LifeClub Rewards Program

Your Reporting User Guide

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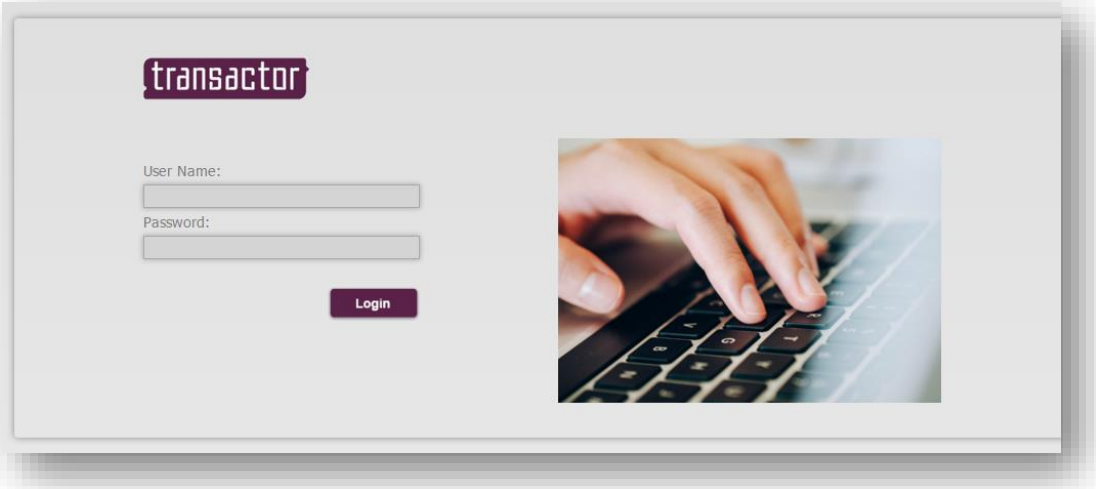
Login Details

Simply login to your reporting account to gain access to daily reports and analyse your store/group performance.

Website Access: http://transactorbi.com/

Your username and password will be provided via email.



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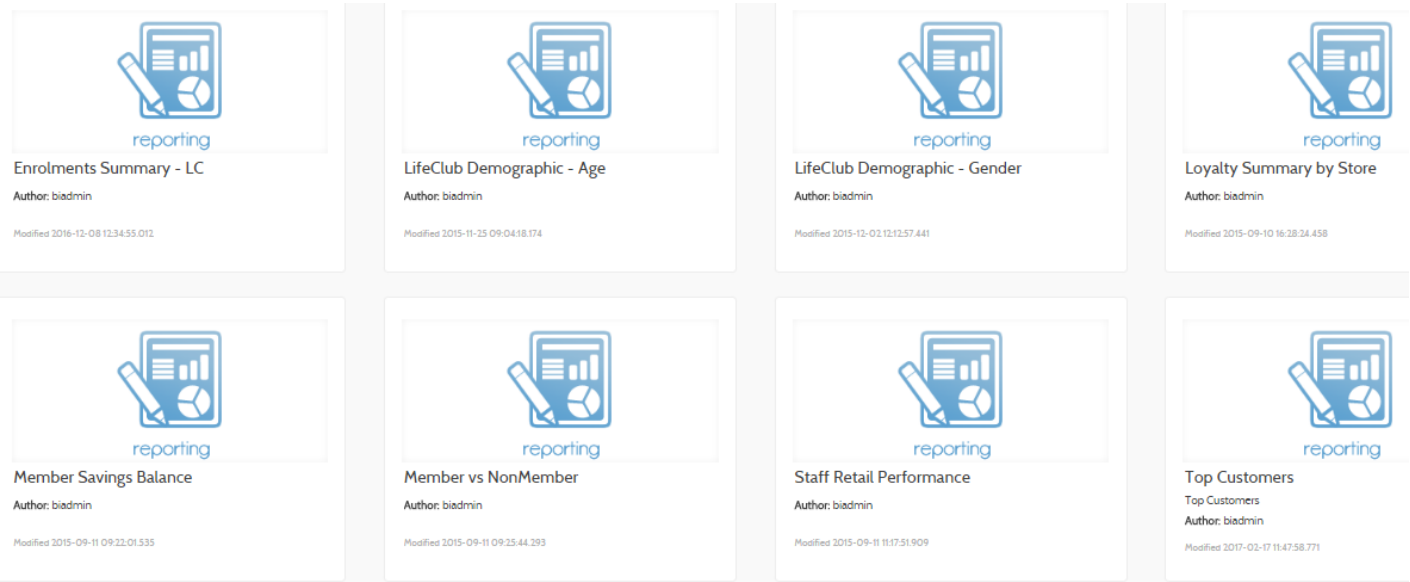
Reports Overview

