

# Off-Cycle August-2024 Release Notes

This document covers all product updates included with the **Off-Cycle August 2024 Release** issued on **August 20th, 2024**.

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Activating Campaigns			
Update	Summary	Configuration Effort	Value/Benefits
Activation/Enrollment Required Campaigns	<p><b>Description:</b> Previously, all rewards/benefits/points were awarded to all brand members regardless of whether they knowingly participated in earning the points/award. This may not reflect a member's interest in the benefit/reward. This enhancement allows brands to create their own campaigns that target member behaviors or patterns to incentivize members to actively participate and earn loyalty benefits for completing specific milestones.</p> <p><b>Prerequisites:</b></p> <ul style="list-style-type: none"> <li>• Enable the "Activation Required" flag, which is available within the campaign configuration. The flag can be enabled by an Annex Cloud administrator.</li> <li>• Activation API is required to enroll in the campaign.</li> </ul> <p><b>Use Case:</b> A brand wants to enable a campaign that requires a member to purchase a specific product in order to receive the points/award. The only way the member can get the reward is that the member will need to opt-in to activate the campaign before his purchase is recognized as part of the campaign. Create a campaign that requires activation, ensuring members willingly enroll to participate and earn benefits.</p> <p>The above use case gets executed in the following steps:</p> <ul style="list-style-type: none"> <li>• AC enables "Activation Required" flag</li> </ul>	<p><b>Low.</b></p> <p>Annex Cloud to enable the "Activation required" flag to create such campaign. When this flag is enabled, members must activate the campaign via the Activation API to participate and earn benefits. This enhancement adds the additional parameters in the Campaign APIs to show the activation details.</p>	<ul style="list-style-type: none"> <li>• It allows clients to create campaigns where members must opt in to participate and earn benefits.</li> <li>• Clients can analyze members' interest in each campaign and engage with them more personally.</li> <li>• Clients can send reminders to enrolled loyalty members who haven't participated or run surveys for non-enrolled members to gather feedback and encourage them to join.</li> </ul>

- Create a campaign where “Activation Required” flag is enabled.
- Target members activate the campaign via Activation API.
- Target members fulfill the campaign condition.
- The associated benefit is awarded.

For more details on this enhancement, please visit the Annex Cloud [Campaigns](#) help documentation page.

Rolling Campaigns			
Update	Summary	Configuration Effort	Value/Benefits
Rolling Campaign with Validity Window	<p><b>Description:</b> This enhancement allows clients to create a campaign where they can offer loyalty members different validity dates for the same benefit. This feature allows clients to:</p> <ol style="list-style-type: none"> <li>1. Create a campaign with a general validity period.</li> <li>2. Assign each member a personalized validity period within the campaign’s overall duration.</li> <li>3. Allow members to participate only during their assigned periods.</li> <li>4. Send new validity periods to members multiple times within the campaign’s overall duration, enabling members to participate more than once.</li> </ol> <p><b>Prerequisites:</b></p> <ul style="list-style-type: none"> <li>• The “Apply Individual Validity” flag should be enabled by a brand administrator and is available within campaign configuration.</li> <li>• Individual validity API is required to send the target member’s campaign validity period.</li> </ul> <p><b>Use Case:</b> A brand wants members to focus on a specific campaign. We can assign different validity dates to the target members within a campaign duration so that the members can participate and earn benefits during their valid dates only.</p> <p>The above use case gets executed in the following steps:</p> <ul style="list-style-type: none"> <li>• Create a campaign where “Apply Individual Validity” flag is enabled.</li> </ul>	<p><b>Low.</b></p> <p>Enable the “Apply Individual Validity” flag to create such campaign. When this flag is enabled, clients must use the Individual Validity API to set member validity dates. Members can only participate during their valid period.</p> <p><b>Note:</b> This enhancement requires the current Campaign APIs structure change so that we can show the campaign data within individual validities of the respective member. Therefore, the clients need to make the changes on their end to see the correct data in the Campaign APIs.</p>	<ul style="list-style-type: none"> <li>• This enhancement ensures members only engage in the campaign during the defined validity windows, as determined by the brand.</li> <li>• It removes the need for multiple or redundant campaigns.</li> </ul>

- Client sends the individual validities of members via individual validity APIs.
- Target members fulfill the campaign conditions within their validity period.
- The associated benefit is awarded.

For more details on this enhancement, please visit the Annex Cloud [Campaigns](#) help documentation page.

