Gap to Upgrade and Gap to Renew

Summary

Loyalty now supports view and communication of gap to upgrade and gap to renew information to end customers. Gap to Upgrade refers to purchases/points that the customer has to earn to get upgraded to the next higher tier; Gap to Renew refers to purchase/points/visits that the customer has to make to retain their current tier.

The information on gap to upgrade and gap to renew will act as a nudge for the end-customer to make their next purchase. If the gap to upgrade value is small for an end-customer, the information acts would act a nudge for them to make the purchase for the remaining amount and upgrade the tier. Similarly, if the customer is close to meeting their tier renewal criteria, the information on gap to renew will help them make purchase for the remaining amount

Feature Summary

- The Get Customer Details API (v1.1) supports information to gap to upgrade and gap to renew. This could be used to display the information on mobile app/microsite

- The downgrade reminder communication in loyalty supports communication tags related to gap to renew

- Engage+ supports communication tags related to gap to upgrade and gap to renew

Limitation

The communication from Loyalty EventView events don't support gap to upgrade and gap to renew tags

Gap to Upgrade in API

Gap to Upgrade in Get Customer Details API (v1.1)

Gap to upgrade information for a customer includes:

- Upgrade criteria for the current tier of the customer. This includes upgrade criteria and threshold as configured in the upgrade strategy for the program. Currently upgrade strategy supports upgrade only on one criteria. The gap to upgrade information isn't available for upgrade actions configured in loyalty rules

- Current Value - This provides information on the current value of the upgrade criteria for the customer. E.g, if 'lifetime purchases' is the upgrade criteria, the 'current value' will provide current lifetime purchase value for the customer. Similarly, if 'tracker' is the upgrade criteria, the 'current value' will provide the current tracker value for the customer

Special Case for Trackers

If the upgrade strategy of a program is based on a tracker, the gap information will be dynamic. This means that the gap to upgrade value on a specific day may be lower than the value one week later. To account for this dynamic nature, the gap to upgrade information has to be fetched for a specific day e.g. value for current day; value valid for 1 week; and value valid for 1 month

Endpoint

```
http://{{URL}}/v1.1/customer/get?
mobile=919884873878&mlp=true&gap_to_upgrade_for=<applicable_days>
```

Query Parameters

- **mlp=true**. The gap to upgrade information will be available when mlp=true is passed in the query parameter

- **gap_to_upgrade_for=<applicable_days>**. Given the dynamic nature of gap to upgrade value, applicable days refers to number of days for which gap to upgrade value remains valid
    - applicable_days = 0 → This means that gap to upgrade value in response will be valid for the current day
    - applicable_days = 7 → This means that gap to upgrade will be valued for next 7 days

Endpoint (for Current Day Gap to Upgrade)

```
http://{{URL}}/v1.1/customer/get?mobile=919884873878&mlp=true&gap_to_upgrade_for=0
```

Response

Sample Response Snippet (with Tracker Upgrade Strategy)

```json
"gap_to_upgrade": {
 "upgrade_strategy": [
  {
    "upgrade_based_on": "TRACKER_VALUE_BASED",
    "upgrade_entity_identifers": {
     "tracker_name": "2 Years Upgrade Tracker",
     "tracker_type": "BILL_AMOUNT",
     "tracker_mode": "MOVING_WINDOW",
     "tracker_case_name": "730Days_Case",
     "tracker_case_period_type": "DAYS",
     "tracker_case_period_value": "730"
    },
    "upgrade_threshold": "25000",
    "customer_upgrade_entity_values": {
     "current_value": "9786",
     "gap_to_upgrade": "15214",
     "value_valid_upto": "2022-05-06"
    }
   }
  ]
}
```

Sample Response Snippet (with Lifetime Points Strategy)

```json
"gap_to_upgrade": {
 "upgrade_strategy": [
  {
    "upgrade_based_on": "CUMULATIVE_POINTS",
    "upgrade_entity_identifers": { },
    "upgrade_threshold": "5000",
    "customer_upgrade_entity_values": {
     "current_value": "400.49",
     "gap_to_upgrade": "4599.51",
     "value_valid_upto": "2120-05-04"
    }
   }
  ]
}
```

