2012

Reports Guideline

How to access Reports for KPI's

This report is not intended to be complete and is a working document. It is the property of Customer Connect Loyalty Ltd and is for Clients of CCL only.

Emma Crabtree Customer Connect Loyalty Ltd 11/14/2012



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Reports Guidelines

This is the beginning of a detail guideline for reports. We will add to this as we move along and any suggestions you can make are always welcome. It is in no way intended to be complete.

Missing Customers

We have built this into one report and its at the top if the Report Screen . To get to the reports screen please click on the small icon at the bottom of our Front Desk Screen





Once You are in the Back office area please click on the Reports Module Button

When you go into the reports Module you can see the top report Titles Atrition306090

Double click on this to open it. Remember that **This report will be empty if your system was** upgraded in October as **30** days wont have passed yet

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Below you can see what the report will look like when opened

- 1. Click these arrow buttons to scroll through the list
- 2. Click on this disc to export the data see below for more instructions

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After the export disc is clicked the above Tile will appear

1, is where the export will be saved to on your PC

2, This is where you can name your file, Its best to name it say XYZ Butchers Attrition Report 14th Nov.

2012. This way you can find it and save all you data in a logical well named order

3, PLEASE clicl this drop down arrow and select Excel as the format for saving your file other wise it will be unreadable.

4, once you have all of the above completed then click this save button.

Summary by Store Points Redeemed And Claimed

There are two reports that will help you in this regard.

- 1, Summary by Store
- 2, Summary by Store Last 8 Weeks

		AVAILABLE REPORTS MEMBERSHIP		
	NAME	DESCRIPTION	LAST RUN DATE	
NC	Contact List Detail	Details about participation in Email, SMS and Postal marketing		
	Customer Extended Detail	Extended Detail Data (detail entry form)	03-Oct-2012	Categories
	Enrollment Data Entry Audit	Hilights missing data elements for enrollment records		
	Enrollment Listing	Enrollment Listing, by Period		ALL REPORTS
	Enrollment Listing Extended	Enrollment Listing (Extended Version)	23-Oct-2012	
	Enrollment Renewal Listing	Audit Membership Renewals		EMAIL
	Enrollments Online	Enrollments which occur from Web (MyRewards)		
	Member Activity Audit	Audits Member Account Activity		
O	Member Activity Summary	Enrollment listing, in card# order, one member per line. / 2	Re-	
	Member Expiration Forecast	Lists loyalty accounts expiring in specified period.		
Ð	Member Statistics by Store	Summary by store of points issued, claimed and member visits	03-Oct-2012	GIFT CARD
Ŏ	Membership	Active Memberships (not expired)		
Õ	Postal Address Invalid List	Listing of accounts with Postal Address flagged INVALID		
	Referral Listing	Member Referrals - Detail Version		Кіозк
	Referral Summary	Member Referrals - Summary Version	52	
0	SMS Text InBound	Listing of Inbound SMS Text Messages		
	Spending Account Activity	Activity for Loyalty Spending Accounts		OVERVIEW AND STATS
	Spending Summary	Status of Loyalty Spending Accounts - Summary Version		
Đ	Store Summary	Summary of enrollments, visits and points (last week, last 8wks, ytd)	01-Oct-2012	PACRAGE
G	Top Members Report (RFM)	List top members according to RFM rank		
		3		
				- Over reserve
	Report Data Extraction Available	le Deport Data Extraction Scheduled		

- 1. Click on Membership Category on the right hand side
- 2. Select the report you need in this case Summary By Store of points issued , claimed and members visits.
- 3. This report is the same as above but covers the last 8 weeks

Below we click on the report numbered 2 above.. Summary by Store of Points Issued, claimed and member visits.

