT allowed to be redeemed.
- The Price plan of the Rewards used in Redemption must have a Channel matching the Redemption Channel. Otherwise, such Rewards CANNOT be redeemed.
- A Reward CANNOT be redeemed if the Member does NOT have enough Points of the Point type specified in the Price plan used with the Redemption.
- A Reward CANNOT be redeemed with an Inactive Redemption transaction Partner (requestBody top-level Partner field).
- A Reward CANNOT be redeemed with an Inactive Reward partner or Contract period dates of the Reward partner that are out of bounds for the Redemption date.
- A Reward must:
  - be in Status: available.
  - have its Start date <= Redemption date.
  - have its End date empty or >= Redemption date.
- The Price plan of the Reward must:
  - have a Channel matching the Redemption Channel or via any Channel.
  - have its Start date empty or <= Redemption date.
  - have its End date empty or >= Redemption date.
- After the Redemption, the Point balance of each Point type on the Members Account must be >= 0.
- Processing a Redemption operation that breaks the rules will cause such a Redemption to fail and the Order will need to be adjusted.
- Searching Rewards for Orders must help the Customer Care agent to perform #1a by allowing him/her to easily filter:
  - Physical Catalogue Rewards + additional optional filter: Supplier.
  - Online Catalogue Rewards.
  - By: Reward type
  - By: Reward categories.

## Reward Orders – Orders Cancellation

ECHO LOYALTY supports the following Order Statuses:

- Placed (initial) – Order neither exported nor canceled.
- Being processed – Exported (final) – upon Order export.
- Canceled (final) – upon Order cancellation.

Order cancellation is possible only if the Order is exported.

Only complete Order cancellation is possible (no partial Order cancellation possible) and only within the Timespan calculated by adding the value of parameter Reward Refund Period (Marketer Panel/ Enrollment/Program Parameters) to the Order placement date.

The Order cancellation period is calculated as follows:

- Value resulting from parameter Reward Refund Period
- Added to the Order placement date.
- Result of addition shifted back to the end of the previous day.

Once the Order is Canceled, all redeemed Points are returned to The Member's balance with their original Expiry dates.

## Supportive Business Processes

### Loyalty Account Structure – Profile Types Support

Within a Loyalty program, there can be only one Profile type configured. It means that the process of registering Customers for the Loyalty program is identical for all Members. However, the system allows differentiating the rules of program participation for the previously registered Customers.

### Loyalty Identifiers – Identifiers Status

Each Loyalty program customer may hold only one Identifier that uniquely identifies their Loyalty Account for Loyalty operations (i.e. collecting Points, ordering Rewards, etc.).

### Loyalty Identifiers - Loyalty Identifiers Numbering Schema

The Numbering schema of Loyalty Identifiers are autogenerated in ECHO Loyalty:

- EAN13 format standard is used by algorithm for the core number generation.

### Identifiers Restrictions

When the Identifier Number has been already assigned to a Member in the ECHO LOYALTY system:

- the Identifier Number CANNOT be assigned to a Member in the ECHO LOYALTY system.

When the Identifier Number has NOT been assigned to a Member in the ECHO LOYALTY system:

- the Identifier Number can be assigned to a Member in the ECHO LOYALTY system.

## General Setup of Customer Credentials - Customer Passwords (Applicable with B2C API Access)

ECHO LOYALTY supports the following customer Password-related features:

- Configurable Password Policy – e.g. minimum length, character mix, etc.
- Password expiration – after a specified number of months.
- Limited number of password attempts – before the Account gets locked.
- Password – stored in an encrypted format.

## General Setup of Customer Credentials – Login

It is possible to allow Customers to log in to Web Portal by using any of the following Customer attributes as a Login (userName):

- Email

## Customer Data Anonymization

The system enables to anonymize the data of customer in Customer Care Panel.

Anonymization means clearing personal data (overwriting by \*).

# Promotions

## Marketer Panel – Main Business Processes: Promotions Management

### Promotions Concept

As a part of the Promotion definition, the User can define:

- General Promotions – based on the Promoted event:
  - Sale
  - Birthday bonus
  - Enrollment

### General Promotion - Intro

#### SALE

- Regular Promotion – all Promotion Conditions are verified in a single Transaction.