Field Description

Field/Section Label	Description
upgrade_based_on	This field captures whether the upgrade strategy is based on lifetime purchases, current points, lifetime points, or tracker. Below are the possible values: ● CUMULATIVE_PURCHASES ● CURRENT_POINTS ● CUMULATIVE_POINTS ● TRACKER_VALUE_BASED
upgrade_entity_iden tifers	This section will be updated only when the upgrade strategy is tracker-based. If the upgrade strategy is tracker based, this section will include the following fields: ● tracker_name ● tracker_type ● tracker_mode ● tracker_case_name ● tracker_case_period_type ● tracker_case_period_value
upgrade_threshold	This is the upgrade threshold set in upgrade strategy for customer's current tier
customer_upgrade_ entity_values	This section includes the following fields: ● current_value ● gap_to_upgrade ● value_valid_upto
current_value	This field provides the value that the customer has already achieved against the tier upgrade threshold. E.g. if the upgrade is based on lifetime purchases, this field will provide current_value of lifetime purchases; if the upgrade is based on tracker value, this field will provide current tracker value
gap_to_upgrade	This field provides the gap to upgrade value - once a customer makes purchases/earn points to cover gap to upgrade value, they will get upgraded
value_valid_upto	For tracker-based upgrade strategy, this provides date till which the current tracker value is applicable For non-tracker based upgrade strategy, this will be the tier expiry date

Gap to Renew in API

Gap to Renew in Get Customer Details API (v1.1)

Gap to renew information for a customer includes:

- renewal criteria for the current tier of the customer. This includes renewal criteria configured in the downgrade strategy. The renewal criteria could be configured for 'purchases', 'visits', 'points earned', and 'tracker value'

- Whether the customer has already met the renewal criteria. If yes, the customer's tier will get renewed on the tier expiry

- Renew Threshold - This provides information about renewal threshold. If a customer achieves any of the renewal thresholds, their tier get renewed on the day of tier expiry

- Customer Renew Entity Value - This provides information on what the customer has already achieved for a specific renewal criteria. E.g, if 'purchase' is one of the criteria for tier renewal, the 'customer renew entity value' will provide the sum of purchases that the customer has done since the last tier change date. If 'customer renew entity value' is greater renewal threshold, it means that the customer has already met the renewal criteria

- Customer Gap to Renew - This is the difference between renewal threshold and customer renew entity value. That is, it provides information on additional purchases, visits or points earning that the customer has to do to renew their current tier

Endpoint

http://{{URL}}/v1.1/customer/get?mobile=919884873878&mlp=true&gap_to_renew_for=0

Query Parameters

- **mlp=true**. The gap to renew information will be available when mlp=true is passed in the query parameter

- **gap_to_renew_for=0**. This provides information about the gap to renew values for the day the API is called

Response

Sample Response

```
"gap_to_renew": {
  "tier_expiry_date": "2020-09-03",
  "renew_confirmed": "false",
  "renew_strategy": [
    {
      "renew_based_on": "VISITS",
      "renew_entity_identifiers": {},
      "renew_threshold": "56000",
      "customer_renew_entity_value": "1",
      "customer_gap_to_renew_value": "55999"
    },
    {
      "renew_based_on": "PURCHASE",
      "renew_entity_identifiers": {},
      "renew_threshold": "30000",
      "customer_renew_entity_value": "1200",
      "customer_gap_to_renew_value": "28800"
    },
    {
      "renew_based_on": "POINTS",
      "renew_entity_identifiers": {},
      "renew_threshold": "50000",
      "customer_renew_entity_value": "460",
      "customer_gap_to_renew_value": "49540"
    }
  ]
}
```

Field Description

Field/Section Label	Description
tier_expiry_date	Expiry date of the current tier of the customer
renew_confirmed	The possible values include **true** and **false**. True means that the customer has already met the renewal criteria and their current tier will get renewed on the date of tier expiry If the value is **true**, subsequent sections in the response will be blank
renew_strategy	This includes the customer's renew entity value and gap to renew for each of the renewal criteria
renew_based_on	This is corresponding to renewal criteria. The possible values include: ● PURCHASE ● POINTS ● VISITS ● TRACKER_VALUE_BASED
renew_entity_identifiers	If the renewal criteria is tracker based, this section will include the following fields: ● tracker_name ● tracker_type ● tracker_mode ● tracker_case_name ● tracker_case_period_type ● tracker_case_period_value
renew_threshold	This fields provides the renewal threshold for the renewal criteria
customer_renew_entity_value	This provides information on what the customer has already achieved for a specific renewal criteria. E.g, if 'purchase' is one of the criteria for tier renewal, the 'customer renew entity value' will provide the sum of purchases that the customer has done since the last tier change date
customer_gap_to_renew_value	This is the difference between renewal threshold and customer renew entity value. That is, it provides information on additional purchases, visits or points earning that the customer has to do to renew their current tier

Gap to Renew tags in Downgrade Reminder Communication

The downgrade reminder communication i.e. 'Alert Customer before Downgrade' in downgrade strategy includes tags corresponding to gap to renew.