There are 6 reports available within your account, plus a Dashboard and Top Customer overview:

- Dashboard
- Demographic Age
- Demographic Gender
- Enrolment Summary
- Loyalty Summary
- Member Savings Balance
- Member Vs Non-Member
- Staff Retail Performance
- Top Customers



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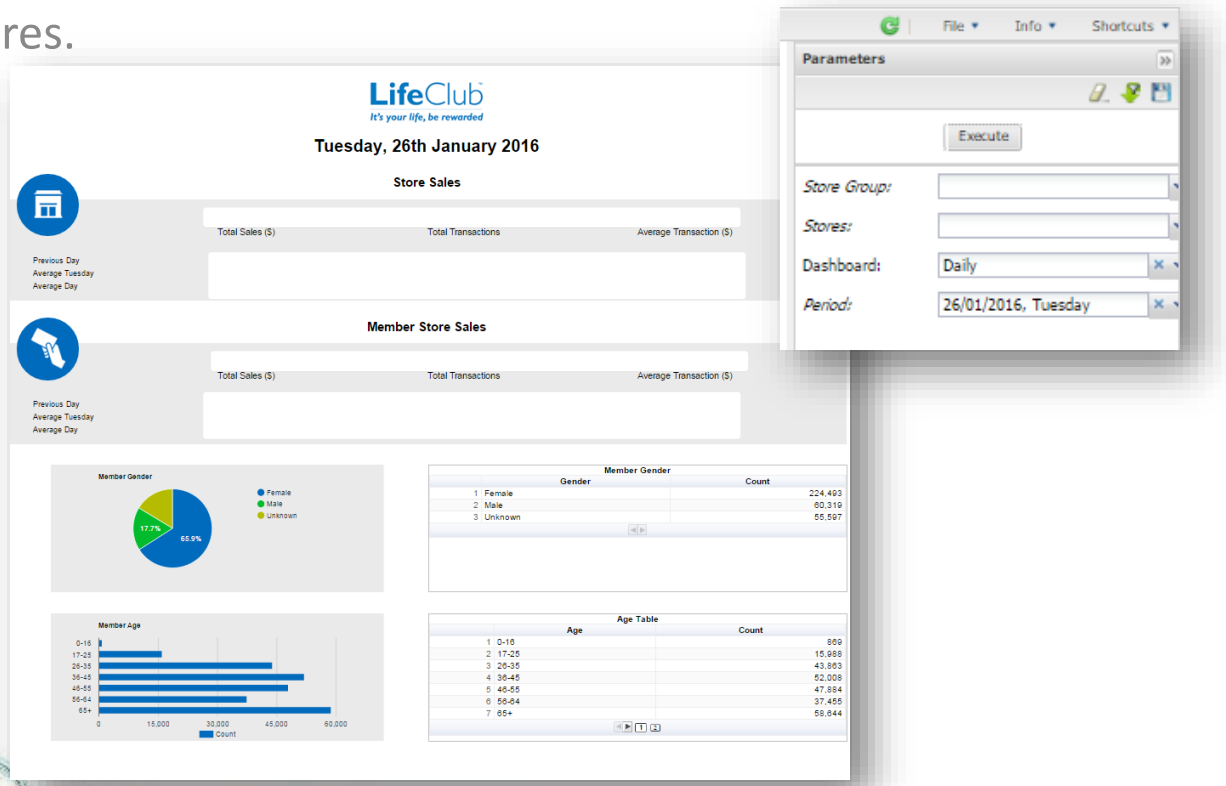
Dashboard

The dashboard report loads automatically when you login, and defaults to showing the day priors data as a snapshot for store sales and member sales, and a store overview of demographics.

