

Oracle Loyalty Cloud

Integrating Loyalty with Oracle Responsys Marketing Platform Cloud Service

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Preface

This preface introduces information sources that can help you use the application.

Using Oracle Applications

Using Applications Help

Use help icons  to access help in the application. If you don't see any help icons on your page, click your user image or name in the global header and select **Show Help Icons**. Not all pages have help icons. You can also access [Oracle Applications Help](#).

 **Watch:** This video tutorial shows you how to find help and use help features.

You can also read [Using Applications Help](#).

Additional Resources

- **Community:** Use [Oracle Cloud Customer Connect](#) to get information from experts at Oracle, the partner community, and other users.
- **Guides and Videos:** Go to the [Oracle Help Center](#) to find guides and videos.
- **Training:** Take courses on Oracle Cloud from [Oracle University](#).

Conventions

The following table explains the text conventions used in this guide.

Convention	Meaning
boldface	Boldface type indicates user interface elements, navigation paths, or values you enter or select.
<code>monospace</code>	Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.
>	Greater than symbol separates elements in a navigation path.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program website](#).

Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.

Contacting Oracle

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit [My Oracle Support](#) or visit [Accessible Oracle Support](#) if you are hearing impaired.

Comments and Suggestions

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1 About This Guide

Audience and Scope

This guide is intended for anyone who is involved in integrating Oracle Loyalty Cloud with Oracle Responsys Marketing Platform Cloud Service.

You must perform the integration steps in this guide to integrate Oracle Loyalty Cloud with Oracle Responsys Marketing Platform Cloud Service.

If you want to set up and work with the additional features of Oracle Loyalty Cloud, see the Oracle Loyalty Cloud documentation on Oracle Help Center at <https://docs.oracle.com>.

 **Note:** Throughout this guide, `program_name` represents the name of the Oracle Loyalty Cloud program that you are integrating with Oracle Responsys Marketing Platform Cloud Service.

Related Guides

The following table lists related guides which provide more information about tasks you might have to perform on the products covered by this integration.

Title of Guide	Guide Description
Oracle Loyalty Cloud Administering Loyalty	Describes how to set up and maintain loyalty programs, in which customers enroll in order to earn rewards, and loyalty promotions, which determine the rewards that members get for purchases, for referring other members, and for other behavior.
Oracle Loyalty Cloud Implementing Loyalty	Describes how to create, review, and define specific elements of loyalty programs for enrolled members and their respective transactions, and how to access all loyalty applications with full read writer permissions.
REST API for Oracle Loyalty Cloud	Describes the public REST APIs provided by Oracle Loyalty Cloud that are used to access data in Loyalty Cloud and construct integrations with other systems.
Administering Oracle Integration Cloud	Describes how to create, activate, and monitor integrations and processes on Oracle Integration Cloud.
Using Integrations in Oracle Integration Cloud	Describes how to create, activate, and monitor integrations and processes on Oracle Integration Cloud.
Oracle Responsys Getting Started Guide	Describes how to manage Oracle Responsys Marketing Platform Cloud Service subscriptions.

In addition to these guides, see the online help available with Oracle Responsys Marketing Platform Cloud Service for information on how to use various tools such as Program Designer or Email Message Designer that you use during the integration.

Integrating Oracle Loyalty Cloud with Oracle Responsys Marketing Platform Cloud Service: Overview

As of the Release 13 (update 17D), Oracle Loyalty Cloud supports integration with Oracle Responsys Marketing Platform Cloud Service using Oracle Integration Cloud.

This document outlines the implementation and configuration steps that are required to integrate Oracle Responsys Marketing Platform Cloud Service with Oracle Loyalty Cloud. The integration is designed to support customers who want to take advantage of the latest capabilities of Oracle Responsys Marketing Platform Cloud Service, and leverage their existing investment in Oracle Loyalty Cloud.

Features

The prebuilt integration propagates program and member information from Oracle Loyalty Cloud to Oracle Marketing Cloud asynchronously but nearly in real time. For example, the following member attributes can be propagated:

- First name
- Last name
- Address
- Email address
- Mobile phone number

 **Note:** The attributes for this example can be changed by users by changing the integration mapping within Oracle Integration Cloud.