Promotion active if following conditions are met:

- Any purchase is made
- Transaction value
- Coupon
  - Select coupon
  - Special event
  - Joining the program
    - Anniversary
      - Once
        - Value
      - Cyclic
  - Customer's birthday
    - Anniversary
      - Once
        - Value
      - Cyclic
  - First event
    - Anniversary

- Once
  - Value
- Cyclic

### **BIRTHDAY BONUS**

- Regular Promotion

Promotion active if following conditions are met:

- Member birthday

### **ENROLLMENT**

- Regular Promotion

Promotion active if following conditions are met:

- Member enrollment

Moreover, the system supports multiple **Incentives** such as:

- Points
- Coupons

The Promotions configuration contains:

- The possibility to create, modify, or remove Promotions, including the definition of:
- Promotion image – each uploaded Image (except the Main one) must be assigned to one Channel (Web or Mobile Application).
- Handled Conditions (e.g. Transaction Value).
- Handled Incentives (e.g. Points)

## **General Promotion - Promotions Concept – General Settings**

The following Promotion properties are available in the system:

- Code –auto-generated by the system.
- Internal Name and description.
- External name and description – optionally presented to the Program participants via Web Portal.
- Status – selecting one of the following values from the dictionary: Inactive, Active, Archive.
- Start date – setting a date in the calendar; the system does NOT Block the back-dated values (setting the date in the past).
- End date – setting a date in the calendar; the system Blocks any date value preceding the Start date; it is possible to leave the End date field unpopulated. If that is the case, the Promotion lasts without any time limit set.

## General Promotion - Limitations to Conditions Occurrences in the Regular Promotions Conditions List

During Promotion configuration, the following Promoted events may be selected:

- Sale
- Enrollment
- Birthday

During Promotion configuration, based on the Sale Promoted event:

The following Promotion Conditions may be used only one time:

- Any purchase is made
- Transaction Value

## General Promotion - Promoted Event: Sale (Regular Promotion Conditions)

As part of the Promotion Conditions of a regular Promotion, the User should define the Promotion Conditions which the Program participant must meet to receive the Incentive(s) defined in the subsequent step.

- The following Events can be used to trigger a Promotion:
  - Sale transaction
  - Coupon redemption
- Transaction Channel – by default, set to All selected.
- ECHO LOYALTY enables defining the following Promotion Conditions when Promoted event: Sale is selected:
  - Any purchase condition – any Transaction made with its Purchase Transaction Value greater than 0, the Transaction Value > 0; no additional options are available for this Promotion Condition.
  - Coupon condition – a specific Coupon type used in a Purchase Transaction; it is required to use a specified Coupon in the Transaction. When selecting a specific Coupon template from a predefined list, it is specified that it is presented when performing the current Transaction.
  - Transaction Value condition – a Transaction made for a specific amount – it is required to make a Purchase Transaction for a specified amount (the value in the default Currency currently configured in ECHO LOYALTY); it specifies that the Promotion Condition must be met in the current Transaction.

It is also possible to define numerous Promotion Conditions – if the following Block (bracket) is selected, it causes the appearance of a logical operator AND which is used between particular Blocks (brackets). The AND operator is used consistently for each subsequent connection between the Blocks. A list appears in the new Block and the User can select one of the Promotion Conditions as in the Points above.

## General Promotion - Promoted Event: Birthday (Regular Promotion Conditions)

ECHO LOYALTY enables defining Promotions based on Promoted event: Birthday bonus – it is possible to grant Incentives for Members on their birthday based on the following rules:

- When the Birthday bonus Promoted event is selected, Member birthday is the only available Promotion Condition and no additional constraints are defined.

- Multiple Promotions with the Birthday bonus trigger source may be configured in the system but there CANNOT exist more than one such Promotion in Status: Active and Promotion dates overlapping other Member birthday Promotions.
- The Transaction Channel is NOT configurable for Member birthday Promotions.
- The Issuance mode can be set only to Single time for the Transaction.
- It is possible to select the following Incentive types:
  - Coupon
  - Points – only static value where the exact Number of Points of the selected Point type is issued to a Member.

## General Promotion - Birthday Promotion Processing

Once a Promotion with the Birthday bonus Promoted event and the Member birthday Promotion Condition is configured, it is in Status: Active and the system processes the Customer Birthday schedule in the specified Promotion validation period and the Promotion is triggered.

ECHO LOYALTY fetches Members celebrating their birthday on a particular day at a specific time (00:01 AM) and automatically processes the Promotion for selected Members and creates a Customer Birthday Transaction (CB) for each of those Members. The Customer Birthday Transaction stores the following information:

- Transaction date – Current date.
- Processing date – Current date.
- Transaction status: Booked.
- Information about Points issued by Promotions (Number of Points, Point type) – multiple Points of different Points types can be issued.
- Information about Coupons issued by Promotions (Number of Coupons, Coupon type) – multiple Coupons of different Coupon types can be issued.

