

API Workflow: Loyalty Data

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Summary

Loyalty customers can earn cash back rewards for every dollar they spend, which can be calculated in the SessionM system as points. Additionally, there may be ongoing or campaign-based promotional activities that can earn a loyalty customer more points for their purchases. SessionM supports a client searching for a customer and retrieving that customer's loyalty data.

Use Case

The need to see a customer's loyalty data can derive from a variety of different contexts. For example, a client may want to see loyalty program tier information, so they can provide the customer with an offer that incentivizes them to make a purchase and reach the next tier of the loyalty program. These use case steps are typical for clients retrieving the loyalty data associated with a customer:

- Search for customer.
- Examine response for loyalty program data.

Data Configuration Prerequisites

This workflow presumes the client and SessionM have performed the following tasks before it can be implemented for retrieving loyalty data:

- Integration engineer has set up incentives domain on SMP.
- Integration engineer has worked with project manager and client to set up tiers/points.
- SessionM has created digital properties.
- Client's development team (focusing on middleware, POS, Web or mobile) has implemented Customer Profile, Points, and Tiers APIs.

Step by Step

The workflow describes searching for a customer and retrieving their loyalty program data.

When issuing curl commands for platform transactions, adhere to the following syntax:

- Begin each curl command with either `POST` or `GET`.
- Specify: `-H 'Content-Type: application/json' -H 'authorization: Basic token'`
- Begin URL with same endpoint + API key:
`https://[ENDPOINT]/priv/v1/apps/API_KEY`

Step 1: Lookup the Customer

The first step in this workflow is to lookup, or search for, the customer based on a known attribute. Typical queries use the customer's email address, phone number, or external ID. Using the Standard Profile API, specify one of these endpoints to search for the customer:

```
GET /priv/v1/apps/:api_key/users/search?email=test@example.com
GET /priv/v1/apps/:api_key/users/search?external_id=eutest17
GET /priv/v1/apps/:api_key/users/search?mobile_number=5089959991
```

These endpoints can be further refined with additional parameters. So, for example, the endpoint that searches by email might contain these additional parameters and look like this:

```
GET
/priv/v1/apps/:api_key/users/search?email=test@example.com&user[user_profile]=true&expand_incentives=true&show_identifiers=true
```

Using this version of the endpoint, you can expect to see the following content in the response:

- Custom attributes (`user[user_profile]=true`)
- Expanded incentives data that includes points, tiers or other loyalty fields (`expand_incentives=true`)
- External identifiers with their types (`show_identifiers=true`)

For more information on these additional parameters, see the [Endpoint Parameters section for the API that exposes customer search parameters](#).

After the endpoint makes the request for the query, the platform returns a response object, which is discussed in the next step.

Step 2: Understand the Core Loyalty Response

The next step in the workflow is understanding the core loyalty data returned in the response for the customer search. Since the response is a reflection of a specific loyalty program, it makes sense to consider the program's design by way of a sample implementation.

Point and Tier Data in Loyalty Program

The sample implementation under consideration is the "ACME" loyalty program. Customers can earn cash-back rewards for every dollar they spend, which is calculated in the SessionM system as points. Additionally, there are ongoing, campaign-based promotional activities that can earn a loyalty program member more points for their purchases. Defined cash-out periods are when the member's balances are redeemed in exchange for gift cards.

The amount spent by a loyalty program member in a given year makes them eligible for a particular tier, which gives them access to a set of benefits. SessionM tracks the member's tier status and distance to the next tier as well as manage all maintenance and entry rules governing the program.

Point Accounts

The ACME program stipulates that each customer can have 4 different point accounts: *ACME Spendable Account*, *ACME Spendable Escrow Account*, *ACME Tier-Qualifying Account*, and *ACME Tier-Qualifying Escrow Account*.

When a transaction is loaded to the SessionM system, it triggers the following points outcomes:

- Points are loaded to the *ACME Spendable Escrow Account*. These points stay in escrow for 30 days (the return period). If a return happens, the points are deducted from the escrow account automatically; otherwise, after 30 days, the points automatically roll over to the *ACME Spendable Account*.
- Points are loaded to the *ACME Tier-Qualifying Escrow Account*. These points stay in escrow for 30 days (the return period). If a return happens, the customer remains in the tier, but the points are deducted from the tier-qualifying escrow account; otherwise, these points go to the *ACME Tier-Qualifying Account* and trigger the tier movement immediately.