The integration is built on Oracle Integration Cloud. Asynchronous data transfer ensures no performance degradation. Oracle Integration Cloud has automatic retry capabilities, fault tolerance, and robust recovery to minimize IT involvement.

Limitations

Custom objects in Oracle Loyalty Cloud are not supported by the integration.

2 Configuring Oracle Loyalty Cloud

Preface

This chapter describes the tasks required for configuring the rewards program for Oracle Loyalty Cloud. For information on setting up your Oracle Loyalty Cloud program, see the Oracle Loyalty Cloud Administering Loyalty Guide.

About Oracle Loyalty Cloud Setup

A loyalty program is created by the loyalty manager. It creates a record and enters general information about the program.

After defining the loyalty program, add business partners who participate in this program. Later, when transactions are created that use the program, you can choose the business for the transaction from partners you added here.

When you set up a loyalty program, you must define the point types available for the program, whether there are multiple types or just one. You can also define point subtypes. While creating a new program, the loyalty manager defines tier classes and tiers for the program.

Define program-level attributes to use for creating promotion rules. Attributes you create at the program level are available for all promotions for the program. (You can also create attributes that are promotion-specific when creating a promotion.) Before you can modify a Loyalty Program, you must deactivate it. Changes in the program become available to users after you reactivate the program.

For details on setting up Oracle Loyalty Cloud, see the Oracle Loyalty Cloud Administering Loyalty Guide.

About an Oracle Loyalty Cloud Rewards Program

A loyalty rewards program allows you to define and implement one or more loyalty programs, or reward strategies. It typically includes point types, tiers, attributes, products, accrual and redemption rules, and promotions.

For the purpose of this integration document, assume the loyalty rewards program you are integrating with Oracle Responsys Marketing Platform Cloud Service includes the following parameters:

- Primary (first use) bonus
- Free upgrade
- Tier bonus
- Redemption
- Qualifying Rewards
- Points for money spent
- Enrollment bonus

Setting Up the Oracle Loyalty Cloud Rewards Program

Set up your loyalty program as described in the following procedure. For additional details on setting up an Oracle Loyalty Cloud rewards program, see the Oracle Loyalty Cloud Administering Loyalty Guide.

To set up the Oracle Loyalty Cloud rewards program:

1. Create the products by navigating to the Sales and Products screen.
2. Click the Create Product button, and complete the necessary fields.
3. Repeat the previous step to create all the products you want.
4. Assign the root Product Group so that it can be used by Oracle Loyalty Cloud and assign its usage to Oracle Loyalty Cloud.
5. Navigate to Manage Product Group Usage and associate the redemption products that you created with the product group that you want to use to hold redemption products.
6. Navigate to Manage Product Groups and select the root product group, and then click Lock.
7. Click the Products tab and add new records to the list products list and select the redemption products that you created, and then click Save.
8. Click the Publish button to allow Oracle Loyalty Cloud to use the updated product group and associate the products created earlier with a loyalty program as redemption products.
9. Navigate to the loyalty programs screen, and click the program you want, and then click the Redemption Products icon.
10. In the Redemption Products screen, click Add to add a new record, select the redemption product in the Product field, and complete the other necessary fields.

This product is available to select here because it is in the root product group, which is associated with the loyalty usage.

About Oracle Loyalty Cloud Promotions

Loyalty promotions consist of rewards and redemptions. The reward promotions give members opportunities to earn points that they can exchange for products or services or to earn other rewards. For example, the promotion might allow the members to earn extra frequent-flyer miles or free nights at a hotel.

The redemption promotions are activated when members redeem points for rewards. They reduce the member's point total and provide the member with some reward.

The promotion record includes general information about the promotion, such as its name and when it is in effect. Program-level attributes are defined for a program and are available to all promotions in that program.

Promotion specific attributes are used in only one promotion. They represent fields of the promotion bucket. The promotion bucket is an intersection of the member and promotion records, and it has additional fields that are used for attributes to store values specific to the promotion.