## General Promotion - Promoted Event: Enrollment (Regular Promotion Conditions)

The system enables defining Promotions with the Enrollment Promoted event to encourage potential Members to join the Loyalty program based on the following rules:

- When the Enrollment Promoted event is selected, no additional constraints are defined for that Promotion Condition.
- The Promotion type is set automatically to regular in the read-only mode.
- The Issuance mode can be set only to Single time for the Transaction.
- It is possible to select the following Incentive types:
  - Coupon
  - Points

## General Promotion - Enrollment Promotion Processing

Once a Promotion with the Enrollment Promoted event and the Joining the program Promotion Condition is configured (in Status: Active), the Promotion is triggered and a Customer Registration Transaction is created for the Member.

It is NOT required to make any purchase to trigger a Promotion with the Enrollment Promoted event. Each Promotion with the Enrollment Promoted event can be triggered only once per Loyalty member.

ECHO LOYALTY automatically processes Promotions with the Enrollment Promoted event when the Enrollment request is processed and:

- the Enrollment date adheres to the Promotion schedule (the Promotion validation period between the Start dates and the End dates inclusive time intervals).

ECHO LOYALTY creates a Customer Registration (CR) Transaction when the Enrollment request is successfully processed. It stores the following information:

- Transaction date – Enrollment date.
- Processing date – the date when the Enrollment request is processed in ECHO LOYALTY.
- information about Points issued by Promotions (Number of Points, Point type)
- information about Coupons issued by Promotions (Number of Coupons, Coupon type)

## General Promotion – Incentives

The Promotion may grant the following Incentives:

- Points – means a possibility of issuing Loyalty Points to the Accounts of Loyalty program participants. The following options are available:
  - fixed number of Points.
    - the User may set the number of Loyalty Points of the specified Point type.
  - Dynamic value of Points – defined value multiplied by Transaction Attributes such as:
    - Transaction Value.
- Coupon – a possibility of issuing a Coupon in the current Transaction as a Promotion output.
  - The Customer may then use such a Coupon during their following Transaction and when the Coupon code is provided to ECHO LOYALTY with a Transaction, then the Customer can be Rewarded with a proper Discount.
- Defining the Discount amount and other Coupon-related rules is disabled. The amount is inherited from the Coupon template (editing unavailable).

## General Promotion - Incentive Issuance frequency

The system enables configuring the mode of issuing Promotion incentives; i.e. how often the Program member can be awarded for fulfilling individual Promotion Condition(s).

ECHO LOYALTY supports the following Issuance mode for Incentives in regular Promotions:

Issuance frequency mode	Promotion conditions	Description
<b>Single time for transaction</b>	Any purchase Transaction value Coupon Special event	ECHO LOYALTY triggers the issuance of Incentives only once for a single Transaction, regardless of the number of times the Condition is met.

## Promotion Management - Blocking Promotion modification depending on Promotion dates

ECHO LOYALTY allows modifying Promotions in such a way so that this action does NOT break the ECHO LOYALTY system, and enables Users to perform reasonable marketing actions.



When the System user edits a Promotion which:

- has NOT started yet – it is possible to edit every aspect of the Promotion.
- has already started – it is NOT possible to modify some aspects of the Promotion as specified below:

Promotion field(s)	currentDate < startDate	currentDate >= startDate
<b>Code</b>	Modification NOT allowed 	Modification NOT allowed 
<b>Status</b>	Modification possible 	Modification possible 
<b>Name(s), Description(s), Image file</b>	Modification possible 	Modification possible 
<b>Start date</b>	Modification possible 	Modification NOT allowed 
<b>End date</b>	Modification possible 	Modification possible 
<b>Conditions</b>	Modification possible 	Modification NOT allowed 
<b>Incentives</b>	Modification possible 	Modification possible 

Promotion dates (DateTime) can be set or modified according to the following rules:

- Promotion creation:
  - Promotion start date (required) CANNOT be earlier than the Promotion creation date.
  - Promotion end date (optional), when set, CANNOT be earlier than the Promotion start date.
- Promotion modification:
  - Promotion start date (required) CANNOT be earlier than the currently configured Promotion start date.
  - Promotion end date (optional), when set, CANNOT be earlier than:
    - when the Promotion start date is changed – the new Promotion start date.
    - when the Promotion start date is NOT changed – the current Promotion start date.