Filters

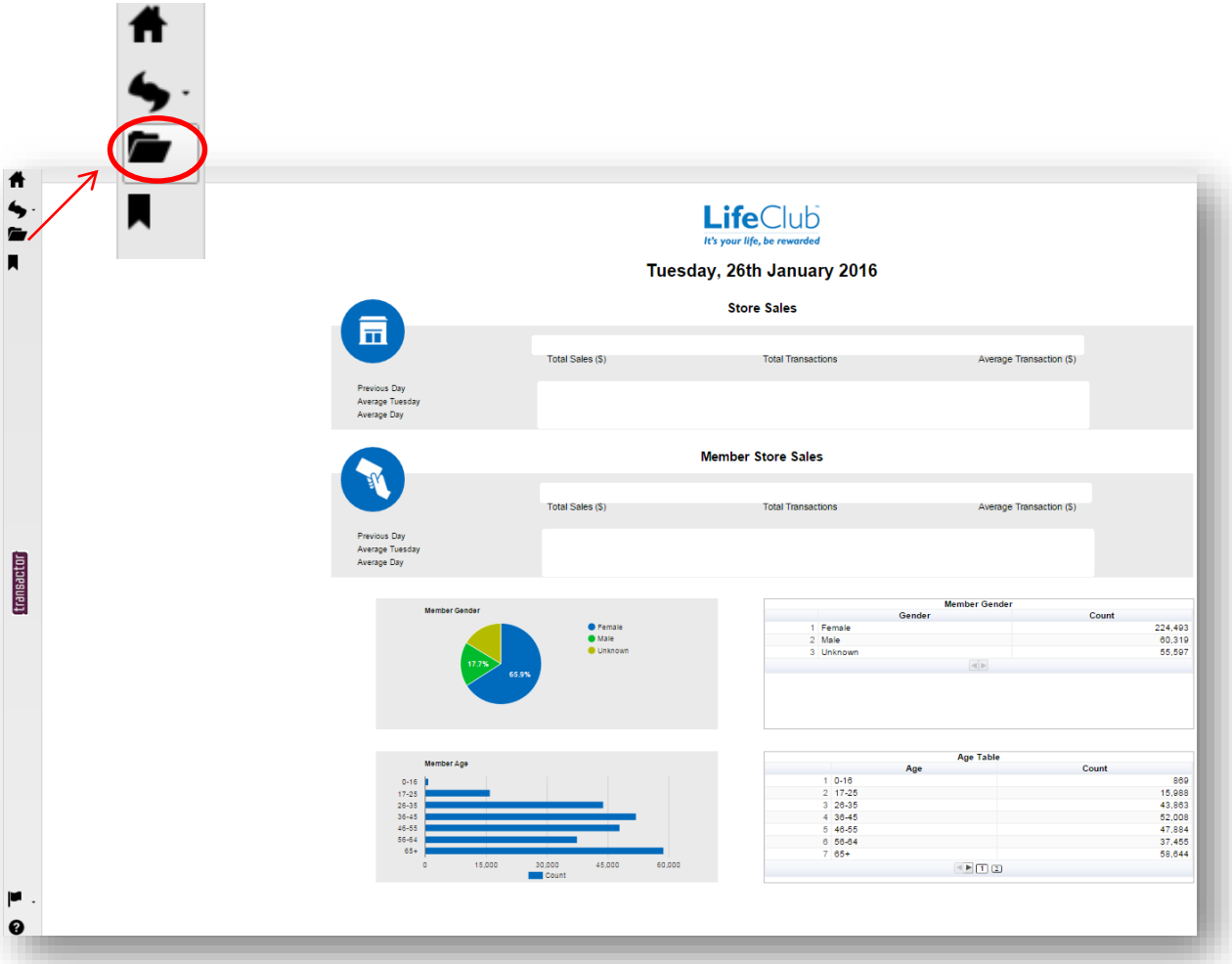
On the right top corner there are filters available to change the view based on a day, week, month, quarter or year, and then the period based on specific dates.