A rule for a loyalty promotion has one or more criteria and one or more actions attached to it. The criteria determine whether the rule qualifies, and the action specifies what the rule does. The criterion of a rule is a conditional statement that Oracle Loyalty Cloud evaluates as true or false. You control whether a promotion is applied to transactions by activating or deactivating the promotion.

For example, your Loyalty program might be set up using the following parameters:

- Enrollment Bonus: 100 Points
- Accruals:
 - 1 point for each dollar spent on a hotel stay; double points if booking first class.
 - Tier bonus on a hotel stay:
 - Premiere: 50% bonus on dollars spent
 - Knight: 100% bonus on dollars spent
 - 0.5 point for each dollar spent on any other product
- Redemptions:
 - A one night stay, for 1000 points
 - Dinner for two, for 500 points
 - Hotel upgrade, for 300 points
- Partners: Easy Pay credit card
- One free upgrade voucher after 3 stays
- First night stay bonus: 50 bonus points
- Tiers (based on qualifying nights):
 - Elite: base tier
 - Premiere: 10 Nights in 1 year
 - Knight: 30 Nights in 1 year

For details on configuring Oracle Loyalty Cloud promotions, see the Oracle Loyalty Cloud Administering Loyalty Guide.

3 Configuring Oracle Responsys Marketing Platform Cloud Service

Preface

This chapter describes the configuration procedures for Oracle Responsys Marketing Platform Cloud Service. For details on configuring Oracle Responsys Marketing Cloud Platform Service, see the online help included with Oracle Responsys Marketing Cloud Platform Service.

 **Note:** You must have a subscription to Oracle Responsys Marketing Platform Cloud Service to use it.

Creating the Profile List Table

For the integration with Oracle Loyalty Cloud, you must create a profile list and add the necessary fields to it on Oracle Responsys Marketing Platform Cloud Service.

To create the profile list table:

1. In Oracle Responsys Marketing Platform Cloud Service, click the Springboard icon, then select Folders.
2. On the Folders page, click New Folder.
3. Enter Oracle_Loyalty_Cloud for the folder name, then click Create.
4. Create a list:
 - a. Click the Springboard icon, then select Data - Manage Lists.
 - b. On the Manage Lists page, click Create New List.
 - c. Enter LoyaltyCloud_MemberList for the list name.
 - d. Select the Oracle_Loyalty_Cloud folder, then click Save.
A message indicates that the list was created successfully.
 - e. Click Change Schema.
 - f. Scroll down to the end of the Change Schema window, then click Add new field for each of the following fields:

Field Name	Field Type
FIRST_NAME	Medium Text Field (to 100 chars)
LAST_NAME	Medium Text Field (to 100 chars)


 **Note:** Other field names, such as EMAIL_ADDRESS_ or MOBILE_NUMBER_ are available by default on Oracle Responsys Marketing Platform Cloud Service and are reused for the integration. Default fields are designated with the trailing underscore character (_).

- g.** When finished adding fields, scroll up to the beginning of the Change Schema window, then click Save.

A warning is displayed.

- h.** Click OK.
- i.** Click Done, then close the window.

The list can now be used for the integration between Oracle Loyalty Cloud and Oracle Responsys Marketing Platform Cloud Service.

 **Note:** If you change the name of either the folder or the list, you will also have to update the integration flows in Oracle Integration Cloud.

Creating the Profile Extension Tables

Profile extensions are where you can place additional member data, such as a member's preferences. Add two profile extension tables, for example, `Loyalty_Member` for the member fields, and `Loyalty_Voucher` for voucher fields to configure Oracle Responsys Marketing Platform Cloud Service for the integration with Oracle Loyalty Cloud.

To create the profile extension tables:


- 1.** In Oracle Responsys Marketing Platform Cloud Service, click the Springboard icon, then select Data - Manage Lists.
- 2.** On the Manage Lists page, select the list you want to edit from the Change List menu.
- 3.** On the list's page, click the Profile Extensions tab.
- 4.** Click Create Profile Extension.
- 5.** In the Create Profile Extension window, click Specify Fields.
- 6.** In the Create Table window, enter the field names and data types for the following fields, then click Next.