Campaign Groups			
Update	Summary	Configuration Effort	Value/Benefits
Campaign Groups	<p><b>Description:</b> This enhancement allows our clients to group multiple campaigns together. At the group level, clients can set different precedence rules to decide what action to take when a member qualifies for multiple campaigns at once.</p> <p><b>Prerequisites:</b> The “Enable Campaign Group” flag must be enabled by an administrator in the Super Admin to use this functionality.</p> <p><b>Restrictions:</b> This functionality is not currently compatible with the Order API as of now.</p> <p><b>Use Cases:</b></p> <ol style="list-style-type: none"> <li>1. Award members the benefits of all valid campaigns if they meet the conditions for multiple campaigns in a single activity. This will ensure they feel delighted about achieving multiple rewards simultaneously.</li> </ol> <p>The above use case gets executed in the following steps:</p> <ul style="list-style-type: none"> <li>• Create a campaign group.</li> <li>• Add the applicable campaigns to it.</li> <li>• Select the precedence rule as “All eligible campaigns should be applied at a time”.</li> <li>• Target member fulfills the conditions of three campaigns in a single activity and earns the benefit of all three campaigns.</li> </ul> <ol style="list-style-type: none"> <li>2. Set the rule to apply the campaign with the highest points when a member qualifies for multiple campaigns in a single activity. This ensures the member receives the best benefit. This also helps control liabilities by not awarding multiple campaign benefits.</li> </ol>	<p><b>Medium.</b></p> <p>The client needs to create a group, add the relevant campaigns to it, and then set the precedence rule.</p>	<ul style="list-style-type: none"> <li>• Setting the campaign precedence rule at a group level provides greater flexibility, allowing clients to tailor campaign rules to specific groups rather than applying a one-size-fits-all approach at the site level.</li> <li>• Enhances the ability to manage campaigns more effectively by considering the unique needs and behaviors of different groups, which helps in better managing liabilities.</li> </ul>

The above use case gets executed in the following steps:

- Create a campaign group.
- Add the applicable campaigns to it.
- Select the precedence rule as "Highest points campaign should be applied at a time".
- When a member qualifies for three campaigns in a single activity, they receive the benefit of the campaign with the highest points.

For more details on this enhancement, please visit the Annex Cloud [Campaign Group](#) help documentation page.

### Multiple Segments in a Campaign

Update	Summary	Configuration Effort	Value/Benefits
Campaign with Multiple Conditions	<p><b>Description:</b> This enhancement allows you to create a campaign with multiple conditions, each offering unique benefits. This flexibility wasn't available before, so we're improving campaigns to include conditional variants as segments. Each segment can be pulled into a campaign milestone and can have its own benefits.</p> <p><b>Prerequisites:</b> None</p> <p><b>Use Case:</b> Create a "Spend more earn more" campaign where members who spend between 100-200 should earn 2x points and the members who spend between 201-500 should earn 3x points.</p> <p>The above use case gets executed in the following steps:</p> <ul style="list-style-type: none"> <li>• Create two segments, one with the amount spend condition of 100-200 (let's call it as Segment A) and the second one with the amount spend condition of 201-500 (Segment B).</li> <li>• Create a campaign where one milestone will have Segment A, milestone action as Purchase and benefit as 2x. Another milestone will have Segment B, milestone action as Purchase and benefit as 3x.</li> <li>• A member spends 150 and earns 2x from the above campaign.</li> </ul>	<p><b>Low.</b></p> <p>Clients can create multiple milestones for the same "action," such as a Purchase Action, and add different segments or tiers to each milestone with unique benefits.</p>	<ul style="list-style-type: none"> <li>• Clients can create a single campaign with multiple conditions and benefits.</li> <li>• All of a campaign's data is consolidated under one umbrella, enabling comprehensive analysis and reporting.</li> </ul>

- A member spends 300 and earns 3x from the same campaign.

For more details on this enhancement, please visit the Annex Cloud [Campaigns](#) help documentation page.

### Campaign Milestones

Update	Summary	Configuration Effort	Value/Benefits
Separate Transaction Activity for Campaign Milestone Benefit	<p><b>Description:</b> This feature enables the separate tracking of campaign milestone benefits using Action ID 178. Currently, it does not support distinguishing and monitoring the original action points from the campaign milestone points.</p> <p><b>Prerequisites:</b> The "Display Separate Campaign Milestone Activity" Super Admin flag should be activated to view the individual activities for campaign milestone benefits. The Points API supports this feature when enabled, while the new Issuance (Order) API will exhibit this behavior by default.</p> <p><b>Restrictions:</b> The current Order API does not support this functionality.</p> <p><b>Use Cases:</b></p> <p>Different member behaviors are separated so a brand can implement incentives or benefits to better engage with its customers.</p> <ol style="list-style-type: none"> <li>1. If a member spends <math>\geq 1000</math> on the order, they will receive 2x points.           <ul style="list-style-type: none"> <li>• For an order with a total spend of 1000, the potential points awarded will be 1000 (based on a 1x ratio).</li> <li>• The milestone to monitor orders/spend from the issuance API is set at action 174.</li> <li>• The member should be awarded a total of 2000 points.</li> <li>• This comprises 1000 Base Points <b>AND</b> 1000 Campaign Milestone Benefit Points.</li> <li>• Two activities need to be generated: 1000 points for action ID 174 - Base Points, and another 1000 points for action ID 178 - Campaign Milestone Benefit Points.</li> </ul> </li> <li>2. When a member signs up for the newsletter within a specific time frame, they will receive 1000 points.           <ul style="list-style-type: none"> <li>• The action ID for newsletter sign-up is 102, with 500 action points allocated.</li> </ul> </li> </ol>	<p><b>Low.</b></p> <p>The customer needs to enable this flag to see the separate activities for the campaign milestone benefit.</p>	<p>Members can see the separate activities for the campaign benefits. It allows administrators to view customer engagement across various promotions and participation activities.</p>