Use the Store Group/Store filters if you have access to multiple stores.



Navigating Report Menu

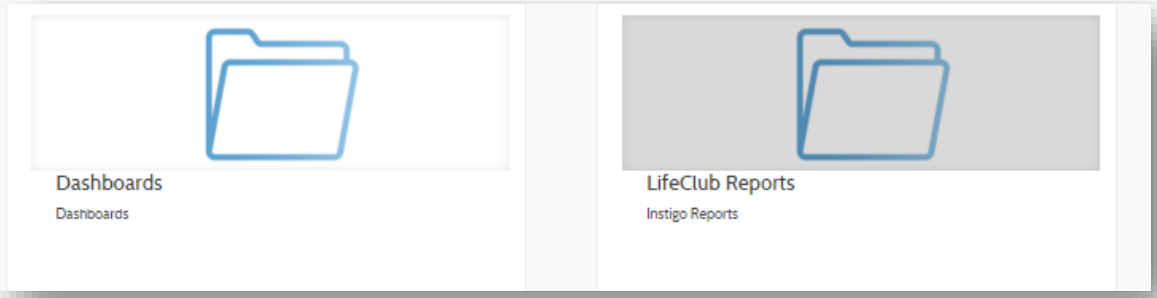
When finished with the dashboard, simply click on the ‘Folder’ icon in the top left menu.



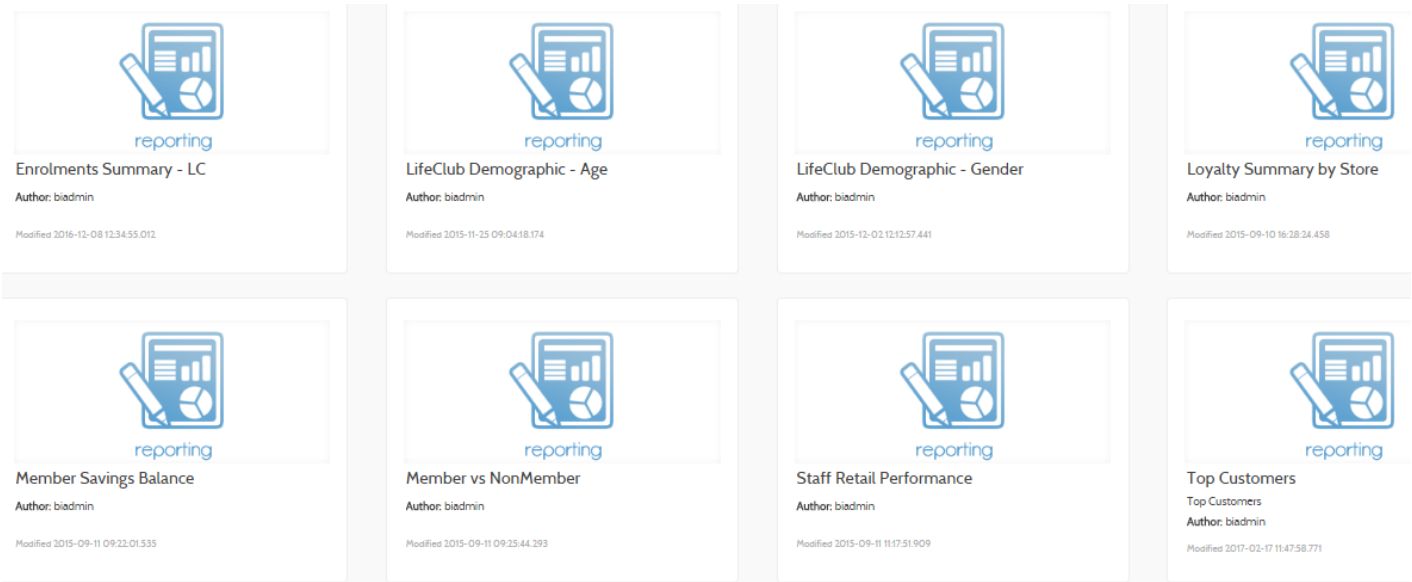
Reports

After clicking on the ‘Folder’ icon, you will be directed to the below page.