					TS		
0	NAME Contact List	Detail	DESCRIPTION	ail, SMS and Pos	tal marketing	3631	LAST RUN DATE
0	Customer E	xtended Detail	Extended Detail Data (detail entry	form)	a manoung		03-Oct-2012
0	Enrollment D	Data Entry Audit	Hilights missing data elements fo	or enrollment red	cords		
<u>s - 3</u>	Enrollment	istina	Enrollment Listing by Period				
	Enrollment	Report Filters					
00 000 00	Enrollment Enrollment Enrollment Member Act Member Act Member St Membershi Postal Addr Referral Lis Referral Su Sms Text In Spending A Store Sumr		Report C	Criteria and	Filters 14-Oct-2012 13-Nov-2012		
)						ОК	Cancel
-							

The date parameters are offered and we need to choose the dates preferred.



Above is the report as it will appear on screen.

- 1. This is the store name so if you have more than one store they will be listed here
- 2. Points Earned, this is net of points redeemed ie points earned and points redeemed added together will give you total points issued.
- 3. Member Visits, this is how many times cards were swiped in the period.
- 4. New enrolments
- 5. Points redeemed or claimed

Loyalty Sales

To see how much loyalty related sales i.e. the actual sales that points were issued on please go to the categories section on the right hand side of your Reports screen

V				
		SALES		
	NAME	DESCRIPTION	LAST RUN DATE	
* - 1	Fundraiser Transaction Detail	Shows each member's transaction detail against fundraisers	3	
	Gift Card Sales	Gift Card Sales, Donations and Credits		Categories
	Sales Activity	Sales Activity shown by Month	13-Nov-201	2
	Sales By Cashier	Sales Activity shown by Cashier, by Month		ALL REPORTS
	Sales By Company	Sales Activity Detail for Company	13-Nov-201	2
	Sales By Reference	Sales Activity Organized by Reference Input		
.	Sales By Segment	Sales by Customer Category		C Europuntar
	Sales By Station, Cashier	Sales Activity shown by Staton, Cashier, Month		ENROCOMENT
	Spending Account Funding	Funding Report for Loyalty Spending Accounts		
				0
				GIFT CARD
				Meunopaun
				MEMBERSHIP
				OVERVIEW AND STATS
		4		SALER
				- United
				SPENDING ACCOUNT
				User Add-Ins
(Beport Data Extraction Available	Q Report Data Extraction Scheduled		

- 1. Click the Sales Button on the right hand Side
- 2. Select the relevant Report, in this case Sales Activity by Month

Below you can see the totals for the above report. These totals are at the end of the report which you can go to by clicking on the forward arrow heads at the top of any report

		1			'5		Repo	Sales A Report Date: 1 ort Period: 2012-10-14 TO 20
DATE	ТҮРЕ	GROSS SALE	NET SALE	POINT S ISSUED	TRAN NO.	REFERENCE NO.	CARD NUMBER	TRANSACTION DETAILS
0/15 13:09	P	€0.35	€0.35	0.00	960731		338066874227	
0/15 13:07	P	€10.11	€10.11	10.00	960725		464402103437	
0/15 12:58	P	€3.00	€3.00	3.00	960703		301200000110	
0/15 12:57	P	€10.00	€10.00	10.00	960698		301200000204	
0/15 12:14	P	€2.18	€2.18	2.00	960594		227329504866	
0/15 12:05	P	€5.40	€5.40	5.00	960571		645686370841	
0/15 11:56	P	€13.61	€13.61	14.00	960548		662041203981	
0/15 11:43	P	€9.39	€9.39	9.00	960532		127247646053	
0/15 11:27	P	€3.47	€3.47	3.00	960498		959881471362	
0/15 11:16	P	€11.36	€11.36	11.00	960467		538095137866	
0/15 11:12	P	€11.94	€11.94	12.00	960453		30120000121	
0/15 10:54	P	€3.50	€3.50	4.00	960429		30120000165	
0/15 10:46	P	€9.90	€9.90	10.00	960416		922833144758	
0/15 10:36	P	€5.40	€5.40	5.00	960396		934316973364	
0/15 10:25	P	€8.74	€8.74	9.00	960373		854267626826	
0/15 9:42	P	€28.98	€28.98	29.00	960325		611341544347	
October - 20	12	€21,428.71	€21,428.71	21,435.00				
STORE TOT	ALS	€34,756.83	€178.00	178.00				
SRAND TOTA	AL S	€178.00	€34,756.83	178.00				
GRAND TOTA	AL S	€34,/96.83 €178.00	€178.00 €34,756.83	178.00 178.00				

Calculating Figures From the Reports

Lets take a look at how we can calculate figures from the reports.