Important Note 1: As the list of available tags aren't program specific, please select tags as per program's downgrade strategy
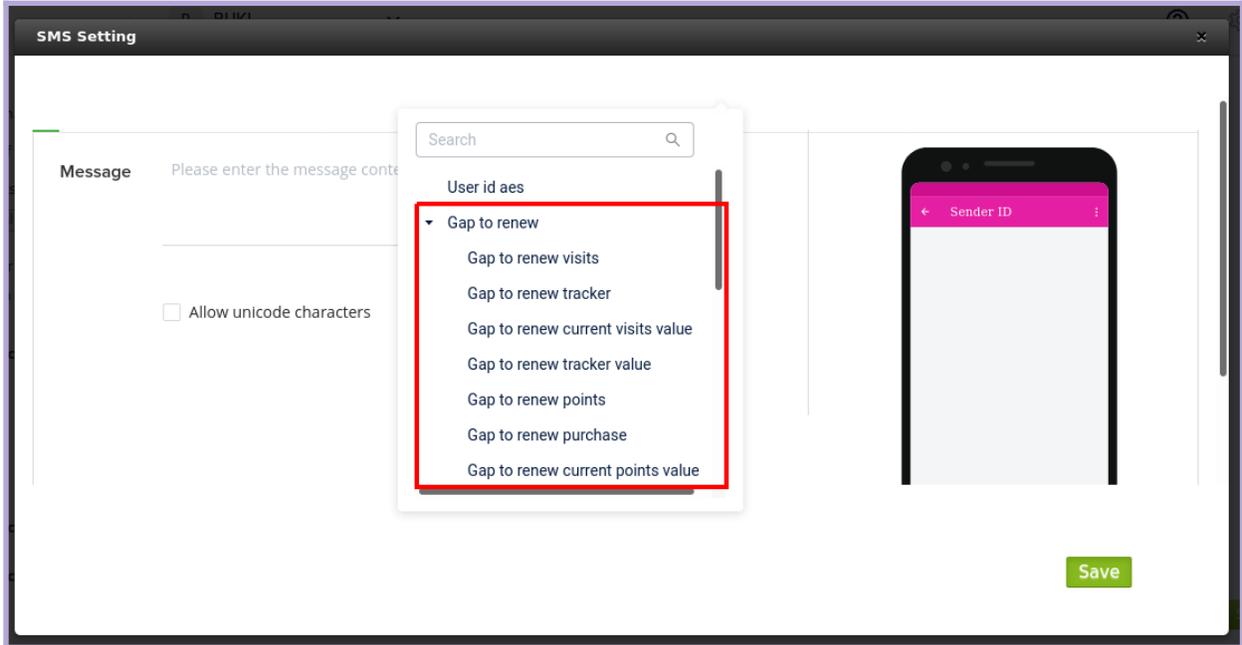
Screenshot - Gap to Renew Tags in Downgrade Reminder Communication

Limitation

The communication from Loyalty EventView events don't support gap to upgrade and gap to renew tags

Gap to Renew Tags in Downgrade Reminder Communication

Gap to Renew tags	
Gap to renew *visits*	This tag to be used if downgrade condition includes 'visits' for the current tier of targeted customers, and the targeted customers aren't in the lowest tier This tag provides the additional number of visits that a customer should do to retain their current tier. E.g. if tier renewal requires 10 visits and customer has made 4 visits, this tag will have the value 6

Gap to renew *points*	This tag to be used if downgrade condition includes 'points' for the current tier of targeted customers, and the targeted customers aren't in the lowest tier This tag provides additional number of points that a customer should earn to retain their current tier
Gap to renew *purchase*	This tag to be used if downgrade condition includes 'purchase' for the current tier of targeted customers, and the targeted customers aren't in the lowest tier This tag provides additional purchase that a customer should do to retain their current tier
Gap to renew *tracker*	This tag to be used if downgrade condition includes a 'tracker' for the current tier of targeted customers, and the targeted customers aren't in the lowest tier This tag provides additional tracker value that a customer should achieve to retain their current tier. This tag is for the 1st tracker configured against the tier
Current Value Tags	
Gap to renew current *visits* value	This tag to be used if downgrade condition includes 'visits' for the current tier of targeted customers, and the targeted customers aren't in the lowest tier This tag provides the number of visits that the customer has already done as part of downgrade evaluation. For downgrade strategies where tier evaluation period = tier period, this tag provides the number of visits since the last slab change date. E.g. if tier renewal requires 10 visits and customer has made 4 visits, this tag will have the value 4
Gap to renew current *points* value	This tag to be used if downgrade condition includes 'points' for the current tier of targeted customers, and the targeted customers aren't in the lowest tier This tag provides points that the customer has already earned as part of downgrade evaluation i.e. points earned since the last slab change date
Gap to renew current *purchase* value	This tag to be used if downgrade condition includes 'purchase' for the current tier of targeted customers, and the targeted customers aren't in the lowest tier This tag provides sum of purchase amount that the customer has already done as part of downgrade evaluation i.e. sum of purchases made since the last slab change date
Gap to renew *tracker* value	This tag to be used if downgrade condition includes a 'tracker' for the current tier of targeted customers, and the targeted customers aren't in the lowest tier

