Loyalty Program

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Thrive's loyalty solution is divided into three programs, points, rewards and VIP. The major differences between them are the type of tasks you would find, the reward generation process, and, of course, their use cases.

Points program

Points programs are great when it comes to engaging and retaining your customers. You can add or create various engaging tasks for your customers and reward them with points on successful completion.

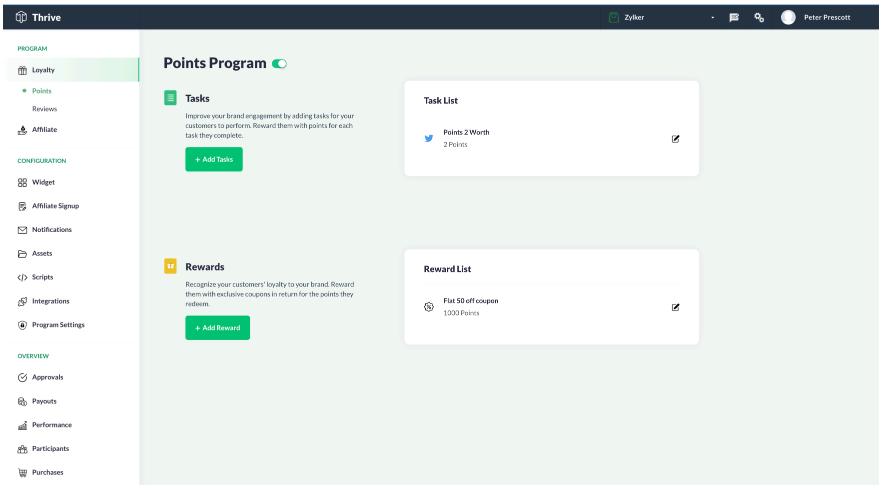
The following default tasks are available in Zoho Thrive:

Task name	Goal	How it works
Become a Member	Attract more customers to join the program.	Each customer will receive the configured points as a welcome bonus when they join the program for the first time.
Refer a Friend	Use loyalty participants to bring in new customers (referrals) to your business.	Loyalty participants will receive the configured points when their referral signs up to your store.
Referral Purchase	Initiate referral purchases using loyalty participants.	Loyalty participants get rewarded when their referral purchases something from your store. Note: It is not mandatory for a referral to sign up to the store/site or to the program for the task to be considered complete.
Make a Purchase	Encourage more purchases.	The loyalty participant will receive the configured points for every unit of currency they spend in your store.

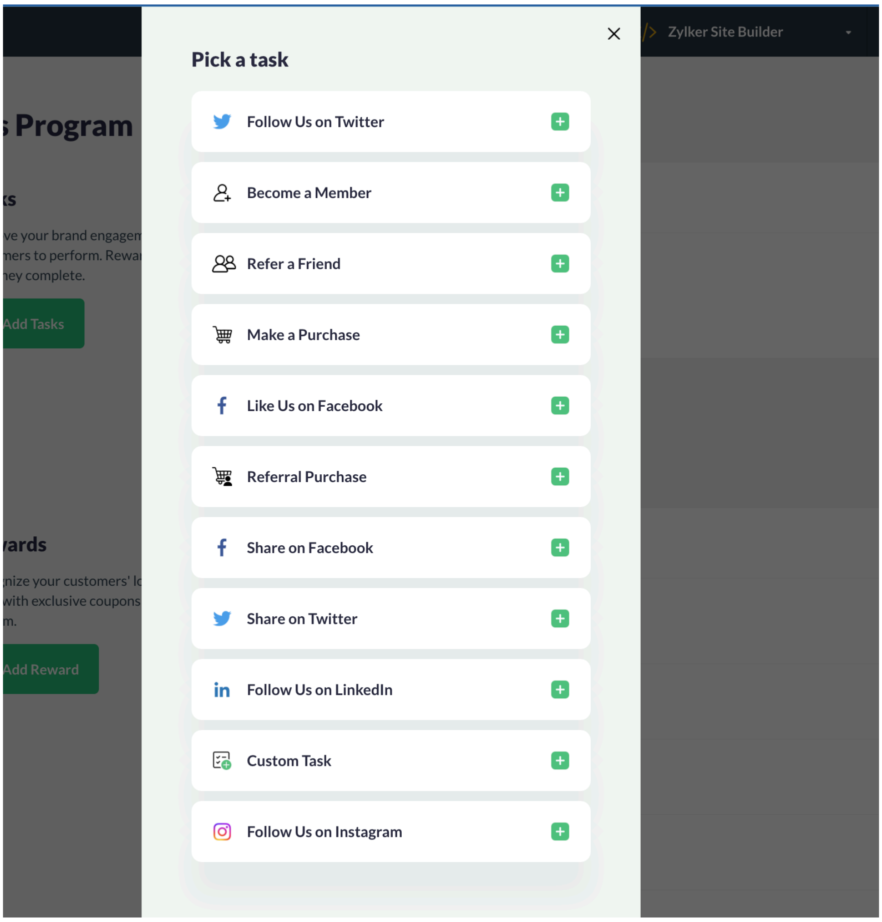
		Note: It is not mandatory for a participant to click the 'Make a Purchase' button inside the widget for the task to be considered complete. Any purchase post opt-in qualifies for task completion.
Share on Twitter	Promote your offerings via the loyalty participant’s Twitter.	The loyalty participant will receive the configured points for every Twitter share they perform.
Share on Facebook	Promote your offerings via the loyalty participant’s Facebook.	The loyalty participant will receive the configured points for every Facebook share they perform.
Like Us on Facebook	Increase your business’ social ranking.	The loyalty participant will receive the configured points if they "like" the defined page on Facebook.
Follow Us on Instagram		The loyalty participant will receive the configured points if they start following the defined page on Instagram.
Follow Us on LinkedIn		The loyalty participant will receive the configured points if they start following the defined page on LinkedIn.
Follow Us on Twitter		The loyalty participant will receive the configured points if they start following the defined page on Twitter.
Subscribe to Us on YouTube	Increase your business’ social ranking	The loyalty participant will receive the configured points if they subscribe to the defined channel on YouTube.
Custom Task (Only available for custom -built websites)	Create custom tasks as per your business needs.	The loyalty participant will receive the configured points when the defined task action is completed.