- Dashboard: Provides options of going back to the dashboard or viewing your top customers
- LifeClub Reports: takes you to the suite of reports available



After clicking the ‘LifeClub Reports’ folder, the below report selection will load.



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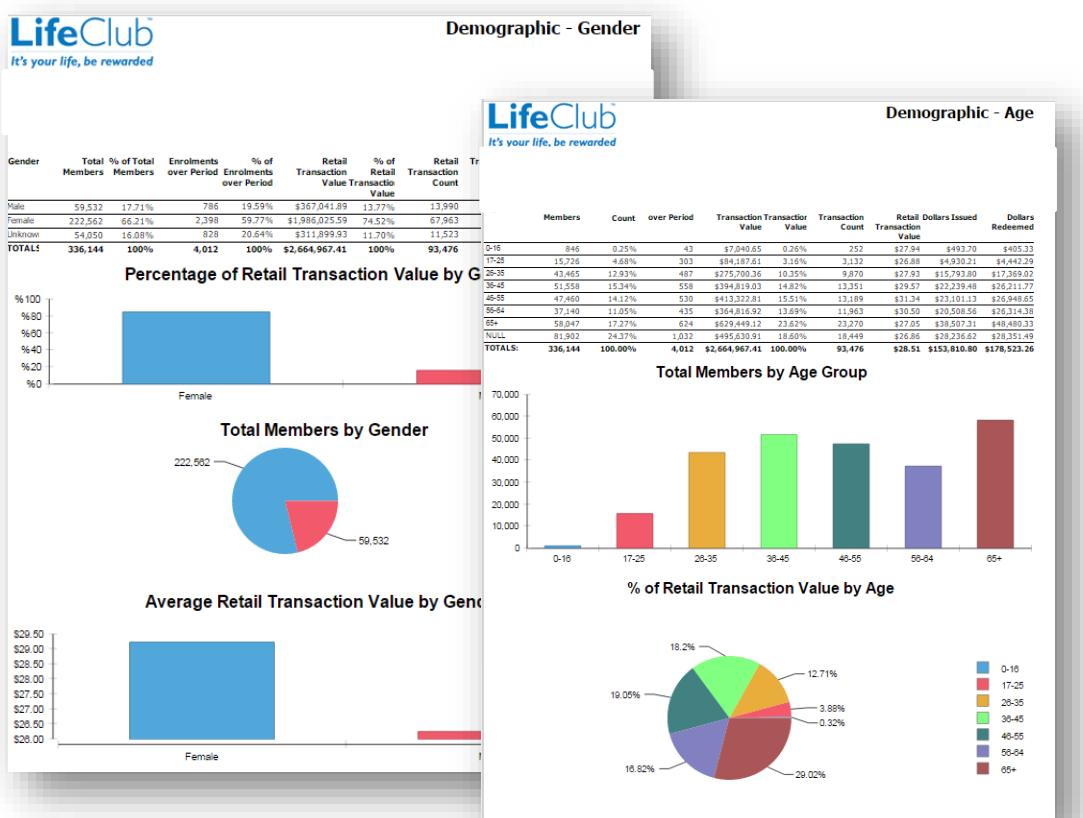
Demographics

Age & Gender

It is important to understand your shopper to ensure you market your business accordingly. View these demographic reports to see your database split by gender and age, showing their spend, Average Retail Value and Transaction Count.

Tip: If you have a high amount of customers sitting within the 'Unknown' bracket for gender or age, make sure staff are entering the gender/date of birth field on the enrolment form to help you target more appropriately.



