



Version 1

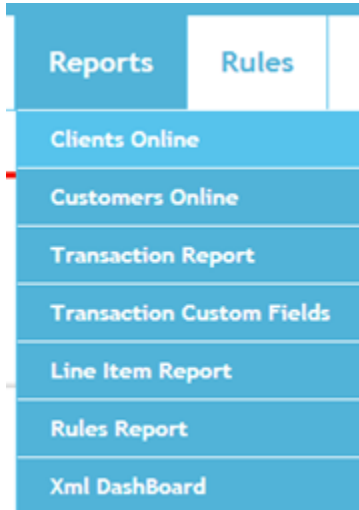
Admin Area - Navigating The Reports Tab

THE LOYALTY BOX is a combination of world-class technology, backed by a professional support team ensuring that your program is a success.

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Below is a screenshot of all the reports available to you. Each will be explained in this guide.



1. Clients Online (Location Report)

On this report you can see what is happening at every location

- Location name: which location the transactions are happening at.
- Transaction Type: did they do a balance enquiry; enrol a new client or a gift issuance etc.
- Transaction shows how many times a specific transaction type has been performed.

Location Transactions

Date From:
Enter the from date

Date To:
Enter the to date

Show Export

LOCATION NAME	TRANSACTION TYPE	TRANSACTION
The Boutique - Cape Town	Balance Inquiry	1
The Boutique - Cape Town	Enrollment	5
The Boutique - Cape Town	Gift Issuance	2

2. Customers Online

This shows which customers have been in your store on a specific day, there might be 2 or more lines per customers, it just depends on how many transactions were done per customer eg. If you did an Enrolment, gift issuance, balance enquiry the customer would show up three times, you can also narrow it down to certain dates if you wish.

Customers Online

Date From:
Enter the from date

Date To:
Enter the to date

Show

CARDNUMBER	PROGRAM	CARD SET	FIRSTNAME	LAST NAME	PHONE NUMBER	LAST TRANSACTION
95754835222614	The Boutique Loyalty Program	The Boutique Loyalty Program	Lee	Wilson	27836489587	2013/05/10 09:30:45
95754835222614	The Boutique Loyalty Program	The Boutique Loyalty Program	Lee	Wilson	27836489587	2013/05/10 09:31:21

3. Transaction Report

This is the report looked at most often, it shows you the type of transactions done, if a transaction was successful or failed you can pick it up here in transaction status, it tells you the time the transaction among other important transaction details which you can see below.

Transactions between 2013/05/10 and 2013/05/10

CARD ID	TRANSACTION ID	LOCATION ID	SOURCE	CELL NUMBER	EMAIL ADDRESS	ERROR	TYPE	AMOUNT	VOUCHER	TRANSACTION STATUS	PROCESSED TIME
98024141132509	53806	The Boutique - Johannesburg (362769)	Web Terminal	27836578697			Balance Inquiry		False	Transaction Approved	2013-05-11:39:01
98024141132509	53801	The Boutique - Johannesburg (362769)	Web Terminal	27836578697			Enrollment	1,0000	False	Transaction Approved	2013-05-11:38:49
99374545404082	53329	The Boutique - Cape Town (948735)	Web Terminal	27846785297			Gift Issuance	R ± 500,00	False	Transaction Approved	2013-05-09:59:16
99374545404082	53327	The Boutique - Cape Town (948735)	Web Terminal	27846785297			Balance Inquiry		False	Transaction Approved	2013-05-09:58:15

4. Transaction custom fields

If you chose to create custom fields you can see the details here, eg you created a custom field asking a customer their favourite colour you would be able to see the answers for each customer in this report

Show

Export

TRANSACTIONID	PROGRAMNAME	CARDSETNAME	CODE	ANSWER	DATEADDED
54129	The Boutique Loyalty Program	The Boutique Loyalty Program	What is your favourite colour?	Blue	2013/05/10 01:09:17 PM

5. Line Item Report

This report can be seen if your Loyalty Box is integrated into your point of sale. You are able to see which line items the loyalty customer purchased during their sale

6. Rules Report

In This report you can see if your rules are firing successfully, if they are not then you know there is something wrong, if you have more than one rule you can see which rule was run under the rule column. You can also see which location it was run at among other useful information as seen below.

Show Export

Rules

Rules Run: 3

CARD ID	PROGRAMME	CARD SET	LOCATION	RULE	TRANSACTION ID	SKU	PROCESSED TIME
997456334816451	Candice's Store	Candice's Store Cards	Candice's Store (424411)	1% Cash Back	51214	0	2013-05-07 10:42:13
997456334816451	Candice's Store	Candice's Store Cards	Candice's Store (424411)	1% Cash Back	38102	0	2013-04-19 15:30:10
997456334816451	Candice's Store	Candice's Store Cards	Candice's Store (424411)	1% Cash Back	38005	00001	2013-04-19 13:47:02

7. Xml Dashboard

This one can get confusing but basically if the column is green the transaction was successful

Transaction

	TRANSACTION ID	TRANSACTION TYPE	LOCATION	ERROR CODE	ERROR DESCRIPTION	TRANSACTION DATE
↑	54129	Gift Issuance	The Boutique - Cape Town	0		2013-05-10 13:09:17
↓	54129	Gift Issuance	The Boutique - Cape Town	0		2013-05-10 13:09:17
↑	53806	Balance Inquiry	The Boutique - Johannesburg	0		2013-05-10 11:39:01
↓	53806	Balance Inquiry	The Boutique - Johannesburg	0		2013-05-10 11:39:01

If it is red it was not successful and it tells you what was wrong, in the case below the card number either did not exist or it was typed in wrong or the card set is not linked to your program (see getting started guide)

↓	53261	Enrollment	The Boutique - Cape Town	6	Invalid Account Details	2013-05-10 09:31:24
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Support

If you have any questions, please contact The Loyalty Box.

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