To add any of the above tasks to your program:

1. Go to **Program -> Loyalty -> Points.**
2. Click **Add Task.**



3. **Pick a task** from the list.



4. Complete the below configurations:

    a. **Task Label**: The name with which the task will be displayed on Thrive's system and the widget. You can continue with the default label or change it according to your liking.

    b. **Unique ID** (Only for Custom Task): An ID that will be used to identify the task and track its progress.

    c. **Points:** Number of points the loyalty participant will receive, on successful completion of the task (or for every amount they spend/initiate).

d. **Task Availability:** To limit the task's availability to a specific date frame. Choose the time frame for which the task will be available from the date picker.

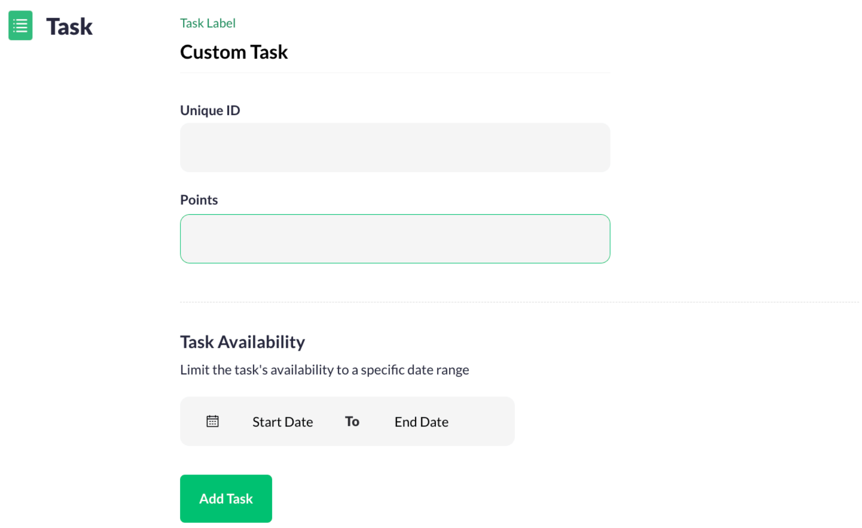
i. Conditions:

- You can have two tasks of the same type in the program, at the same time, provided one task is limited to a specific date range and the other has no task availability set.
- If you want to have multiple tasks of the same type, you can add the task with a date availability that does not collide with the already set task's date range.

Ex: Task A's availability is from 4/13/2023 to 4/28/2023, then you can set Task B's availability anytime before 4/13/2023 or after 4/28/2023.