Tiers and Tier-Qualifying Points

Consult the following table for details on the ACME Tier System:

Tier	Rank	Qualification
Unenrolled	0	Default status for customer not enrolled in loyalty program or unenrolled from a loyalty program, if allowed.
Base	1	Does not expire.
Silver	2	Tier expires end of the following calendar year.
Gold	3	Tier expires end of the following calendar year.

Point and Tier Data for the User Object

Part of the response includes attributes that express points and tier data in the *user* object returned for the customer:

Response Excerpt
<pre>... "id": "6cb9eee8-4a90-11e9-b863-0242ac11000c", "external_id": "ZTEST002", "opted_in": true, "activated": false, "proxy_ids": [], "available_points": 2000, "test_points": 0, "unclaimed_achievement_count": 0, "email": "ztest002@example.com", "gender": "m", "dob": "1999-07-01", "created_at": "2019-03-19 21:46:17", "updated_at": "2019-03-22 18:12:03", "address": "222 Main St.", "address2": "APT 11", "city": "BOSTON", "zip": "02210", "dma": "506", "state": "MA", "country": "USA", "suspended": false, "last_name": "Lei", "first_name": "ZZZ002", "registered_at": "2019-03-19 21:46:17", "profile_photo_url": "/images/account-neutral.png", "account_status": "good",</pre>

```

"current_zip": "02210",
"current_dma": "506",
"current_state": "MA",
"current_country": "USA",
"tier": "SILVER",
"tier_system": "ACME Tier System",
"tier_points": 2000,
"next_tier_points": 8000,
"tier_ends_value": 10000,
"tier_entered_at": "2019-03-22 18:12:02",
"tier_resets_at": "2020-03-21 18:12:02",
...

```

This following table describes some of the important attributes (bolded) in the response:

Response Object	Response Attribute	Description
user	id	SessionM user ID associated with customer..
user	external_id	External user ID associated with customer.
user	available_points	Total points available for customer. Configurable. Can be ACME Spendable Account balance or can be calculated by adding balance of ACME Spendable Account + balance of ACME Spendable Escrow Account.
user	email	User email address.
user	tier	Current tier name.
user	tier_system	Current tier system.
user	tier_points	Balance of tier-qualifying account.
user	next_tier_points	Tier-qualifying points for next tier.
user	tier_ends_value	Target balance for next tier.
user	tier_entered_at	Time that current tier was joined.
	tier_resets_at	Time that current tier expires.

Tier Level and Point Data for the Tier Levels Object

Part of the response includes attributes that express tier level and points data in the *tier_levels* object returned for the customer:

Response Excerpt

```
...
"tier_details": {
  "tier_levels": [{
    "id": "7cbd3226-94fe-4c7e-b680-16da12483afe",
    "tier_system_id": "057fa4e6-b443-4a2c-a3da-23629e86b34b",
    "tier_level_id": "33fe1242-dbae-4545-95e0-7c73740b7d61",
    "user_id": "6cb9eee8-4a90-11e9-b863-0242ac11000c",
    "join_date": "2019-03-22T18:12:02.78",
    "tier_overview": {
      "id": "33fe1242-dbae-4545-95e0-7c73740b7d61",
      "tier_system_id": "057fa4e6-b443-4a2c-a3da-23629e86b34b",
      "retailer_id": "66f9b3f2-7770-4dca-ac8e-2a1ef7e8e54b",
      "name": "SILVER",
      "rank": 2,
      "status": 2
    },
    "next_tier_overview": {
      "id": "913bc21b-3906-4b86-9e23-016d6b286877",
      "tier_system_id": "057fa4e6-b443-4a2c-a3da-23629e86b34b",
      "retailer_id": "66f9b3f2-7770-4dca-ac8e-2a1ef7e8e54b",
      "name": "GOLD",
      "rank": 3,
      "status": 2
    },
    "tier_progress": [{
      "rule_tree_id": "5f8d9fb1-b4de-4d8e-a7d7-b144182fd84a",
      "rules": [{
        "query_result": 2000,
        "rule_id": "f2423f45-cb36-487e-a560-0bc2c6d062f4",
        "parent_id": "d2a7f6df-d878-4ff8-8a19-5936f5d3573f",
        "tree_id": "5f8d9fb1-b4de-4d8e-a7d7-b144182fd84a",
        "rule_passed": false,
        "rule": {
          "discriminator": 2048,
          "target_balance": 10000,
          "comparison": 4,
          "id": "f2423f45-cb36-487e-a560-0bc2c6d062f4",
          "retailer_id": "66f9b3f2-7770-4dca-ac8e-2a1ef7e8e54b",
          "parent_id": "d2a7f6df-d878-4ff8-8a19-5936f5d3573f",
          "rank": 0,
          "is_new": false,
          "constraints": [{
            "discriminator": 8,
            "point_accounts": {
```

```

        "d519facf-bdf8-a4683b20c6f1": "ACME Account"
    },
    "id": "f7cf3877-c83b-40f4-a963-202c4a0ebe58",
    "rule_id": "f2423f45-cb36-487e-a560-0bc2c6d062f4",
    "is_new": false,
    "rank": 0
    ]]
    },
    "discriminator": 2,
    "rule_tree_name": ""
  },
  ...