## Regular Promotion Processing – Transaction Processing

Once a Promotion in Status: Active is configured in the system:

- when the system processes a Sale Transaction that fulfills the Condition(s) specified in the Promotion, the Transaction triggers processing the Promotion.

## Regular Promotion Processing – Validation for Basket Items with Same Product Code and Different Value/discounted Value per Product's Unit

ECHO LOYALTY does NOT process a Transaction request, in which two or more of the Basket items have the same Product code but different Value per Unit/Discounted value per Unit.

The system rejects such requests and responds with error when a Sale transaction processing request is received with a Basket of Products and two or more Basket items have the same Product code but are provided with different Value per Unit (Value/Quantity) / Discounted value per Unit (DiscountedValue/Quantity) via:

- API B2B
- API B2C extension

## Regular Promotion Processing – Original Product Value Flag in Promotions

The system supports an Original Products Value flag during Promotion definition. The table below presents the system behavior once the flag is set to true:

Original Products Value / Condition	No Basket items or Total Value	Only Total Value is known	Basket items are known	Both Total Value and Basket items are known
Set to false (default) / Transaction Value	0.00	Total Value	The sum of Products Value and Products discounted value	Total Value
Set to true / Transaction Value	0.00	Total Value	The sum of Products Value	Total Value
Set to true or false / Products (Products do NOT have the Original Products Value flag)	0.00	0.00 (Empty Basket)	Products Value	Products Value

The Original Products Value flag is available only for the Transaction Value condition.

Transaction Value checks the Condition based on what is provided in POS (e.g. if there are 2 Promotions with Condition: Transaction Value > 100, Basket value = 101 and both of them give Discount = 30, both will grant the Discount).

The Original Products Value flag in the Transaction Value condition checks the Transaction Value based on the POS Product discounted value.

A Discount for the ticket is assigned based on the Product discounted value (if NOT provided based on the Product Value) unless the Total Value is provided.

The Transactions Total Value is saved according to the following priority: Total value > Product discounted value > Product value.

If the Total Value is provided, then trn\_incentive\_value = Total value.

- The value of restricted Products is NOT saved in the Incentive value.

## Supporting Processes

### Currency – Default Currency

Default currency is USD. It cannot be change for Essential package

### Sale Issuance – Deduplication Criteria

ECHO LOYALTY applies the Deduplication process when processing Issuance Transactions and rejects duplicated Transactions based on the Transaction ID (Transaction identifier). However, the Deduplication check is NOT applied if ECHO LOYALTY does NOT receive a unique Transaction ID (Transaction identifier). Therefore, processing the same Transaction more than once is allowed.

## Incentives

### Marketer Panel – Main Business Processes: Coupons

#### Coupons – Three Modes of Coupon Generation

The process of defining Coupons is carried out in three scenarios determined by their Distribution mode:

- Defining Coupons to be issued in Promotions – unique Coupon numbers are generated by ECHO LOYALTY for Members who participate in Promotions.
- Defining Coupons used in Reward catalog (as Rewards obtainable in the Redemption process) – unique Coupon numbers are generated by ECHO LOYALTY for Members who redeem Points for Coupons.
- Defining Coupons used in Mass Campaigns (without the Member having to meet a specific Condition) – a common Coupon number is distributed to all Members participating in a given Mass Campaign.

ECHO LOYALTY autogenerates the coupon numbers.

ECHO LOYALTY provides direct access to the process of Defining a new Promotion or Defining a new Reward respectively from the Coupon type definition view, assuming that those objects inherit values from specific fields from the Coupon template.

#### Coupons – Coupons Issuance in Mass Campaigns

In ECHO LOYALTY, it is possible to issue Coupons to Customers in Mass Campaigns in which Program participants have at their disposal a single Coupon with its usage rules identical for each Program participant

- In the case of Mass Campaigns, an identical, alphanumeric Coupon number is valid for all Coupons within a campaign.

## Coupons – Coupons Issuance in Rewarding

In ECHO LOYALTY, it is possible to issue Coupons to Customers in Rewards catalog under which Coupons are available in the Redemption process as an exchange for the Loyalty Points collected by Program participants.

- In the case of Coupons that are then used in Defining new Rewards – unique Coupon numbers are generated and then accepted by the system, based on the assumptions that only the Coupon owner can use it.

## Coupons – Coupons Issuance in Promotions

In ECHO LOYALTY, it is possible to issue Coupons to Customers in Promotions where Coupons are obtained by individual Program participants only if they meet the Promotion Condition defined in a given Promotion.