ⓘ If you already have the same task added to your program, the task with the highest priority will be displayed at the top of the widget. Taking the example above, Task A will be displayed at the top provided Task B is set after 4/28/2023. If it's set before 4/13/2023, then Task B will be displayed at the top. If there's a task of the same type without any date availability, that will be given low display priority due to its extensive time frame.

5. When you're finished making the above configurations, click **Add Task.**



Referral Tasks (Refer a Friend and Referral Purchase) made via a browser that has extensions like uBlock Origin that are designed to block third-party cookies, a browser that has any other configurations set up to avoid third-party cookie tracking, or incognito mode will be considered an individual signup (direct customer) and purchase respectively.

Social tasks (Facebook Share, Twitter Share, Follow us on LinkedIn, Follow us on Twitter, Follow us on Instagram, and Like us on Facebook, Subscribe to Us on YouTube) work based on the honor system. Loyalty participants receive the configured points instantly after clicking the respective action buttons, instead of upon completion of an action. This is because websites such as Facebook, Twitter, LinkedIn, YouTube and Instagram prohibit third-party programs from receiving information from their platforms. Therefore, kindly ensure the points you configure fit your company's standards.

Keep social tasks low on your priority list. Use them as booster tasks that encourage loyalty participants to perform additional tasks.

The process of rewarding points in referral tasks (Referral Purchase and Refer a Friend) can be altered using attribution settings.

With the points accumulated from completing the above tasks, loyalty participants can redeem them in the form of:

1. Coupons (available only for Zoho Commerce, Shopify, and Wix based brands)

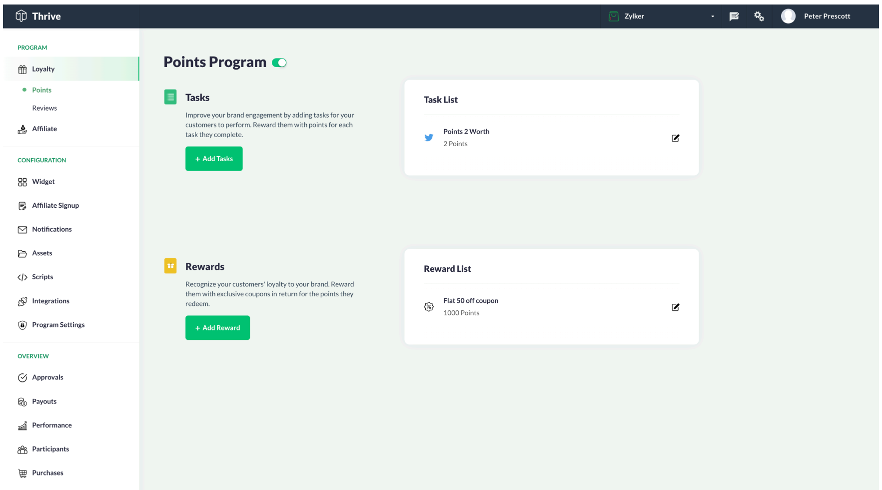
Below are the types of coupons available to add to your program:

Coupon Name	How it works
Coupon	Generates a unique code on every redemption that can be applied to your entire inventory.
Product Coupon	Generates a unique code on every redemption that can be applied only to the defined product.
Collection Coupon	Generates a unique code on every redemption that can be applied only to the defined collection.

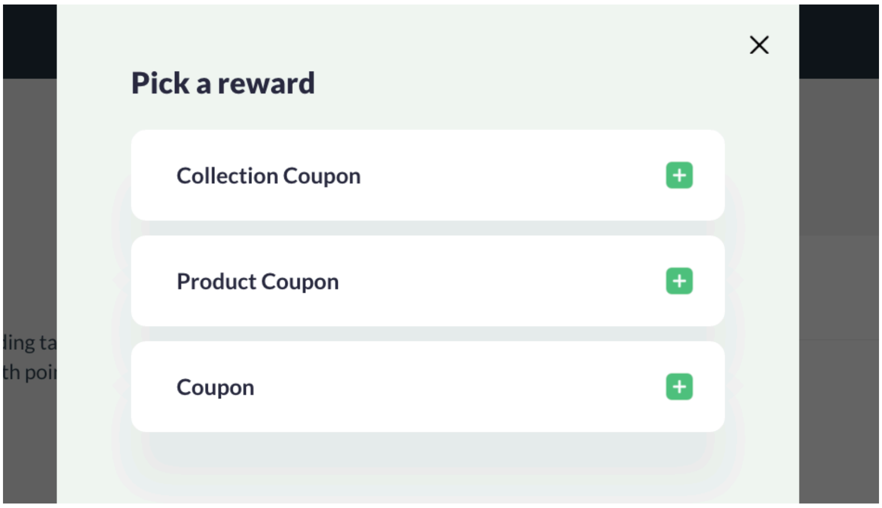
> *Product* and *Collection* coupons are only available for **Advanced** and **Professional** plan users. If you're on a **free-trial** or **Starter** plan and plan to upgrade, you must manually sync the store details again with Thrive to make them available for use. To do so:
>
> 1. Go to **General Settings**.
> 2. Click **Brands**.
> 3. Pick the store you've upgraded.
> 4. Click the respective sync button.