Field Name	Field Type
MEMBERSHIP_ID	Text Field (to 25 chars)
TIER	Text Field (to 25 chars)
AVAILABLE_POINTS	Number Field
NIGHTS	Number Field
LAST_ACCRUAL_DATE	Time Stamp (date + time)

- 7.** In the Create Data Source window, complete the following steps:
 - a.** Select a folder to hold the new data source from the menu.
 - b.** Enter a name for the data source, for example, `Loyalty_Member`.
 - c.** Click Create.
 - d.** After the data source is created, close the window.
- 8.** Create a `Loyalty_Voucher` profile extension table for the voucher fields by repeating the previous steps but using the following fields:

Field Name	Field Type
VOUCHER_ID	Text Field (to 25 chars)
VOUCHER_TYPE	Text Field (to 25 chars)
VOUCHER_EXPIRY	Time Stamp (date + time)
VOUCHER_AMOUNT	Number Field
VOUCHER_ PERCENTAGE	Number Field
VOUCHER_ STARTDATE	Time Stamp (date + time)

The profile extension is listed on the Profile Extensions tab for the list. The list can now be used for the integration between Oracle Loyalty Cloud and Oracle Responsys Marketing Platform Cloud Service.

 **Note:** If you change the name of either the folder or the list, you will also have to update the integration flows in Oracle Integration Cloud.

Setting Up Custom Event Types

A custom event is a signal from an external source that alerts Oracle Responsys Marketing Platform Cloud Service when notable customer activity occurs and should be recorded, or alternately when a notable activity occurs to a customer. Since custom events are time-based, they can occur multiple times for a customer with a recorded time stamp for each occurrence.

To set up custom event types:

1. Click on the side navigation bar.
The Account Management page opens.
2. In the Global Settings section, click Define Custom Event Types.
The Define Custom Event Types page opens.
3. Click Add New Type.
A blank row is added at the end of the event list.
4. Enter custom event type name and a description. For example, enter the following custom event types:

Custom Event Type Name	Description
program_ name_ Member_ Enrollment	Enrollment into the loyalty program
program_ name_ Member_Update	Update to a member in the loyalty program
program_ name_ Voucher_Issue	Voucher issued to a member in the loyalty program

Custom Event Type Name	Description
------------------------	-------------

- Optionally, select the Include Mobile APP Channel RIIIDs check box.

 **Note:** Available only if App Channel is enabled for your account.

This option gives you the ability to market to known users on all their devices. For more information, see About Custom Events with App Channel List.

- Click Save.

Other event triggers for which you can create events are:

- Membership card create or update
If a new member gets enrolled into program, changes tiers, requests a new card, or a new card is created or updated, then Oracle Responsys would send a communication for the event to the member.
Entity: membership number and card number
- Member referral
If an existing member refers a new member to a program, then Oracle Responsys would send a communication for the event to the member.
Entity: referring member number; referred member number
- Member transaction create or update
If a transaction is created or updated, for example, the transaction is canceled, then Oracle Responsys would send a communication for the event to the member.
Entity: Member number, partner, transaction number
- Member tier change
If a member's tier is changed, then Oracle Responsys would send a communication for the event to the member.
Entity: Member number, previous tier, new tier
- Member dynamic attribute create or update
If a dynamic attribute is created or updated, then Oracle Responsys would send a communication for the event to the member, for example: first flight taken; \$10 pending to reach goal of \$200 spent in a month.
Entity: Member number, dynamic attribute name, dynamic attribute value
- Member promotion enrollment
If a member is enrolled into a promotion, then Oracle Responsys would send a communication for the event to the member.
Entity: Member number, promotion name
- Member promotion-specific attribute create or update
If a promotion attribute is created or updated, then Oracle Responsys would send out a communication for the event to the member

Entity: Member number, promotion-specific attribute name, promotion-specific attribute value

Setting Up the Email Templates

You must set up email templates on Oracle Responsys Marketing Platform Cloud Service, for example, for a Welcome email when a new member is enrolled into Oracle Loyalty Cloud, or a notification email when a member gets updated or when a voucher is issued. You can set up the email templates using Email Message Designer as part of a campaign.