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Demographic - Gender

Gender	Total Members	% of Total Members	Enrolments over Period	% of Enrolments over Period	Retail Transaction Value	% of Retail Transactio Value	Retail Transaction Count	Tr
Male	59,532	17.71%	786	19.59%	$367,041.89	13.77%	13,990	
Female	222,562	66.21%	2,398	59.77%	$1,986,025.59	74.52%	67,963	
Unknown	54,050	16.08%	828	20.64%	$311,899.93	11.70%	11,523	
TOTALS	**336,144**	**100%**	**4,012**	**100%**	**$2,664,967.41**	**100%**	**93,476**	

Percentage of Retail Transaction Value by G

Total Members by Gender

Average Retail Transaction Value by Genc

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Demographic - Age

	Members	Count	over Period	Transaction Value	Transactior Value	Transaction Count	Retail Transaction Value	Dollars Issued	Dollars Redeemed
0-16	846	0.25%	43	$7,040.65	0.26%	252	$27.94	$493.70	$405.33
17-25	15,726	4.68%	303	$84,187.61	3.16%	3,132	$26.88	$4,930.21	$4,442.29
26-35	43,465	12.93%	487	$275,700.36	10.35%	9,870	$27.93	$15,793.80	$17,369.02
36-45	51,558	15.34%	558	$394,819.03	14.82%	13,351	$29.57	$22,239.48	$26,211.77
46-55	47,460	14.12%	530	$413,322.81	15.51%	13,189	$31.34	$23,101.13	$26,948.65
56-64	37,140	11.05%	435	$364,816.92	13.69%	11,963	$30.50	$20,508.56	$26,314.38
65+	58,047	17.27%	624	$629,449.12	23.62%	23,270	$27.05	$38,507.31	$48,480.33
NULL	81,902	24.37%	1,032	$495,630.91	18.60%	18,449	$26.86	$28,236.62	$28,351.49
TOTALS:	**336,144**	**100.00%**	**4,012**	**$2,664,967.41**	**100.00%**	**93,476**	**$28.51**	**$153,810.80**	**$178,523.26**

Total Members by Age Group

% of Retail Transaction Value by Age

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Enrolment Summary

Get a quick snapshot of the number of new enrolments signed up to the LifeClub program within the date range selected. You will be able to compare on the period prior to see the uplift.

Current	Previous	Change
187	177	5.65%

Loyalty Summary

This report shows your loyalty as a percentage of retail transactions, reward dollars issued and redeemed as well as looking at the change from the period prior.

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Loyalty Summary by Store

Reporting period from 01/12/2015 to 31/12/2015 (comparing period from 31/10/2015 to 30/11/2015)

UserID : MAINZ_193_INSTIGO

Merchant Name	Total Retail Sales	Change	Total Loyalty Retail Sales	Change	# Retail Transactions	Change	# Loyalty Retail Trans	Change	% Loyalty/Total Retail Transactions	Change	Average Loyalty Retail Transaction	Change	Purchase Frequency	Change	Reward Dollars Issued	Change	Reward Dollars Redeemed	Change
	$171,279	29.08%	$100,179	41.82%	5,022	18.70%	2,954	21.80%	58.82%	-1.90%	$33.91	21.80%	1.57	9.00%	$5,058	4.85%	$6,759	78.65%
Total	$171,279	29.08%	$100,179	41.82%	5,022	18.70%	2,954	16.44%	58.82%	-1.90%	$33.91	21.80%	1.57	9.00%	$5,058	4.85%	$6,759	78.65%

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Member Savings Balance

Customer contactibility is broken down based on their reward dollar balance within this report. This is a helpful report when deciding whether to participate in email and direct mailer communications focusing on redemption and reactivation. Research shows when customers redeem reward dollars they tend to spend more per transaction than a non-redeemer.