To add any of the coupons above:

1. Go to **Program** -> **Loyalty** -> **Points.**
2. Click **Add Reward.**



3. **Pick a coupon** from the list.



4. Complete the below configurations:

   i. **Reward Label**: The name of the reward to be displayed on Thrive's system and on the loyalty participant's widget. You can continue with the default label or change it to your liking.

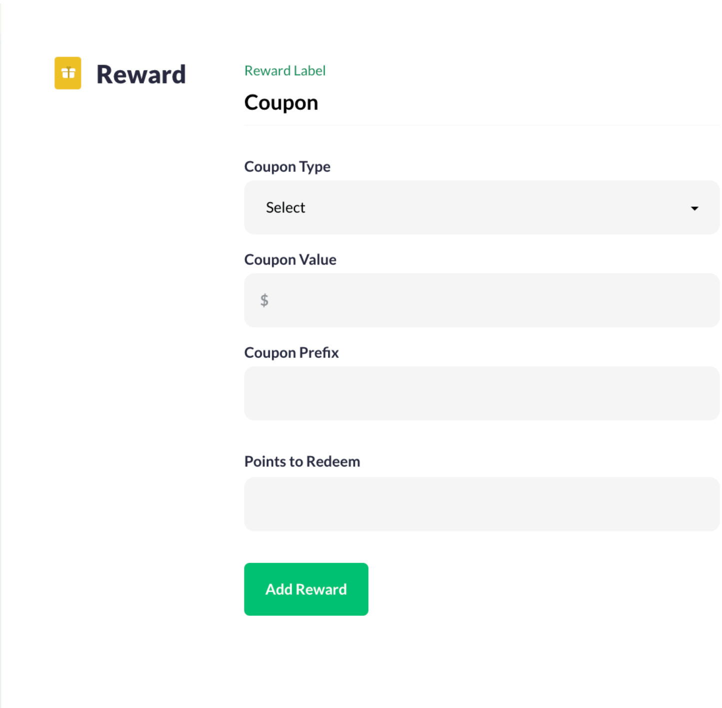
ii. **Coupon Type:** Coupons can be either a percentage or fixed amount coupon. Here, you can choose which type you want to use.

iii. **Coupon Value:** This is the face value of the coupon. Enter in the value here.

iv. **Coupon Prefix:** This is a code you can have at the beginning of every generated unique coupon code to use for your reference during performance analysis.

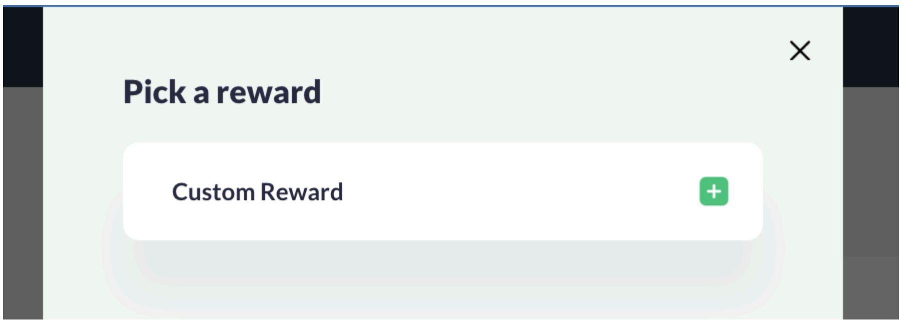
v. **Points to Redeem** - These are the points required to redeem that particular coupon.