	This tag provides current tracker value of the first tracker configured in the downgrade strategy

Gap to Upgrade and Gap to Renew tags in Engage+ Communication

Important Note: As the list of available tags aren't program/Org specific, please select tags as per program's upgrade and downgrade strategy

Gap to Renew Tags in Engage+

Gap to Renew tags	
Gap to renew *visits*	This tag to be used if downgrade condition includes 'visits' for the current tier of targeted customers, and the targeted customers aren't in the lowest tier This tag provides the additional number of visits that a customer should do to retain their current tier. E.g. if tier renewal requires 10 visits and customer has made 4 visits, this tag will have the value 6
Gap to renew *points*	This tag to be used if downgrade condition includes 'points' for the current tier of targeted customers, and the targeted customers aren't in the lowest tier This tag provides additional number of points that a customer should earn to retain their current tier
Gap to renew *purchase*	This tag to be used if downgrade condition includes 'purchase' for the current tier of targeted customers, and the targeted customers aren't in the lowest tier This tag provides additional purchase that a customer should do to retain their current tier
Gap to renew *tracker*	This tag to be used if downgrade condition includes a 'tracker' for the current tier of targeted customers, and the targeted customers aren't in the lowest tier This tag provides additional tracker value that a customer should achieve to retain their current tier. This tag is for the 1st tracker configured against the tier
Current Value Tags	
Gap to renew current *visits* value	This tag to be used if downgrade condition includes 'visits' for the current tier of targeted customers, and the targeted customers aren't in the lowest tier This tag provides the number of visits that the customer has already done as part of downgrade evaluation. For downgrade strategies where tier evaluation period = tier period, this tag provides the number of visits since the last slab change date. E.g. if tier renewal requires 10 visits and customer has made 4 visits, this

	tag will have the value 4
Gap to renew current *points* value	This tag to be used if downgrade condition includes 'points' for the current tier of targeted customers, and the targeted customers aren't in the lowest tier This tag provides points that the customer has already earned as part of downgrade evaluation i.e. points earned since the last slab change date
Gap to renew current *purchase* value	This tag to be used if downgrade condition includes 'purchase' for the current tier of targeted customers, and the targeted customers aren't in the lowest tier This tag provides sum of purchase amount that the customer has already done as part of downgrade evaluation i.e. sum of purchases made since the last slab change date
Gap to renew *tracker* value	This tag to be used if downgrade condition includes a 'tracker' for the current tier of targeted customers, and the targeted customers aren't in the lowest tier This tag provides current tracker value of the first tracker configured in the downgrade strategy

Gap to Upgrade Tags in Engage+

Gap to upgrade *lifetime points*	This tag to be used if upgrade strategy is based on 'lifetime points' and targeted customers aren't in the highest tier This tag provides the additional points that the customer should earn to upgrade to the next higher tier
Gap to upgrade *lifetime purchases*	This tag to be used if upgrade strategy is based on 'lifetime purchases' and targeted customers aren't in the highest tier This tag provides additional purchases that the customer should do to upgraded to the next higher tier
Gap to upgrade *customer points*	This tag to be used if upgrade strategy is based on 'current points' and targeted customers aren't in the highest tier This tag provides additional points that the customer should earn before any point redemption or expiry to get upgraded to the next highest tier
Gap to upgrade *tracker value*	This tag to be used if upgrade strategy is based on a 'tracker' and targeted customers aren't in the highest tier This tag provides the current tracker value for the customer
Gap to upgrade *tracker validity*	This tag to be used if upgrade strategy is based on a 'tracker' and

	targeted customers aren't in the highest tier
	This tag provides the date till which the current tracker value will be applicable
Gap to upgrade *tracker*	This tag to be used if upgrade strategy is based on a 'tracker' and targeted customers aren't in the highest tier
	This tag provides additional tracker value that a customer should achieve to get upgraded to the next higher tier. This gap to upgrade value will remain valid till the tracker validity period