



Smart Button Loyalty Platform: New Release Highlights Year-to-Date

February 2016

This release included several additions and enhancements, including improvements to the platform stability and performance. To see all release notes, please visit <https://wiki.smartbutton.com/default.asp?W45>.

GLOBAL EXPANSION

Currency and language enhancement highlights:

- Ability to modify the setting for *currency type display* (The currency follows the regional browser setting, so if the regional setting is USA, the default currency is the US dollar).
- Additional French language translations were implemented into the clienteling (Customer Service) area of the system.
- On-demand and campaign messaging functionality now supports languages that require characters beyond extended ASCII (Chinese, etc.)

Along with current data centers in Australia, Canada and the United States, a new data center location has also been added in mainland China, providing customers in that region of the world with increased performance and the ability to meet local privacy and security requirements.

PROMOTION

A new promotion type called “Transaction Product Quantity Bonus Promotion” is now available in the Transactional area of the Promotions menu. This promotion type was added due to a significant increase in clients’ deployment of these types of promotions, across multiple industries – as a result, it was clear that this addition would be welcome.

The promotion allows for real-time bonusing (points or rewards) on transactions that a specific quantity of a relevant product(s) is purchased. These can also be awarded on an escalated scale.

Example scenarios

Airline: If the customer purchases two flights, they will receive 100 points. If four flights are purchased, then 250 points are awarded.

Retailer: If a customer purchases two pairs of pants, they receive a reward for free alterations.

If three boxes of cereal are purchased, then the customer receives a coupon for a free box of cereal during their next visit.

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MEMBER RANKING/TIERING

The Member Ranking Set (Tiering) functionality was also enhanced. A member ranking set is a tiered or “level-based” grouping of members. They are grouped based on designated rules that may include club assignment, qualifier settings, or optional member descriptors. Member ranking sets can be designated as targets for promotions and can also be used for data export purposes.

- There is now a secondary ranking that allows two different sets of criteria to be configured for qualification
- Date filters have been moved from the tier level to the master ranking set level (Supporting secondary)
- Tier/level entry date is now stored internally
- There is a new supported date filter called "Days From Now"
- A member can be forced into a tier/level by being assigned to one of two descriptors (Secondary override descriptor)
- The ranking sets/tiers can be locked to ensure configurations are not accidentally altered

WEB SERVICES

A number of updated or new web services to assist in easing integration from external systems to Smart Button were added:

- `FetchMemberLanguagePreference` - Returns a single member's preferred communication language information
- `MemberExistsInMemberDescriptor` - Used to determine if a member is assigned to a particular member descriptor
- `FetchMemberInteractionsForDateRange` - Returns a single member's interaction history for a date range
- `FetchMemberPointsToAutoExpire` - Used to determine the expected amount of points that a specific member is due to have expired at the next automatic point expiration execution
- `FetchChoiceRewardWithLanguages` - Returns extended information about a specific choice reward type
- `KeyCodePromotion` - Key code promotion support (location/points earned)
- `SetMemberDescriptor` and `SetMemberDescriptors` – These calls can now be used to remove expiring member descriptor assignments



April 2016

PROMOTION

Product Item Promotion – Allows for non-unique Stock Keeping Units (SKUs) to be included in feeds for the system. Although this sounds counterintuitive, many clients cannot create/print unique product item IDs. This new promotion type allows the ability to issue points on products when eligible codes are received.

As an example of the range for a promotion of this type, please see some of the elements that can apply:

- **Transaction Type:** The type of transaction that will be issued to eligible members who participate.
- **Point Formula:** The amount of points that will accompany the transaction issued to participating members.
- **Active Date Range:** The date range in which entries will be valid.
- **Valid to Product Groups:** The product item group(s) which contain eligible products for the promotion.
- **Entry Limit:** When enabled, enforces a per-member entry limit for the promotion.
- **Eligible Members:** Specifies the segments of members eligible.

SYNCS

“Syncs” is the term assigned to any and all external synchronization processes between Smart Button and other systems. This is one way that clients retrieve data from the system, which then can be used for any purpose. In this release, Syncs have been enhanced for compression, encryption, and performance.

The build and send processes were decoupled and configuration allows for prioritization of files to be scheduled. Automatic retry was also implemented.

HEAD OF HOUSEHOLD

Head of household is heavily used in the global market and specifically in industries like airlines. Accounts earning continued, shows dependents and completed hierarchy. Additionally, related data can be sent externally for analysis.