5. Once done, click **Add Task.**



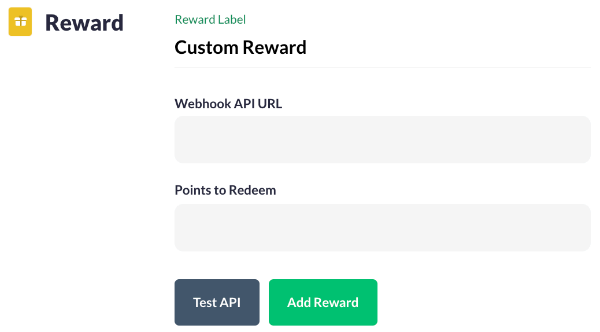
2. Custom Reward (available only for custom-built websites)

To cater to different reward requirements, you can customize the rewards you offer using webhooks by following the steps below.



1. Instead of the coupon configurations above, you'll need to define a webhook for the custom reward you wish to provide and create an API URL for it.
2. Copy and paste it into the **Webhook API URL** field and test the API to ensure it is working.
3. Once done, provide the **Points to Redeem.**

4. Click **Add Reward**.



Reviews Program

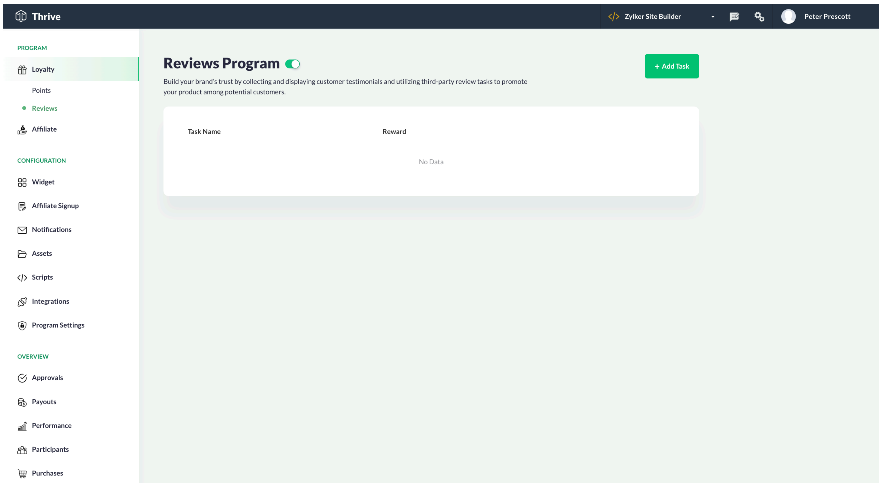
The reviews program includes tasks that focus more on customer experience discovery and using it to advocate, rather than engagement. The following review tasks are available in Zoho Thrive:

Task name	Goal	How it works
Customer Testimonial	Collect success stories and use them to bring new customers to your store.	The loyalty participant will receive the configured points in return for their testimonial.
Third-Party Review (GetApp, ProductHunt, Trustpilot, Capterra)	Motivate loyalty participants to review your business on third-party sites, increasing brand reach.	Loyalty participants will receive the configured points after submitting the review URL received from the review site after verification of the review written.
Review on Google	Motivate loyalty participants to review your business on Google, increasing brand credibility.	Loyalty participants will receive the configured points after submitting the review URL received from the Google after successful submission.

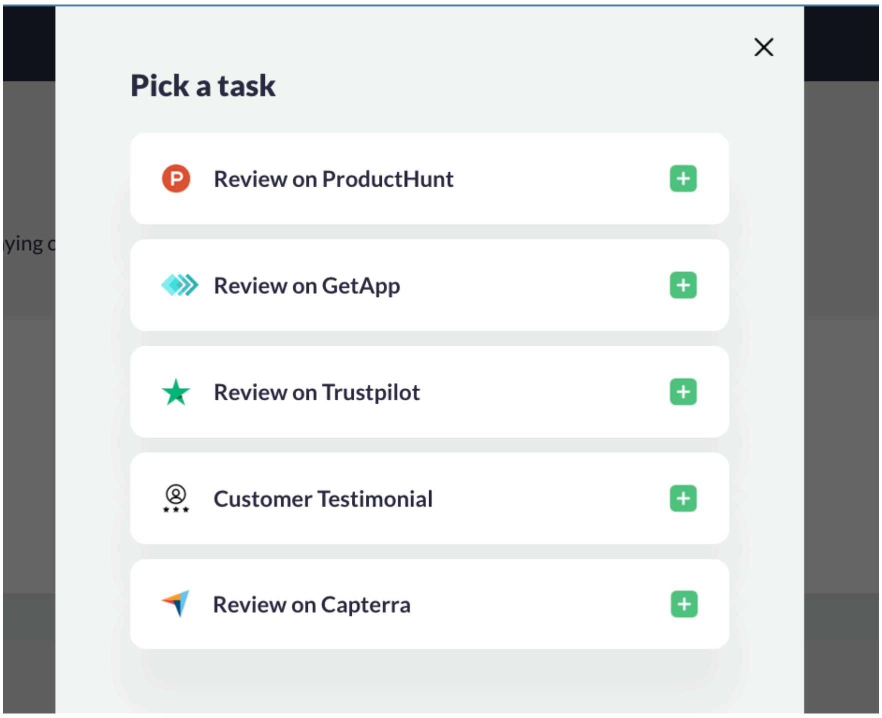
To add the above tasks to your program:

1. Go to **Program** -> **Loyalty** -> **Reviews.**

2. Click **Add Task.**

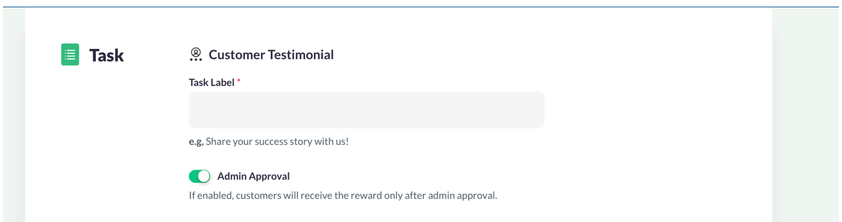


3. Pick a task from the list.

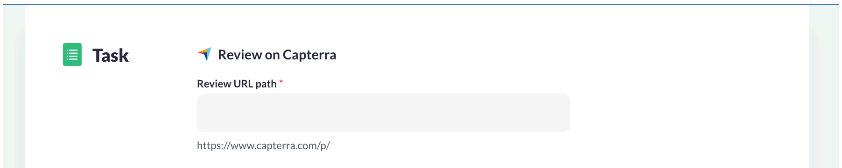


4. Complete the below configurations:

   a. **Task Label** (only for Customer Testimonial): The subject that will be displayed on the widget when the participant clicks the task's name.



b. **Review URL Path** (only for Review Tasks): The portion of the URL that identifies your business on the specified platform.

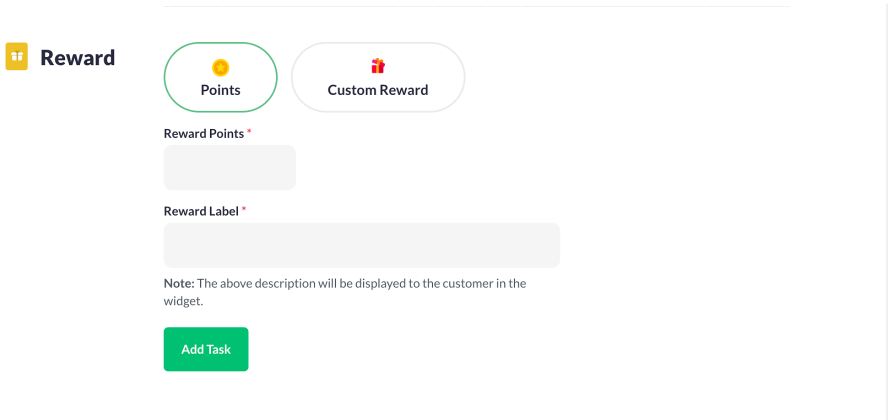


c. **Admin Approval:** This gives you control over the tasks.

As mentioned above, these tasks are reward-specific; you can choose between points and the custom reward option.

To reward points**:**

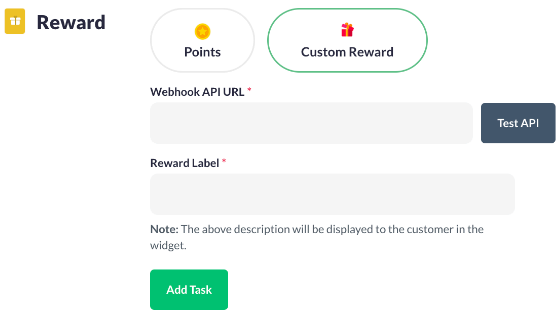
In the *Reward Points* field, enter the number of points the loyalty participant will receive upon successful completion of the task.