- 1. Average Spend
 - a. Divide Sales for the month in the above report by Member visits and this will give you average loyalty visitor spend.

2. Average Visit Per Customer

- a. Divide total visits by total Membership
- 3. Loyalty Yield What's Yours....?
- Only from Customer Connect Loyalty ! We have started to use a measurement which we have devised for our Butcher clients it's called Loyalty yield. Its calculated by Yield. The yield is taken as a percentage of the maximum achievable turnover. Maximum achievable turnover is based on 80% of the registered members of a loyalty scheme shopping 3 times in a month using the average spend of that store. For example a store has 1500 members with an average loyalty member spend of €17 per visit . Max revenue = 1200 (80% of 1500) * 3 (visits) * €17 = €61200

- Now that you have €61,200 as the maximum revenue achievable then you calculate (by using the CMS panel and location activity Snapshot) your loyalty revenue as a percentage of the max revenue. E.g. loyalty turnover for October say 33,000 therefore your yield is 53.9%
- 3. Yield is a good measure because it's a combination of visits and average spend so it gives a real reflection of how effective any growth is

Return on Offers On The Loyalty Platform

When you are running automated offers on the platform you can measure the return you are getting from these below

		AVAILABLE REPORTS PROMOTION		
NAM	E	DESCRIPTION	AST RUN	
Com	plaint Detail	Detail listing of complaint activity by patron		
Com	plaint Summary	Summary of complaint activity by patron		Categories
Fund	raiser Account Review	Shows all defined fundraiser accounts with cumulative activity		
E Fund	raiser Contribution Detail	Shows each member's contribution to their chosen fundraiser account		ALL REPORTS
🕒 Fund	raiser Summary	Summary of Fundraiser Activity		
🕒 Fund	raiser Transaction Detail	Shows each member's transaction detail against fundraisers		
Loyal	ty Point Invoicing	Multi-Store Invoice Generation for Reconciling Point Redemptions		
Prom	otion Detail	Promotion Effectiveness, by Run		
Prom	lotion Summary	Summarizes effectiveness of your marketing campaign	01-Oct-2012	
Rede	mption Listing	Redemption Detail by Month		
Rede	emption Listing by Cashie	Redemption Detail by Cashier		GIFT CARD
Rede	emption Summary	Redemption Summary by Month		
Refe	rral Listing	Member Referrals - Detail Version		
Refe	rral Summary	Member Referrals - Summary Version 2		
	Text InBound	Listing of Inbound SMS Text Messages		
				OVERVIEW AND STATS
				O Proving
	3	×		PACAGE
	•	· · · · · · · · · · · · · · · · · · ·		
			100	
				SALES
				SPENDING ACCOUNT
				USER ADD-INS

- 1. Click on Promotions Category
- 2. Select Summarises the effectiveness Of Your Marketing campaign

Guest Loyalty Club

Promotion Summary Report 13/01/2011 TO 14/03/2012

PROMOTION	TOTAL OFFERS ISSUED	TOTAL	TOTAL OFFERS REDEEME	TOTAL Spent	EFFECTIVENESS
Birthday					
Birthdays	1,452	1,275	177	€11,156.07	12.10%
	1,452	1,275	177	€11,156.07	12.10%
Anniversay					
Anniversaries	944	724	220	€6,930.68	23.30%
	944	724	220	€6,930.68	23.30%
Appreciation					
Best Member	170	120	50	€671.64	28.20%
	170	120	50	€671.64	28.20%
Miss You					
Miss You	197	195	2	€190.00	1.02%
	197	195	2	€190.00	1.02%
New Member					
New Member	874	720	154	€4,991.23	17.2
	874	720	154	€4,991.23	17.2
Raffle					
Raffle	3	2	1	€0.00	33.33%
	3	2	1	€0.00	33.33%
TOTAL CAMPAIGN	3,637	3,034	600	€23,939.62	