WEB SERVICES

This release also included a number of updated or new web services to assist in easing integration from external systems to Smart Button.

- **Web Services:** JSON and CORS technologies now supported in WS calls.
- **Web Services:** New Member WS call, [FetchMemberCustomFields](#) returns member custom field data.



- Web Services: New MemberActivity WS call, [FetchMemberTransactionsForDateRangeExt](#) returns extended information about a member's transaction activity within a date range.
- Web Services: New Transaction WS call, [IssueTransactionMultipleProductBasketWithCustomFields](#) can issue a transaction using a multiple product basket type with transaction custom field data.

June 2016

SEGMENTATION

This release features a number of enhancements to the platform's segmentation capabilities. Smart Button's segmentation model and capabilities are among its most uniquely differentiating aspects. Segmentation lets you select and store a subset of items you define. Members are a common item to segment, but clients can also apply segmentation to products, rewards, coupons, transactions, interactions and many other items. Segmentation can take on characteristics of reporting, where action can also be taken. Smart Button can also export data segments. Among other things, segmentation is critical to driving promotions, offers, communications, and content management.

Key characteristics of segmentation in Smart Button

- Segmentation groups are collections of one or more segmentation rules that describe an individual segment
- Rules can be combined using comparison operators, such as AND, OR, >, <, and = .
- The segmentation rules are specific to the item that is being segmented (e.g. member or product item)
- Hundreds of different possible segmentation rules may be designed for members

Segmentation enhancements

- New criteria type, Non-Promo Points Earned, which excludes bonus points and promotional transaction types.
- New export for member groups, "Points To Expire as of Date Older than X Days" allows for projection of points to be expired.
- New export for member ranking sets, "Transaction Totals for Date Range" that allows for export of transactional information for the selected ranking set.
- New export for member ranking sets, "Member Transaction Totals" that allows for export of member-specific transactional information for the selected ranking set.
- New member group rule, ""Has Not Received Choice Reward of ANY Type for Date Range"" that allows for segmentation of members who have not received any choice reward in a date range.



- New member group rule, "Member Custom Field (Multi Checkbox)", allows for segmentation of members based on a member custom field multi-checkbox value.
- New member group rule, "Program Net Points Earned for Date range", allows for segmentation of members who have earned a specified net point amount within a date range.
- New member group rule, "Program Points Expiring older than X Days As of Date", allows for segmentation of members with a projected amount of aged points.
- New member group rule, "Program Points Expiring on Next Auto Expiration Date", allows for segmentation of members with a projected amount of points due to expire on the next auto-execution cycle.
- New member group rule, "Retail Spend for Product Descriptor for Date Range", allows for segmentation of members who have purchased a specified retail amount of product(s) assigned to a product descriptor.
- New member group rules, "Did Not Receive Transaction from Key Code Promotion" and "Did Not Receive Transaction from Product Code Promotion" allows for segmentation of members who have not participated in specific code promotions.

WEB SERVICES

This release also includes a number of updated or new web services to assist in integrating external systems with Smart Button.

- Web Services - New Case WS call, CreateMemberCase, that allows for creation of new member cases.
- Web Services - New Member WS call, SaveMemberCustomFields, that allows for storage of member custom field data.
- Web Services - New Promotion WS call, InternetInstantWinnerPromotionWithRewardInfo, that registers a "chance" for an internet instant winner promotion(s) and returns reward-based information when relevant.



July 2016

EXTERNAL REFERENCES

A key feature with this release was extending External References to the system-defined ID Types (Email addresses and phone numbers). This allows for the data to be more easily identified when imported or exported from Smart Button.

What is an external reference?

An external reference is an identifier for a system object. This identifier, or code, can be used to refer to a system object, when using web services, file imports, and other methods of sending data to Smart Button from an external source. For example, assigning descriptors to locations using a Location Descriptor File requires the locations to have external references. It is considered "best practice" to always set external references for items.

An example external reference for a location named "Smith's Restaurant" might be, SMRST.

Additional Highlights

Clienteling: Clienteling is the customer service portion of the platform. The ability to send a welcome message after manually enrolling members was added. This allows any special or client service enrolments a way to send email/packet info as if it was a regular registration/enrolment.

Messaging Security: SSH2 authentication is now supported for external campaign FTP transfers.

Offers: Internal Rewards (<https://wiki.smartbutton.com/default.asp?W207>) can now be configured to expire at the end of the week/month/year of issuance. This allows for huge flexibility and options in program design.