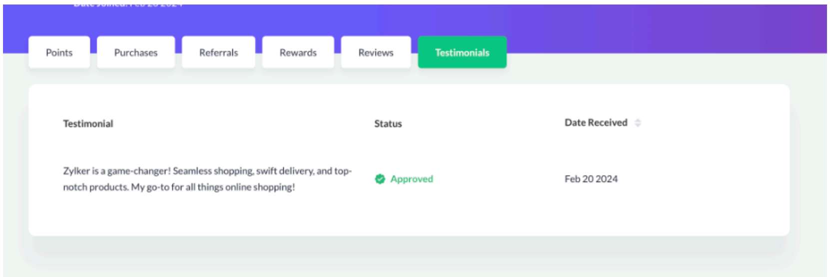
For custom rewards**:**

1. Define a webhook for the custom reward you wish to provide and create an API URL for it.
2. Paste it into the **Webhook API URL** field and test the API to ensure it is working.
    a. **Reward Label**: The name of the reward to be displayed on Thrive's system and the widget.

3. Once done, click **Add Reward.**



After successful completion, the testimonials and reviews will appear in the **Details** section of the respective loyalty participant.



VIP Program

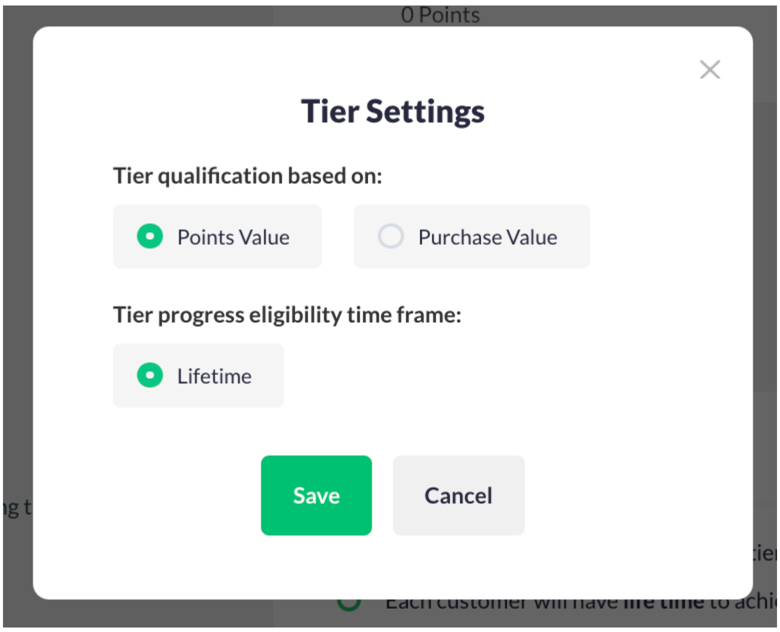
VIP programs, most-commonly called tier-based programs, are the most efficient way to increase your customers' engagement and make them stay with your brand. You can have multiple tiers in a program, with each tier having its own benefits. As tier levels rise, benefits and eligibility requirements must also increase, so that the customer works harder to reach the highest tier with the best benefits. Here, you will find all the details required to build and manage a VIP program in Zoho Thrive.

Steps to build a VIP Program:

Tier Configuration Settings

Before you create the tiers, you need to decide on the tier's configuration. To do so,

1. Click **Loyalty** and select **VIP**.
2. You will find the default configuration under the **Tier Configuration** section. *If you don't want to modify it, you can proceed with the tier creation.* Otherwise:
3. Click **Edit** and make the changes.
4. Click **Save**
   .



- **Tier qualification based on** - The tier type based on which your customers will progress through the tiers.
- **Tier progress eligibility time frame** - Overall time period your customers have in order to move up / stay in a VIP tier.

You will not be able to modify your tier program's configuration once the program is live. If necessary, you will have to pause the program to make any changes. Read below for the steps to make any changes.

Tier Creation

After the tier configuration, you can start creating the tiers for your program.