- In the case of Coupons that are then used in Defining new Promotions – unique Coupon numbers are generated and then accepted by the system, based on the assumptions that only the Coupon owner can use it.

## Coupon Configuration – Coupon Definition

In ECHO LOYALTY, the following options can be specified in the Coupon type configuration:

- Incentive: Discount (fixed or dynamic value / Apply to: Whole ticket)
- Issuance period – defines the time when the Coupon can be issued.
- Validity period – defines the time when the Coupon can be used.
- Marketing message text – defines the Content of the Marketing message.
- Coupon provision Channel – determines how Coupons are delivered to Program participants.

## Coupon Configuration – General Information

General information contains the following fields:

- Code – auto-generated by the system.
- Internal name and description.
- Status – selecting one of the following values from the dictionary: Active, Inactive. By default, it is set to Inactive; in the final step of the process, the system displays a Message about the need to activate the Campaign.
- External name and description – optionally presented to the Program participants via Web Portal Application.

## Coupon Configuration – Coupon Validity Period

There are multiple ways of defining the Coupon validity period:

- Exact period – the Coupon will be valid for a specified period.
  - The End date is NOT mandatory but it CANNOT be set earlier than the Start date while the Start date CANNOT be set earlier than the Start date of the Campaign/Issuing Promotion.
  - If the Coupon validity period is specified as an exact From - To period, then regardless of when the Member gets the Coupon, it needs to be both Issued and Used within the defined Timeframe. The End date value may be left blank which means there is no Expiration Date defined for that Coupon.

- No time limit – the Coupon will be valid without any time limit.
- Specific period after Coupons issuance – the Coupon will be valid for N days/weeks/months/years (active only for option: Only a Member who received the coupon). If the Coupon is issued to a Member based on this definition, its Issuance date is known only once the issuance occurs.

## Coupon Configuration – Incentive

Incentives are the real Benefit for Members brought by the Coupons they receive in the Loyalty program. In the case of Mass Campaigns, the Incentives apply equally to all possible Loyalty program partners.

Discount – a monetary or a percentage value of the Discount applied within the Transaction in which the Coupon is used. This value can be applied during the Coupon issuance process by a Promotion or a monetary/percentage Coupon value and can be calculated directly within the Rule.

## Coupon Configuration – Usage Repeatability Rule

Usage repeatability rule – determines how many times a received Coupon can be used by the Loyalty Program member.

- Quantity – valid for a defined number of times, then the Coupon is invalidated with status: Used.
- Unlimited – valid without any time limit.

Coupon usage is verified in the context of the person presenting (using) the Coupon – hence, regardless of whether the Coupon is used by Any member or Only Member who received coupon, the Usage repeatability rule is counted in the context of individual Members and NOT globally.

## Coupon Configuration – Coupon Provision Channels

Coupons are delivered to the Loyalty program participants via Coupon provision Channels:

- For Distribution mode: Promotion – it is possible to select one or more of the following Coupon provision Channels: POS, Email.
- For Distribution mode: Reward – it is possible to select one or more of the following Coupon provision Channels: POS, Email.
- For Distribution mode: Mass Campaign – there is only one available provision channel: POS.

The following Coupon provision Channels are supported:

- POS – the Coupon will be delivered to the Loyalty member(s) within the Campaign dates provided the Program participants perform a Transaction processed by the Point-of-sale system; the Coupon will be printed on their receipts. The system supports a POS Message which returns the Marketing text alongside the result of the Barcode or the QR code function.
- Email – Loyalty members will receive an email message containing the Coupon after the configured Sent date. The content of the email is based on the message template

The System users can specify the way of providing Coupons to Members: Send through all selected Channels (default) or Send through the first selected Channel.

- Send through all selected Channels – enables sending the Coupons through all the selected Coupon provision Channels at once. The Coupons may be sent simultaneously via all Coupon provision Channels to the selected Loyalty program participants, except for those who have NOT agreed to be contacted via particular Coupon provision Channels.

- Send through the first selected Channel – enables specifying the order in which the system will try to deliver communication to individual Loyalty member. If the contact via the highest priority Coupon provision Channel is NOT possible for a given Participant (e.g. for Email – the Participants consent to email communication is missing), the communication will be triggered successively via the next Coupon provision Channel on the list, until it is delivered (via the first accessible Coupon provision Channel for that particular Loyalty member).