- Upon signing up, the member will receive a total of 1000 points.
  - This transaction includes 500 base points for action ID 102 and 500 campaign milestone benefit points for action ID 178.
3. An additional 1000 points is awarded on top of the original action points when a member signs up for the newsletter within a specific time frame.
- The action ID for newsletter sign-up is 102, with 500 action points allocated.
  - Upon signing up, the member will receive a total of 1500 points.
  - This transaction includes 500 base points for action ID 102 and 1000 campaign milestone benefit points for action ID 178.
- For more details on this enhancement, please visit the Annex Cloud [Campaigns](#) help documentation page.

RFM Dashboard Report			
Update	Summary	Configuration Effort	Value/Benefits
Recency, Frequency, and Monetary (RFM) Dashboard Report	<p><b>Description:</b> This report helps you categorize customers based on their purchase behavior, focusing on how often they buy (Frequency), when they last bought (Recency), and their average spending (Monetary).</p> <p><b>Prerequisites:</b> None</p> <p><b>Use Case:</b> The RFM dashboard reporting enhancement provides valuable insight into customer behaviors and can reveal members who are no longer active within the loyalty program. For example, if you wanted to identify members who haven't made a purchase in the last 30 days, but did place more than 10 orders in the past year with an average order value exceeding 100 dollars, use the RFM dashboard report.</p> <p>The above use case gets executed in the following steps:</p> <ul style="list-style-type: none"> <li>• The RFM Dashboard report should have a recent transaction metrics set as 30+ days, orders count should be set as 10+ in last 1 year's timeframe and AOV metrics should be set as 100+.</li> </ul>	<p><b>Low.</b></p> <p>Clients can customize the report metrics based on recency, frequency, and monetary ranges to target specific customer segments according to their needs.</p>	<p>The RFM report helps clients analyze customer purchase behavior to identify loyal customers for targeted loyalty campaigns. It also helps re-engage lost customers who haven't made purchases in a while through targeted campaigns aimed at increased customer motivation.</p>

- The qualifying members can be exported or added directly into a new segment.

For more details on this enhancement, please visit the Annex Cloud [RFM Dashboard](#) help documentation page.

Store Segmentation			
Update	Summary	Configuration Effort	Value/Benefits
Supports Segmentation Criteria of Store Attributes	<p><b>Description:</b> This update focuses on enhancing store management functionality by implementing several key improvements:</p> <ul style="list-style-type: none"> <li>• Removal of Manage Store Levels: The "Manage Store Levels" option will be eliminated from all sections, simplifying the user interface and streamlining store management processes.</li> <li>• Creation of Store Attributes: Brand administrators will now have the capability to create custom store attributes, providing greater flexibility in defining and managing store characteristics.</li> <li>• Conditional Exclusions for Segments: Brand administrators can add conditions to exclude specific Store IDs and Store Attributes when creating segments, allowing for more targeted and refined segmentation.</li> <li>• Store API Enhancements: Support for POST and PATCH operations in the Store API will be introduced, enabling administrators to create and update store information.</li> </ul> <p><b>Prerequisites:</b> Store and Segmentation setup.</p> <p><b>Use Cases:</b> A brand might have many stores, and each store has its own needs and data. Store management enables a brand to customize stores individually, including setting up new stores and increasing store participation in marketing campaigns.</p> <ol style="list-style-type: none"> <li>1. New Store Setup <ul style="list-style-type: none"> <li>• A brand administrator creates a new store and defines custom store attributes such as opening hours, store type, and customer demographics.</li> </ul> </li> <li>2. Marketing Campaigns</li> </ol>	<b>High.</b>	<ul style="list-style-type: none"> <li>• By removing the "Manage Store Levels" option, a new brand can quickly access the store management features without getting overwhelmed by unnecessary options.</li> <li>• Custom store attributes allow brands to customize how they manage their stores according to their specific needs.</li> <li>• Conditional exclusions help divide things more precisely, making marketing and operations work better.</li> <li>• The inclusion of POST and PATCH operations in the Store API makes it easier to integrate and update data, simplifying how information is handled.</li> </ul>

- A brand marketing team targets only specific stores for a campaign by excluding stores that do not meet certain criteria (e.g., low sales volume) using conditional exclusions.