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Member Savings Balance

All	Loyalty Balance	Total Members	Total Outstanding Loyalty Balance	Less than 1 Month Since Last Txn	Last Txn Betw. 1 - 2 Months	Last Txn More than 3 Months
	0 - $4.99	202,158	$418,781	25,992	24,433	61,372
	$5 - $9.99	61,662	$434,457	13,476	9,312	16,143
	$10 - $14.99	22,054	$267,307	6,132	3,383	5,463
	$15 - $19.99	9,542	$163,770	3,052	1,603	2,070
	$20 - $24.99	4,943	$110,017	1,750	804	995
	$25 - $29.99	2,791	$76,198	994	486	551
	More than $30	5,865	$43,247,230	2,788	920	995
	Total :	**309,015**	**$44,717,760**	**54,184**	**40,941**	**87,589**

Emailable	Loyalty Balance	Total Members	Total Outstanding Loyalty Balance	Less than 1 Month Since Last Txn	Last Txn Betw. 1 - 2 Months	Last Txn More than 3 Months
	0 - $4.99	84,202	$178,514	10,411	9,599	24,724
	$5 - $9.99	26,098	$183,570	5,572	4,046	7,276
	$10 - $14.99	9,769	$118,461	2,676	1,510	2,595
	$15 - $19.99	4,205	$72,196	1,392	715	1,002
	$20 - $24.99	2,278	$50,777	806	383	504
	$25 - $29.99	1,314	$35,886	490	248	269
	More than $30	2,996	$155,096	1,498	480	565
	Total :	**130,862**	**$794,500**	**22,845**	**16,981**	**36,935**

Mailable	Loyalty Balance	Total Members	Total Outstanding Loyalty Balance	Less than 1 Month Since Last Txn	Last Txn Betw. 1 - 2 Months	Last Txn More than 3 Months
	0 - $4.99	196,922	$408,633	25,400	23,676	58,222
	$5 - $9.99	60,519	$426,477	13,228	9,126	15,679
	$10 - $14.99	21,720	$263,324	6,027	3,328	5,331
	$15 - $19.99	9,458	$162,318	3,014	1,587	2,045
	$20 - $24.99	4,899	$109,036	1,741	788	983
	$25 - $29.99	2,769	$75,594	984	481	545
	More than $30	5,822	$43,243,951	2,769	913	979
	Total :	**302,109**	**$44,689,332**	**53,163**	**39,899**	**83,784**

Mailable with no email	Loyalty Balance	Total Members	Total Outstanding Loyalty Balance	Less than 1 Month Since Last Txn	Last Txn Betw. 1 - 2 Months	Last Txn More than 3 Months
	0 - $4.99	115,372	$235,759	15,378	14,548	35,220
	$5 - $9.99	35,017	$246,996	7,804	5,211	8,699
	$10 - $14.99	12,151	$147,273	3,412	1,855	2,831
	$15 - $19.99	5,298	$90,907	1,642	884	1,056
	$20 - $24.99	2,649	$58,876	940	419	486
	$25 - $29.99	1,470	$40,121	502	236	280
	More than $30	2,855	$43,091,461	1,285	439	423
	Total :	**174,812**	**$43,911,393**	**30,963**	**23,592**	**48,995**

Field	Full Field Name	Description
Loyalty Balance	Loyalty Balance	The Loyalty Balance Range
Total Members	Total Members	Total Members within the Loyalty Balance Range
Total Outstanding Loyalty Balance	Total Outstanding Loyalty Balance	Total unspent Loyalty remaining on Member Accounts
Less than 1 Month Since Last Txn	Less than 1 Month Since Last Transact	Number of Members who performed their last Transaction in less than a month.
Last Txn Betw. 1 - 2 Months	Last Transactions Between 1 to 2 Months	Number of Members who performed their last Transaction between 1 to 2 Months ago.
Last Txn More than 3 Months	Last Transaction More than 3 Months	Number of Members who performed their last Transaction more than 3 Months ago

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Member Vs Non-Member

To further analyse your loyalty performance, this report compares LifeClub members and non-members based on retail sales, number of transactions, average retail sale (ARS) and number of products per retail transaction/overall transaction.