Coupon provision related message

- The system provides the Marketer Panel user predefined e-mail message template configured in ECHO LOYALTY to send a Message including a Coupon to Customers when a Coupon is generated.

## Coupon Management – Coupon Statuses and Use Results Supported

The system supports the following Coupon Statuses:

Status	Description
<b>Expired</b>	When the Coupon Expiration Date is passed.
<b>Issued</b>	When a Coupon is Issued to a Customer – Coupon in this Coupon status can be burned in a Transaction.
<b>Used</b>	When there are no charges left on the Coupon – its Coupon status is changed to Used and the Coupon CANNOT be burned anymore.
<b>Canceled</b>	When the Transaction that Issued the Coupon to a Customer is reversed.

The system supports the following Coupon use results:

Use Result	Description
<b>Not applicable</b>	When a Coupon type is valid (available for the Customer) but there is no Promotion that actually burns that Coupon.
<b>Used</b>	When a Coupon type is valid (available for the Customer) and there is a Promotion that burns that Coupon. Regardless of whether the Coupon can be used: 1 time, N times, or Unlimited – its Coupon use result will be Used.
<b>Canceled</b>	When a Coupon was Issued to a Customer by a Transaction (transactionId=X) and this Transaction is reversed in the current Transaction.
<b>Invalid</b>	When a Customer tries to burn a Coupon that is NOT available for that Customer. Example: use of a couponTypeCode of a Coupon that must be Issued to the Customer but is NOT / OR use of a couponNumber of a Coupon that was Used by another Customer / OR use of a totally random number that is NOT recognized by the system.

If the system encounters a problem when processing any of the Coupons provided in the Coupon use (WC) transaction, such a transaction is rejected with error. No Coupon use transaction can be processed successfully if any Coupon cannot be processed in the quantity provided in the request, regardless of the reason.

## Coupon Management – Coupon Burning Promotions Configuration

Once a Mass Campaign Coupon type configuration is finished, ECHO LOYALTY automatically creates a Promotion which enables burning Coupons distributed within a Mass Campaign. The Promotion is created when the Marketer Panel user saves the configuration of a Coupon type for Distribution mode: Mass Campaign.

Once a Promotion/Reward Coupon type configuration is finished, it is possible to navigate to the configuration of the Promotion which burns the Coupons of a given Coupon type directly from the Coupon creation success page.

The system uses the following logic on Promotion definition:

Promotion attribute	Coupon type definition – POS distribution Channel	Coupon type definition –Email distribution Channel
<b>Start date and time</b>	<p>Coupon validity start date</p> <p>Exact period start date – if the Coupon validity period is set to Exact period.</p> <p>Issuance start date – if the Coupon validity period is set to Specific period after issuance or No time limit.</p>	<p>Coupon validity start date</p> <p>Exact period start date – if the Coupon validity period is set to Exact period.</p> <p>Send date – if the Coupon validity period is set to Specific period after issuance or No time limit.</p>
<b>End date and time</b>	<p>Coupon validity end date</p> <p>Exact period end date – if the Coupon validity period is set to Exact period and the End date is specified.</p> <p>Empty – if the Coupon validity period is set to Exact period and the End date is NOT specified.</p> <p>Coupon validity end date – calculated as Issuance start date + Coupon validity period (if the Coupon validity period is set to Specific period after issuance).</p> <p>Empty – if the Coupon validity period is set to No time limit.</p>	<p>Coupon validity end date</p> <p>Exact period end date – if the Coupon validity period is set to Exact period and the End date is specified.</p> <p>Empty – if the Coupon validity period is set to Exact period and the End date is NOT specified.</p> <p>Coupon validity end date – calculated as Send date + Coupon validity period (if the Coupon validity period is set to Specific period after issuance).</p> <p>Empty – if the Coupon validity period is set to No time limit.</p>

If an active Promotion with a Coupon condition is configured in the system (including Promotions visible in Marketer Panel and Promotions automatically created by ECHO LOYALTY):

- when more than one Coupon of the same Coupon type is used in a Sale Transaction, the system grants the Discount defined in the Coupon type as many times as the Number of Coupons in the Sale Transaction request. (Applicable via API access)
- when the Coupon type specifies that a Coupon can be used more than 1 time by a single Member, and the Coupon of a single Coupon type is used in a Sale Transaction, but the Number of the coupon usages in the request is greater than 1, the system grants the Discount defined in the Coupon type as

many times as the Number of coupon usages in the Sale Transaction request. (Applicable via API access)