To set up an email template:

1. Create a campaign by one of the following methods:
 - Click the Envelope icon on the side navigation bar and select Create Campaign.
 - On the Manage Campaigns page, click Create Campaign.
2. In the Create campaign dialog, select Email.
3. On the Manage Campaigns page, click the name of the campaign to open the Campaign Workbook.
4. In the Message section, click the icon for Email Message Designer.

For more information on using Email Message Designer to set up the emails for the integration with Oracle Loyalty Cloud, see the online help available with Oracle Responsys Marketing Platform Cloud Service.

Creating Programs to Trigger Emails

You can use the Program Designer available with Oracle Responsys Marketing Platform Cloud Service to create the programs to send the emails when events occur.

Using the Program Designer, you can:

- Graphically map out your marketing campaign ideas and objectives.
- Create different experiences for each individual in a program based on their customer profile as well as their actions over time.
- Analyze your running programs in real- time so that you know the state of each stage and how the audience is flowing through the program.

For more information on using Program Designer to trigger the emails when events such as creating a member, updating a member, or issuing a voucher, occur in Oracle Loyalty Cloud,, see the online help available with Oracle Responsys Marketing Platform Cloud Service.

4 Configuring Oracle Integration Cloud

Preface


This chapter describes the tasks that you complete to configure Oracle Integration Cloud. For details on configuring orchestrated integrations using Oracle Integration Cloud, refer to the Using Integrations in Oracle Integration Cloud document.

Importing the Integration Package

Import the integrations and connections that are required for Oracle Integration Cloud.

To import the integration package:

1. Download the `loyalty.par` file from My Oracle Support.
2. Save the file to your computer and extract it.
3. Log in to Oracle Integration Cloud with sufficient privileges to create and modify connections, integrations, packages, and other artifacts.
4. Click Packages in the navigation pane.
5. On the Packages page, click Import.
6. In the Import Package File window, select the `loyalty.par` file, and then click Import.

 **Note:** If you have already imported the `loyalty.par` package, a warning indicates that the package and integrations within it will be overwritten. You can choose Import and Replace or Cancel.

7. After the package is imported, click Integrations in the navigation pane.

The following integration flows are created:

- `program_name_Member_Create`. This flow is invoked when a member is created in Oracle Loyalty Cloud.
- `program_name_Member_Update`. This flow is invoked when a member is updated in Oracle Loyalty Cloud.
- `program_name_Voucher_Create`. This flow is invoked when a voucher is created in Oracle Loyalty Cloud.

Along with the integration flows, the import also creates the following connections:

- Loyalty Cloud
- Oracle Responsys

Configuring the Connections

Modify the connections that were imported in the integration package.

The imported connections, Loyalty Cloud and Oracle Responsys, must be configured. They are only placeholders and lack information such as credentials and endpoint URLs.

To configure the connections:

1. In Oracle Integration Cloud, click Connections in the navigation pane, then select Loyalty Cloud.
2. On the Connection page, click Configure Connectivity.
3. In the Connection Properties window, complete the following field:

Field	Value
Connection URL	https://mysite.example.com/cgi-bin/myinterfacecfg

4. Click OK.
5. On the Connection page, click Configure Security.
6. In the Credentials window, complete the following fields:

Field	Value
Security Policy	Basic Authentication
User Name	Enter the user specified in EVENT_NOTIFICATION_MAPI_USERNAME.
Password/ Confirm Password	Enter the password specified in EVENT_NOTIFICATION_MAPI_PASSWD.

7. Click OK.
8. Test the connection by clicking the Test icon.

If the connection is configured correctly, then it should show 100% and be ready for run time.

9. Repeat steps 1 through 8 for the Oracle Responsys connection, using the following values:

Field	Value
Connection URL	Appropriate value for your Oracle Responsys instance, for example, https://login5responsysnet/
Security Policy	Custom Security Policy
User Name	Oracle Responsys user name.
Password/ Confirm Password	Oracle Responsys user password

Refer to Using the Oracle Responsys Adapter document for more information.