```

This following table describes some of the important attributes (bolded) in the response:

Response Object	Response Attribute	Description
tier_levels	join_date	Time current tier joined.
tier_overview	name	Current tier name.
tier_overview	rank	Current tier rank.
next_tier_overview	name	Next tier name.
next_tier_overview	rank	Next tier rank.
rule	target_balance	Target balance for next tier. Use to calculate points to achieve next tier. Points to next tier = <i>target_balance - tier_points</i> .

For more details on the tier system’s characteristics, see [Tiers and Tier-Qualifying Points](#).

Tier Level and Point Data for the Point Account Balances Object

Part of the response includes attributes that express tier level and points data in the *point_account_balances* object returned for the customer. This object contains the basic information for each of the accounts, as shown below:

Response Excerpt

```
...

"point_account_balances": {
  "retailer_id": "66f9b3f2-7770-4dca-ac8e-2a1ef7e8e54b",
  "user_id": "6cb9eee8-4a90-11e9-b863-0242ac11000c",
  "summary": {
    "total_points": 4000,
    "life_time_points": 4000
  },
  "details": [
    {
      "account_name": "ACME Spendable Account",
      "user_point_account_id": "2ad0914b-55a8-486c-a565-442e728e4e7f",
      "point_account_id": "657ebb21-af8a-48f1-86eb-3d239d7731ab",
      "grouping_label": "Spend",
      "available_balance": 2000,
      "life_time_value": 2000
    },
    {
      "account_name": "ACME Spendable Escrow Account",
      "user_point_account_id": "",
      "point_account_id": "f7465a37-0c79-45a6-b127-520bf1c696ca",
      "grouping_label": "",
      "available_balance": 0,
      "life_time_value": 0
    },
    {
      "account_name": "ACME Tier Qualifying Account",
      "user_point_account_id": "282420ea-1a2e-4ce7-8de5-6c007bcec17f",
      "point_account_id": "d519facf-bdf8-41ae-b6a1-a4683b20c6f1",
      "grouping_label": "Tier",
      "available_balance": 2000,
      "life_time_value": 2000
    },
    {
      "Account_name": "ACME Tier-Qualifying Escrow Account",
      "user_point_account_id": "",
      "point_account_id": "r519hacf-bdf8-57ae-b6a1-a4443b20c6c1",
      "grouping_label": "",
      "available_balance": 0,
      "life_time_value": 0
    }
  ]
}
```

```

    ]
}
...

```

This following table describes some of the important attributes (bolded) in the response:

Response Object	Response Attribute	Description
details (spendable account)	account_name	Name of spendable account.
details (spendable account)	available_balance	Balance of account. Use to calculate current earning (rewards balance).
details (spendable escrow account)	account_name	Name of spendable escrow account.
details (spendable escrow account)	available_balance	Use to calculate pending spendable points. After return period, these points rollover to spendable account.
details (tier qualifying account)	account_name	Name of tier-qualifying account.
details (tier qualifying account)	available_balance	Identical to <i>tier_points</i> at user level.
details (tier qualifying escrow account)	account_name	Name of tier-qualifying escrow account.
details (tier qualifying escrow account)	available_balance	Use to calculate pending tier qualifying points. After return period, these points rollover to tier qualifying account.