The system calculates the Number of discounts from Coupon granting depending on the Number of Coupons or the Number of coupon usages in a Sale Transaction using the following logic (Applicable via API access)

Coupon used in sale transaction	Number of usages in transaction	Discount calculation
<b>1 Coupon of a single Coupon type</b>	1	Discount granted 1 time
<b>2 or more Coupons of a single Coupon type</b>	1 for each Coupon	Discount granted 1 time from each Coupon
<b>1 Coupon of a single Coupon type</b>	2	Discount granted 2 times
<b>2 or more Coupons of a single Coupon type</b>	Coupon 1 – Number of usages: 2 Coupon 2 – Number of usages: 1	Discount granted 2 times – from Coupon 1 Discount granted 1 time – from Coupon 2

## Coupon Management – Coupon Usage

The system allows to use Promotion-based and Reward-based Coupons issued to Loyalty program members  
Only the Member who received a coupon

The system enables defining the Coupon validation period as follows:

Distribution mode	Could be used by	Coupon validation period option	Start usage date	Expiration Date & time
<b>Promotion/Reward</b>	Only the Member who received a coupon	Exact period	Start date	End date 23:59 / No Expiration Date & time
	Only the Member who received a coupon	Specific period after Coupon issuance	Issuance date	Issuance date + Specific period 23:59
	Only the Member who received a coupon	No time limit	Issuance date	No Expiration Date & time
<b>Mass Campaign</b>	Any member	Exact period	Start date	End date 23:59 / No Expiration Date & time
	Any member	Specific period after Coupon issuance	Start date	End date 23:59 / No Expiration Date & time
	Any member	No time limit	Issuance date	Issuance date + Specific period 23:59

In the cases above, the system creates a coupon Redemption transaction for the Coupon owner due to the successful processing of the Burning coupon request.



## Marketer Panel – Main Business Processes: Rewards

### Rewards – General information assumptions

By default, the system supports regular Catalog Rewards which can be awarded utilizing the Points redemption.

The Essential ECHO Loyalty supports the following options under Rewards:

- Type: Coupons
- Category: Coupon rewards.

### Rewards – Reward Types

The system allows configuring all the Rewards related to the Points redemption process:

- Create, modify, or remove all the Rewards supported by ECHO LOYALTY.
- Define the Point pricing variants for Rewards.
- Present a List of Rewards.

### Rewards – General information

Rewards are described by:

- Code – auto-generated by the system.
- Internal Name and description
- External name and description – it is optionally presented to the Program participants via Mobile Application. (For Web Portal it's applicable via API access)
- Status: Available/Not available
- Start date – the system Blocks the option of setting back-dated values (setting the date in the past).
- End date

### Rewards – Point Pricing Variants

Point pricing variants make it possible to determine the Number of Points and Point type a given Reward is available in. The Point pricing variant defines:

- When
- for what number of Points
- for what Point type a given Reward is available.

Each Reward may have one or several Point pricing variants defined as a fixed' Price in Points. Each Reward may be redeemed only for a fixed Number of Points.

During the configuration, the User defines:

- Number of Points and Point type
- Start date – this date CANNOT be set to an earlier date than the Rewards Start date.
- End date – this date CANNOT be set to a later date than the Rewards End date.

It is NOT possible to define another Price plan for an identical Point type at the same time within a given Reward; at the validation stage, the system verifies whether there is no conflict in Validity dates of the previously defined Price plans.

## Rewards – Target Group

The Target Group defines the Loyalty program members for whom a particular Reward is available.

In the Essential ECHO Loyalty, there is no possibility to configure this setting. It is in read-only mode.

## Rewards – Rewards Catalog

The Rewards catalog is accessible in alphabetical order and can incorporate Reward listing and searching functionalities at the POS.

Images can also be attached to individual Reward definitions and displayed in the Rewards catalog.

ECHO LOYALTY provides an API the third-party systems can use to get the complete Rewards catalog (Rewards and Reward categories) to duplicate it on their side and allow ordering Rewards from third-party websites. (Applicable via API access)

## Rewards – Rewards Categories

Essential ECHO Loyalty supports only one category: Coupon Rewards.

## Rewards – Delivery options

Delivery presents the following information:

- Partner – the reward issuance for the member will be associated with the presented partner.

## Rewards – Maximum Redemptions Allowed

In Essential ECHO package, this option is in read-only mode.

- Maximum Redemptions Allowed – an Order for a specific Reward may be placed a specified number of times.