Above is a Report of Offers redeemed on the loyalty platform, we can see here that in the top line for example there were 1452 birthday offers issued, 177 of these offers were redeemed and when the customers redeemed these offers they spent €11,156.07 in the process.

Montitoring and Measuring Redemptions

Below we can see the redemptions for a certain period (the dates you require are prompted for by the platform when you select the report)



Customers With Missing Data

If you find that you are missing data on Customers such as email addresses for example you can easily print a report in card number order to review this.

P 25				
	States.	MEMBERSHIP		
NAME		DESCRIPTION	LAST RUN DATE	
Contact List Det	ail	Details about participation in Email, SMS and Postal marketing		
Customer Exten	ded Detail	Extended Detail Data (detail entry form)	03-Oct-2012	Categories
Enrollment Data	Entry Audit	Hilights missing data elements for enrollment records		
Enrollment Listin	g	Enrollment Listing, by Period		ALL REPORTS
Enrollment Listin	g Extended	Enrollment Listing (Extended Version)	23-Oct-2012	
Enrollment Rene	wal Listing	Audit Membership Renewals	2	
Enrollments Onl	ne	Enrollments which occur from Web (MyRewards)	4	
Member Activity A	udit	Audits Member Account Activity	13-Nov-2012	LINGLMENT
Member Activity S	ummary	Enrollment listing, in card# order, one member per line.	13-Nov-2012	
Member Expirati	on Forecast	Lists loyalty accounts expiring in specified period.		
Member Statistic	s by Store	Summary by store of points issued, claimed and member visits	13-Nov-2012	GIFT CARD
Membership		Active Memberships (not expired)	13-Nov-2012	
Postal Address I	nvalid List	Listing of accounts with Postal Address flagged INVALID	_1	
Referral Listing		Member Referrals - Detail Version	-	О Кіозк
Referral Summa	ry	Member Referrals - Summary Version		Managana
SMS Text InBour	d	Listing of Inbound SMS Text Messages		MEMBERSHIP
Spending Accou	nt Activity	Activity for Loyalty Spending Accounts		OVERVIEW AND STATS
Spending Sumn	iary	Status of Loyalty Spending Accounts - Summary Version		-
C Store Summary		Summary of enrollments, visits and points (last week, last 8wks, ytd)	13-Nov-2012	
Top Members R	eport (RFM)	List top members according to RFM ranking	13-Nov-2012	
80				SALES
				SPENDING ACCOUNT

- 1. Select membership from the category section on the right hand side
- 2. Select the Highlights Missing Elements report

🍟 Cu	sta	omer conne c	đ	Repor	rts		Talbot Street
					RTS		
9		NAME		DESCRIPTION		LAST RUN DATE	
ð.	O	Contact List Detail		Details about participation in Email, SMS and P	ostal marketing		
49E	Θ	Customer Extende	d Detail	Extended Detail Data (detail entry form)		03-Oct-2012	Categories
	_	Enrollment Data E	ntry Audit	Hilights missing data elements for enrollment	records		
	1	Enrollment Report	rt Filters	Construction and the Property			ALL REPORTS
	1	Enrollment		Report Criteria ar	nd Filters		
E +	A	Enrollments Member Act					
1 and	O	Member Act Sta	an Date		15-Oct-2012		
	0	Member Ex En	id Date		14-Nov-2012	19. 20. 19 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	GIFT CARD
	Ð	Membershi Inc	lude		ACTIVE members only		
	Õ	Postal Addr					
	1	Referral Lis					Kiosk
1252		Referral Su				88.2.39 G.S.	
	O	SMS Text In					OVERNEW AND STATE
		Spending S					
36.36	O	Store Sumr					PACKAGE
	Θ	Top Membe					
	1						SALES
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	1						USER ADD-INS
	1						
0/22/01							
		🕑 Report Data Extra	action Available	e 🕗 Report Data Extraction Scheduled	States and the states		
Start	6	6 ?				1.50 H.S. 48	