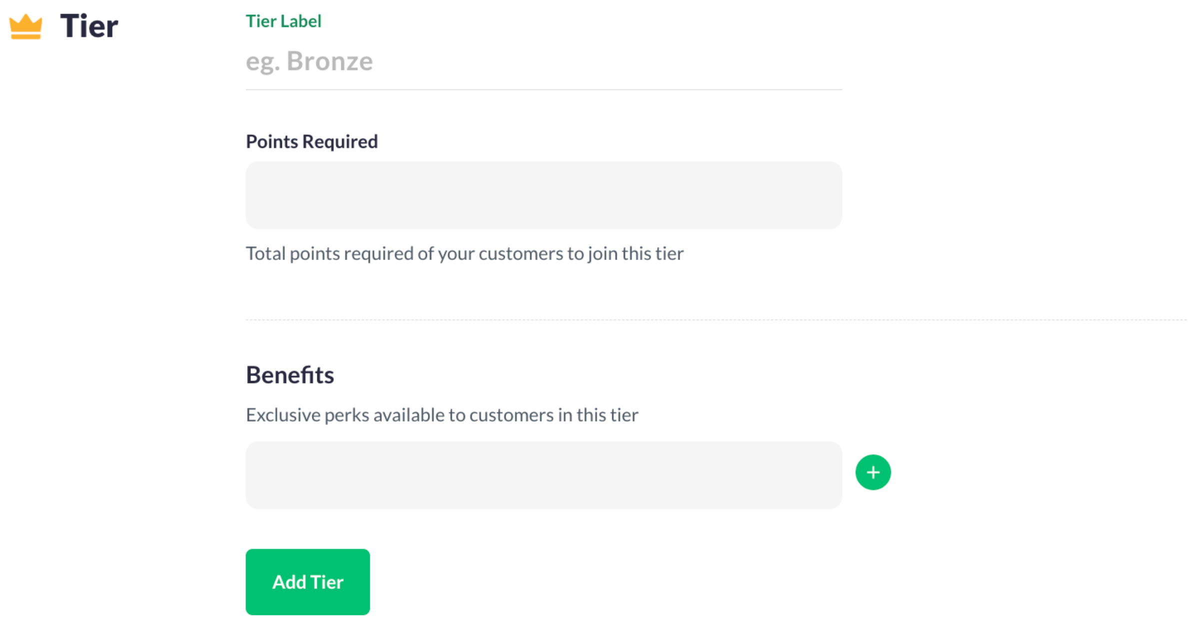
Every program comes with a default listed base tier whose *Points / Purchase Amount Required* will stay non-editable as "0". However, you'll still be able to edit the other sections of the task. Once the program is taken live, all your customers will become a part of this base tier.

1. Under **VIP Tiers**, click **+ Add Tier**
2. In the pop-up, provide the following:
   - **Tier Label** - The label with which your tier will be displayed to the customers inside the widget.
   - **Points / Purchase Amount Required**- Total points/amount required of your customers to become a part of this tier.

Total points/amount denotes the overall points/amount earned by the customer since the program is made live. It also includes the points deducted due to reward redemption or manual adjustments.

   - **Benefits -** The perks your customer will receive while being in this tier. You can add multiple benefits by clicking the **+** button.

3. Once the tier details are entered, click **Add Tier**.



This way, you can create multiple tiers with different *Points / Purchase Amount Required* for your program.

Task Addition

Adding tasks for your customers to complete is very important to enable progress through the tiers. You can either simply add tasks from the reviews program the regular way, or allocate points-based tasks specifically for each tier by following the steps below.

- Tasks added to a specific tier will only be visible to customers who are part of that tier.
- Every task in a tier must be unique. No two tasks should have a similar configuration.
- The Become a Member task cannot be added to any tier.
- You can only add the tasks one by one for each tier. To avoid any confusion, we recommend you to go about one tier at a time.

To add point-based tasks:

1. Click **Points** under **Loyalty.**
2. Under **Tasks**, click **+ Add Task.**
3. Pick the first task that you want to add to the tier.
4. Fill in the basic task details.
5. In the **VIP Tier** section, select the tier to which you would like to add the task.
6. Click **Add Task.**

Likewise, you can add the tasks for the other tiers. After all the planned tasks are added, you are set to go live. In order to enable the VIP program it is mandatory that the program chosen for task purpose must be enabled too. Based on the program choice made above:

1. Enable the respective program's toggle.

2. Return to the VIP page.

3. Enable the VIP toggle.

Updating a VIP program after it's live:

Making changes to a VIP program comes with a few restrictions and steps to be followed. Whenever there's a change made, the customer - tier segregation will begin again based on the change made and the current status of your customer's progress.

Tier Configuration modification:

1. Pause the VIP program by disabling the program's toggle

2. Make the changes by clicking **Edit** in the **Tier Configuration** section.

3. Click **Save**.

Tier Modifications:

To modify your tier, you don't have to pause the program. Simply:

1. Click the ***Edit button*** visible on the tier that you want to modify.

2. Update the tier.

3. Click **Add Tier**.

Similarly, to delete a tier, click the **Delete** button visible on the tier that you want to delete.

> ⓘ When you delete a tier, all its tasks will be removed and the customers who were a part of that tier will step down to the next tier.