System: An optimization was made for Recency-Frequency-Monetary calculations (RFM) to increase these calculations' clarity and performance.

WEB SERVICES

This release also includes a number of updated or new web services to ease integration of external systems with Smart Button.

- Web Services - New member call, FetchMemberPropertyCustomFields to fetch member properties and associated property custom field information for a single member
- Web Services - New member call, SaveMemberPropertyCustomFields to create/update a single member property and associated property custom field information for a single member.



For more information or questions please visit us at wiki.smartbutton.com or email us at support@smartbutton.com.

September 2016

ALP SaaS – Reminder

There is a new release, or an updated version of the software released on a cycle of roughly every 6-8 weeks. Sometimes, depending on features or the time of year, etc. the release cycle will vary slightly. Because of this, the release dates are written and programmed to as they may vary slightly each time. Every new release date is communicated to the client and the release notes are published publicly on the [wiki](#).

Segmentation

Again, this release features a number of enhancements to the platform's segmentation capabilities as requested by clients. Among other things, segmentation is critical to driving promotions, offers, communications, and content management.

Enhancements:

- The grouping functionality for members was optimized for increased performance.
- There are four new exports for member groups:
 - "Group Members Interaction Totals" that allows for export of member interaction activity.
 - "Group Members Redeemed Reward of Type Totals" that allows for export of members redeemed reward totals grouped by reward type.
 - "Head Of Household and Dependents" that allows for export of member head of household information.
 - "Points Earned Activity for Date Range Using Activity Timestamp" that allows for export of earned points within a date range.
- There are four new member group rules:
 - "Number of Reward Redeemed of Type (By Redeem Date)", that allows for segmentation of members with a specified amount of redeemed rewards of a specific reward type.
 - "Program Points Expiring older than (inclusive) X Days", that allows for segmentation of members who potentially have aged points due to expire before the end of the specified date range.
 - "Received X Interactions of Type", that allows for segmentation of members with a specified amount of interactions of a specified type.



- "Received Transaction with Location Custom Field", that allows for segmentation of members with transactions associated to specified location custom field data.
- Additionally there is a new transaction group rule, "Transactions With Products Assigned to Product Descriptor", that allows for segmentation of transactions with desired product(s) in their basket(s).

Syncs

"Syncs" is the term assigned to any and all external synchronization processes between ALP – SaaS and other systems. This is one way that clients retrieve data from the system, which then can be used for any of their purposes and existing systems. In this ALP - SaaS release, Syncs have been enhanced for compression, encryption, and performance.

The build and send processes were decoupled and configuration allows for prioritization of files to be scheduled. Automatic retry was also implemented.

Web Services

This release also includes a number of updated or new web services to ease integration of external systems with ALP – SaaS.

- A new member activity web service "**FetchMember360ForSourceDateRange**" is used to retrieve a 360-view (offers, transactions, expirations) for a single member within a date range.
- A new member activity web service "**FetchMemberPointBalancesForSourceDateRange**" can be used to retrieve point balances for a single member within a date range.
- A new transaction web service, "**FetchTransactionBonusPointDetails**" can be used to retrieve transaction bonus point details for a specific transaction.

For more information or questions please visit us at wiki.smartbutton.com or email us at customer-loyalty.na@aimia.com.

November, 2016

Clienteling

The term clienteling is used within the ALP-SaaS application to describe the area of the product that deals with customer service activities. All of the typical features and functionality that you would expect in order to manage your members/customers reside within this area.



Enhancements include:

- Within the Head of Household management page, the display logs for the Head of Household and Dependent now show at all times.
- In clienteling, a customer service agent or administrator will be able to view the members ranking set movement
- "Member 360 View" that provides a printable version of the 360 view page.
- New data exports, "Member Daily Activity Summary" and "Member Reward Summary" for use in Clienteling Services on a single member account have been added.

General Platform

- Member Count – The member count has been added to the member eligibility tree throughout the application. It now dynamically updates upon selecting or de-selecting associated checkboxes within the application to show the actual number of members based on the criteria.
- Member Portal – Additional messaging support added to Product Item and Key Code Promotion module types to provide greater detail when module is no longer accessible due to exceeded limit or non-eligibility.
- Promotions – Batch Reward and Random Reward Promotions will be checked prior to execution to ensure that in the event that one-time use reward codes are being used, enough are available to complete the batch.
- Recurring Transaction Promotion – This type issues points or rewards to members based on achieving intervals of retail spend or points earned within a date range.