For more details on this enhancement, please visit the Annex Cloud [Stores](#) help documentation page.

### Points API - Store ID Attribute

Update	Summary	Configuration Effort	Value/Benefits
<p>Redemptions Processed Only with Valid Store ID</p>	<p><b>Description:</b> This feature ensures that redemptions in the Points API are processed only if a valid store ID with action ID 107 is passed. If the store ID is invalid or missing, the redemption will fail, and a meaningful error message will be returned.</p> <p><b>Prerequisites:</b></p> <ul style="list-style-type: none"> <li>• Enable the "Enable Store ID Validation for Redemption" flag in the reward section settings at the on-site level.</li> <li>• Ensure that the store ID is correctly configured.</li> </ul> <p><b>Restrictions:</b> This feature is applicable only to transactions with action ID 107 and valid store ID.</p> <p><b>Use Case:</b> A client wants to enable redemptions based on the valid store ID only.</p> <p>The above use case gets executed in the following steps:</p> <ul style="list-style-type: none"> <li>• Brands should make sure that the "Enable Store ID Validation for Redemption" flag is enabled.</li> <li>• Ensure that all store IDs are correctly configured.</li> <li>• Loyalty members must send their store ID for redemption.</li> <li>• The system will verify whether the store ID is valid or invalid.</li> <li>• If the store ID is valid, the redemption will proceed. Otherwise, the redemption will fail and provide a proper message to the member.</li> </ul>	<p><b>Medium.</b></p> <ul style="list-style-type: none"> <li>• Client needs to ensure that the "Enable Store ID Validation for Redemption" flag is enabled in the reward section settings.</li> <li>• Clients must ensure that their store IDs are correctly configured and maintained to avoid validation errors.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Data Integrity:</b> Ensures that all redemptions are associated with valid store IDs, maintaining the integrity of transaction data.</li> <li>• <b>Enhanced Reporting:</b> Allows for detailed reporting and analysis of redemptions by store, providing valuable insights.</li> <li>• <b>Configuration Flexibility:</b> Adds an option to enable or disable store ID validation for redemptions, allowing flexibility based on business needs.</li> </ul>

For more details on this enhancement, please visit the following Annex Cloud help documentation pages:

- [All Interaction Report](#)
- [Reward Report](#)
- [Rewards Section Settings](#)

Issuance API			
Update	Summary	Configuration Effort	Value/Benefits
New Issuance (Order) APIs to process orders	<p><b>Description:</b> This new API enables the processing of orders. It accepts the values (spend, points, attributes) provided by the client in the request and grants the corresponding benefit to the member without any alterations. This API differs from the conventional approach of processing orders, which involves utilizing an in-house points system and spend calculation mechanism.</p> <p><b>Prerequisites:</b> The configuration of Action ID 174 is essential for order acceptance, while Action ID 175 is for processing returns. Both actions must be properly set up to ensure smooth operations.</p> <p><b>Use Case:</b></p> <ul style="list-style-type: none"> <li>• The objective is to handle order processing within the loyalty system. The management of spending and points calculations has already been addressed by the third-party system. The API is designed with the ability to receive values, process orders, and grant the benefits requested.</li> <li>• Adds the capability to place orders on hold. The management of these holds can differ, allowing me the flexibility to determine which orders should be placed on hold and which ones should not.</li> <li>• Adds the capability to edit and adjust the current order that is on hold (not confirmed yet). This modification can encompass changes related to expenditures, points, attributes, product data, and more.</li> </ul> <p>For more details on this enhancement, please visit the following Annex Cloud <a href="#">Issuance API - Segmentation</a> help documentation page.</p>	<p><b>High.</b></p> <p>To integrate this API into a third-party system, customers must manage all aspects of the calculation process. This includes tracking expenditures, awarding points, processing returns and debits, and deducting expenses from member accounts. The handling of order updates using PATCH and PUT methods should be done conditionally, depending on the specific use cases. The API parameter mapping should cover both predefined API attributes and dynamic attributes effectively.</p>	<p>Customers can now manage calculations and expenses independently, rather than relying on conventional methods for point calculation and spending. This API enables the acceptance of multiple product and order attributes without the need for predefined configurations, facilitating the storage of more relevant data. Moreover, the system permits the creation of target audiences and promotions based on the information obtained through the Issuance (Order) API. This API supports the non-purchase transaction as well with different Action ID. This API allows access to order data with comprehensive filtering options and also offers the flexibility to set an order hold on a per-order basis, allowing for editing if the order is not yet confirmed.</p>