Regenerating the Integrations

Integration artifacts must be regenerated to remove any references to the creation-time connection URL.

Integration artifacts must be regenerated to remove any references to the creation-time connection URL

To regenerate the integrations:

1. On the Integrations page, click the name of an integration to edit it.
2. On the Editing page, click Actions, then select Regenerate artifacts.
3. In the Confirmation window, click Yes.
4. When the regeneration is finished, click Save.
5. Repeat steps 1 through 4 for each integration.

Activating the Integration Flows

Activate the integration flows that were imported in the package.

To activate the integration flows:

1. Make sure that each integration flow is 100% complete by checking the completion percentage in the Integrations page.

 **Note:** You will not be able to activate integration flows unless they are 100% complete.

2. For each integration flow, move the associated slider to the right.

The label changes to ACTIVE and a check mark is displayed.

5 Testing the Integration

Preface

This chapter describes the tasks that you complete to test that the integration works as expected.

Activating the Integrations in Oracle Integration Cloud

Activate the integration flows in Oracle Integration Cloud as described in the following steps.

To activate the integrations:

1. In the Oracle Integration Cloud navigation pane, click Integrations.
2. In the Integrations list, locate the integration you want to activate (for example, `program_name_Member_Create`, `program_name_Member_Update`, or `program_name_Voucher_Create`).
3. Click the icon to activate the integration.
4. In the displayed Confirmation dialog, ensure that you have selected Enable Tracing.

When you select Enable Tracing, Oracle Integration Cloud collects detailed logging information about messages processed by this integration flow at runtime. This can aid in troubleshooting issues, however, detailed tracing might impact performance. To disable tracing, you must deactivate the integration, then reactivate it without selecting the Enable tracing check box.

5. Click Activate.
6. Activate all the remaining integrations.

Creating a Member in Oracle Loyalty Cloud

When you enroll a member in a program, Oracle Loyalty Cloud automatically enrolls the member in all active promotions in the program. The member automatically is in the default tier for the program. To test the integration, enroll a new member in the Loyalty program you are using in the integration.

To create a member in Oracle Loyalty Cloud:

1. Click the Loyalty icon, then the Member icon.
2. In the Member screen, click Create Member and complete the necessary fields to create an individual member as follows: Choose Individual in the Type field, and choose an existing contact or create a new contact. Complete or update the member fields as required.
 - a. Choose Individual in the Type field, and choose an existing contact or create a new contact.
 - b. Complete or update the member fields as required.

Changing a Member's Tier in Oracle Loyalty Cloud

Typically, promotions change members' tiers when the members have accumulated the necessary number of points or some other necessary action needed to qualify for a different tier. However, you can manually change the member's tier.

To change a member's tier in Oracle Loyalty Cloud:

1. Navigate to the Loyalty Members screen.
2. Click the name of the member you are using to test the integration.
3. Click the Tier icon.
4. Click the Change Current Tier button, and complete the necessary fields.

Assigning a Voucher to a Member in Oracle Loyalty Cloud

You can set up promotions to issue vouchers, for example, when a member has accumulated the necessary number of points. However, you can also manually issue a voucher for the member.

To assign a voucher to a member in Oracle Loyalty Cloud:

1. Navigate to the Loyalty Members screen.
2. Click the name of the member you are using to test the integration.
3. Click the Vouchers icon.
4. Update the voucher fields as required.

Monitoring the Integrations in Oracle Integration Cloud

You can monitor the status of the integrations using the Tracking page in Oracle Integration Cloud.

To monitor the integration on Oracle Integration Cloud:

1. In the navigation pane, click Integrations, then click the < arrow next to DESIGNER.
2. Click Monitoring, and then click Tracking.

If the integrations complete without any issues, Oracle Integration Cloud lists them with a status of Completed on the Track Instances page. For the Loyalty integration example, the Tracking page lists the following integrations:

- o program_name_Member_Create
- o program_name_Member_Update
- o program_name_Voucher_Create

Ensuring that the Emails are Received

Check the email account for the Loyalty member used to test the integration, and verify that the integration has delivered the expected Welcome, Update, and Voucher emails.