## Supporting Processes

### Points Redemption for Reward – Redemption process logic

The following Redemption logic applies:

- Basket:
  - Basket CANNOT be empty.
  - Basket structure conforms to one of the following rules:
    - Basket structure for Online Order: contains any of the Coupon Rewards. The Delivery method is NOT stored in the system.
- Rewards:
  - When a Reward is marked with the maximumRedemptionsAllowed flag and the Maximum number (N) is exceeded, the Redemption is NOT allowed.
  - Redemption is possible only for Rewards in Status: Available and within the configured Reward availability dates.

- Rewards with configured Point pricing variants with dates that are about of bounds for the Redemption date are NOT allowed to be redeemed.
- The Reward must:
  - be in Status: Available
  - have its Start date earlier or equal to the Redemption date.
  - have its End date empty, later, or equal to the Redemption date.
- The Point pricing variant of the Reward must:
  - be configured to Any Channel
  - have its Start date earlier or equal to the Redemption date.
  - have its End date empty, later, or equal to the Redemption date.
- Points Balance:
  - After a successful Redemption, the Points Balance of each Point type on The Member's Account must be higher or equal to 0. No negative Points Balance allowed.
  - The Reward CANNOT be redeemed if the Member does NOT have enough Points of the Point type specified in the Point pricing variant used with that Redemption.

## Points Redemption for Reward – Customer's Eligibility for Redemption

The decision whether individual Loyalty Customers are eligible for 'Redemption is made based on their Account and Customer item Statuses.

## Points Redemption for Reward – Canceling Redemptions

All Redemption types created in ECHO LOYALTY can be later canceled. However, only Orders in Status: Placed or Exported can be canceled and only complete Cancellation is possible (no partial Cancellation possible). The Cancellation is possible within the Timespan calculated by adding the value of the Reward refund period parameter to the Order placement date.

When the date passes, no Cancellation is possible. Once the Order is Canceled, all redeemed Points are returned to The Member's Points Balance with their original Expiry dates.

ECHO LOYALTY creates a separate Redemption cancellation transaction returning Points, the Expiration Date of which is calculated according to the Expiration Date determination rules.

# Reporting

## Marketer Panel – Supporting Processes

### Dashboard

Given that Marketer Panel user-requested dashboard page, the system displays the following statistics:

- the number of Transactions performed on the Current date
- the number of Transactions performed in the Current month
- the number of Transactions performed in Previous months
- the number of Transactions of Sale type performed on the Current date
- the number of Transactions of Sale type performed in the Current month
- the number of Transactions of Sale type performed in Previous months
- the number of Transactions of Redemption type performed on the Current date
- the number of Transactions of Redemption type performed in the Current month
- the number of Transactions of Redemption type performed in Previous months
- the number of Transactions of Points corrections type performed on the Current date
- the number of Transactions of Points corrections type performed in the Current month
- the number of Transactions of Points corrections type performed in Previous months
- the number of Transactions of Return type performed on the Current date
- the number of Transactions of Return type performed in the Current month
- the number of Transactions of Return type performed in Previous months
- the number of Transactions of Refund type performed on the Current date
- the number of Transactions of Refund type performed in the Current month
- the number of Transactions of Refund type performed in Previous months
- the number of new Enrolments performed on the Current date
- the total number of Members in Active status
- the total number of Members in Blocked status

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- the total number of Members in Inactive status
- the total number of Members in Blocked status
- the total number of Members in Inactive status
- the total number of Members in Closed status
- the total number of Members in Closed due to fraud status
- the number of active Promotions at the current moment
- the number of Points issued by any Promotion on the Current date

## Program Parameters

Functionality	Description
<b>Program currency</b>	USD
<b>Program language</b>	English
<b>Point type</b>	<p>Name: Reward Points</p> <p>Description: Points earned through the loyalty program that can be redeemed for rewards.</p> <p>Expiration period: 12 months from points issuance</p>
<b>User</b>	<p>The single user created for both Marketer Panel and Customer Panel has the following data as provided upon purchase:</p> <ul style="list-style-type: none"> <li>• First name,</li> <li>• Last name,</li> <li>• E-mail address (used also as login)</li> </ul> <p>Link to set user password is sent to the provided e-mail.</p> <p>The system supports the Users' Password policies based on the following attributes:</p> <ul style="list-style-type: none"> <li>• Maximum password length</li> <li>• Minimum number of lowercase letters</li> <li>• Minimum number of uppercase letters</li> <li>• Minimum number of digits</li> <li>• Minimum number of special characters</li> </ul>

 echo