1. Above Set the required Date parameters for your report then select OK

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	Privilege Ro Talbot St	ewards reet	Enrollment Data E	ntry A
ENROLI MENTS ENTE	RED BY ADMIN		-	
ACTIVE MEMBERS				
Holder:	#31020000038	ph: ph: fx:	Join: 15-Oct-12 Expiry: Gender:	BDay:
Co:	Street:	CSZ: ,	Email:	Mail Lis
Holder:	#108810250404	ph: ph: bc	Join: 15-Oct-12 Expiry: Gender:	BDay:
Co:	Street:	CSZ: ,	Email:	Mail Lis
Holder:	#305049790057	ph: ph: fx:	Join: 15-Oct-12 Expiry: Gender:	BDay:
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Co:	Street:	CSZ: ,	Email:	Mail Lis
Holder:	#305049780574	ph: ph: fc:	Join: 15-Oct-12 Expiry: Gender:	BDay:
Co:	Street:	CSZ: ,	Email:	Mail Lis
Holder: Phil Brennon	#301200000201	ph: 018 ph: 018 fx: 018	Join: 15-Oct-12 Expiry: Gender:	BDay: 6
Co:	Street: 6 FoleyApartments	CSZ:,Dublin 1	Email: irishqualitydecor@gmail.com	Mail Lis
Holder: Thomas Burke	#889608132801	ph:018853553 ph: 018 fx: 018	Join: 15-Oct-12 Expiry: Gender:	BDay: 3
	Street:	CSZ:,	Email:	Mail Lis
Holder: Mary Byrne	#301200000534	ph: 018 ph: 018 fx: 018	Join: 15-Oct-12 Expiry: Gender:	BDay: 4
Co:	Street: Apt 49 The Strand	CSZ:,Dublin 3	Email: byrne700@gmail.com	Mail Lis
Holder: Chris Collins	#31020000381	ph: 018 ph: 018 fx: 018	Join:15-Oct-12 <mark>Expiry:</mark> Gender:	BDay: 4
Co:	Street: 90 Crosbles Yard	CSZ:OssaryRoad,Dublin 3	Email:collinch@tcd.ie	Mail Lis
Holder: David Deering	#301200000052	ph: 018 ph: 018 fx: 018	Join: 15-Oct-12 Expiry: Gender:	BDay: 11
Co:	Street: Apt 4	CSZ: 39 Summer Street North, Dublin 1	Email: daviddeering 1984@ hotmail.c	om Mail Lis
Holder: Samantha Donegan	#171884847407	ph: 018 ph: 018 fx: 018	Join: 15-Oct-12 Expiry: Gender:	BDay: 8
Co:	Street: 4c Liberty House	CSZ:,Dublin 1	Email: samdonegan@live.co.uk	Mail Lis
Holder Martin Eustace	#399928075238	ph: 018 ph: 018 fr: 018	Inin: 15-Oct-12 Explor Gender:	BDay 2
Co:	Street: Apt 12 Blackrock House	CSZ: 28 Newtown Ave, Dublin	Email:	Mail Lin
Holder: Pyhllis F	#30120000301	ph: 018 ph: 018 fx: 018	Join: 15-Oct-12 Expiry: Gender:	BDay:

Above you can see the report to like all reports to make best use of it its better to export it to Excel as we have shown with other reports by selecting the Disc as shown by the green arrow above. Don't forget to save the file as an excel otherwise it will be unreadable.