Segmentation

Segmentation is critical to loyalty program technology in several ways, including driving promotions, offers, communications, and content management. You can find out more information here: <https://wiki.smartbutton.com/default.asp?W198>.

New segmentation rules criteria:

- Has Not Received Transaction of Type at Location for Date Range
- Has Redeemed Recurring Reward of Type (By Redeem Date)
- Number of Rewards Expired of Type (By Expire Date)



- Program Points Expired for Date Range
- Program Points Used for Date Range

There is a new transaction group export available called "Transaction Product Details", that allows for exporting product details for the selected group of transactions.

For more information or questions please visit us at wiki.smartbutton.com or email us at customer-loyalty.na@aimia.com.

February 2017

ALP-SaaS System Notifications

You can now receive system notifications in your inbox! These notifications are what appear on the ALP-SaaS home page that relay information about upcoming releases or maintenance efforts. If you aren't in the tool frequently, this feature allows you to be aware of what's happening with the platform.

You can go to [SYSTEM > NOTIFICATIONS](#) and then add your email or create an email group to receive the notifications via email. The Notify Event Name is, "[System Announcement Event] Announcement Notification".

Retro Claim functionality is now available to allow members to submit claims for retro transactions, unassociated to an actual member account.

Additionally, there are Web Service calls, Clienteling Services features, on-demand messaging and portal module types available to support this new functionality.

Additional Enhancements

- *Member Portal* - Facebook integration has been updated to utilize the most Facebook API.
- *Point Expiration* - Batch point expirations can now be automated to run on a scheduled basis by the user.
- *Promotions* – A page export has been added to the Promotions Dashboard page. This provides additional details about the active promotions running on the platform.

Segmentation



Segmentation is critical to loyalty program technology in several ways, including driving promotions, offers, communications, and content management. You can find out more information here: <https://wiki.smartbutton.com/default.asp?W198>.

A few of the new segmentation rules criteria:

- Segment - New member segment group rule available, "Has Not Received Transaction of Type at Location Descriptor for Date Range".
- Segment - New member segment group rule available, "Number of Children".
- Segment - New member segment group rule available, "Total Parimutuel Wagered By Device Type".
- Segment - New reward segment group rule available, "Has Not Received Any Reward of Type in a Date Range".
- Segment - Standard Transaction Group export now supports exporting of transaction custom field data.

WEB SERVICES

A number of updated or new web services to assist in easing integration from external systems to ALP-SaaS were added:

- Web Services - Existing Member Call, [EnrollMemberWithCard](#), now supports conversion of a placeholder to a member account when supplied the placeholder's Account Id.
- Web Services - New Case call, [FetchFeedbackTypes](#), used to retrieve the case feedback types configured within the database.
- Web Services - New Case call, [SendPublicCaseNotification](#), used to Email a public entry for a single case.
- Web Services - New Member call, [FetchHeadOfHouseholdDependentsExtended](#), used to fetch information for a member's dependents.
- Web Services - New Member call, [FetchMemberChildInfo](#), for retrieving basic information about a single member's children.
- Web Services - New Member call, [FetchMemberHeadOfHouseholdStatusExtended](#), used to fetch a member's head of household status.
- Web Services - New Member call, [UpdateMemberDescriptorExpireDate](#), for updating the expiration date for an already assigned expiring member descriptor.
- Web Services - New MemberActivity calls, [FetchMemberHistoryPrefLanguage](#) and [FetchMemberHistoryPrefLanguageForDateRange](#), used to retrieve member activity history with transaction type and reward names in the member preferred language.



- Web Services - New MemberReferrer call, [FetchMemberReferrerInfo](#), for retrieving referrer details for a single member.
- Web Services - New Offer call, [IssueMultipleChoiceRewards](#), used to issue one or more rewards of a single reward type to a single member.
- Web Services - New Offer call, [SaveMemberRewardCustomFields](#), used to save data for one or more member reward custom fields for a single reward.
- Web Services - New Promotion call, [ProductItemPromotion](#), for registering Product Item Promotion entries from external sources.
- Web Services - New Transaction call, [FetchTransactionCustomFields](#), for retrieving transaction custom field information for a single transaction.
- Web Services - New Transaction call, [IssueTransactionMultipleProductBasketCustomFieldsBookingDate](#), for issuing transactions with transaction custom fields, booking date and product-level details.
- Web Services - New Transaction call, [IssueTransactionNoBasketWithCustomFields](#), for issuing transactions with custom fields, but without product-level details.

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