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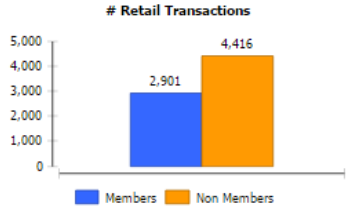
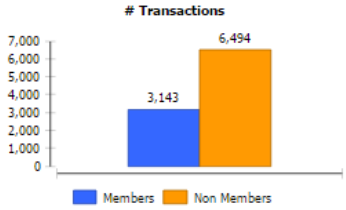
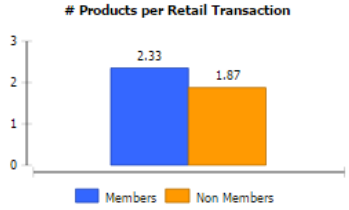
Member vs NonMember

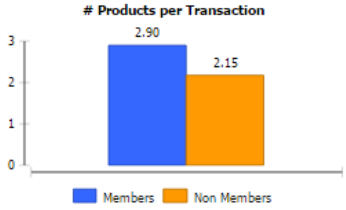
UserID : MAINZ_193_INSTIGO

Store Name	Retail Transaction Value		# Retail Transactions		# Transactions		Average Retail Transaction Value		Average Transaction Value		# Products per Retail Transaction		# Products per Transaction	
	Members	Non Memb.	Members	Non Memb.	Members	Non Memb.	Members	Non Memb.	Members	Non Memb.	Members	Non Memb.	Members	Non Memb.
	$74,377	$78,984	2,901	4,416	3,143	6,494	$25.64	$17.89	$32.38	$23.93	2.33	1.87	2.90	2.15









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Staff Retail Performance

This is a staff performance report, breaking down staff transactions based on the number they perform (retail and script), ARS of all transactions and loyalty, their % of loyalty/retail transactions, number of items per basket as well as the number of new LifeClub enrolments they performed for the month.

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Staff Retail Performance

Reporting period from 01/12/2015 to 31/12/2015

UserID : MAINZ_193_INSTIGO

Cashier names listed here

Operator Name	Number of Transactions	Number of Retail Transactions	Average Transactions Value	Average Retail Transactions Value	Number of Loyalty Transactions	Number of Loyalty Retail Transactions	% of Store Total	Average Loyalty Retail Transactions Value	% Loyalty/Retail Transactions	Number of Items per Basket (Retail)	Number of Enrolments
	2,378	1,783	$26.85	$21.21	926	863	29.46%	$25.93	48.40%	2.01	34
	1,175	908	$26.01	$20.28	377	354	11.99%	$24.63	38.99%	2.08	13
	1,167	893	$26.86	$22.67	440	421	14.00%	$27.43	47.14%	2.28	17
	1,164	892	$26.60	$20.73	276	257	8.78%	$26.61	28.81%	1.91	4
	991	733	$26.33	$20.76	291	260	9.26%	$24.73	35.47%	1.94	5
	476	360	$25.85	$18.84	99	90	3.15%	$21.53	25.00%	1.95	0
	419	326	$25.97	$19.37	135	125	4.30%	$21.58	38.34%	1.94	6
	385	289	$27.91	$21.47	103	93	3.28%	$29.28	32.18%	1.87	2
	382	280	$27.87	$20.74	142	109	4.52%	$25.38	38.93%	2.06	1
	297	233	$28.51	$22.65	80	75	2.55%	$27.31	32.19%	2	1
	257	205	$27.71	$20.27	106	93	3.37%	$23.32	45.37%	2.11	2
	236	178	$25.13	$20.06	75	72	2.39%	$23.65	40.45%	1.82	3
	121	95	$24.51	$21.37	50	46	1.59%	$26.99	48.42%	4.2	1
	62	49	$26.39	$19.42	12	12	0.38%	$17.89	24.49%	2.1	0
	55	40	$29.38	$22.19	17	17	0.54%	$28.90	42.50%	1.85	3
	30	25	$30.68	$27.01	6	6	0.19%	$24.40	24.00%	2.32	1
	20	13	$32.98	$25.93	3	3	0.10%	$80.98	23.08%	1.46	0
	12	9	$26.36	$22.78	3	3	0.10%	$13.67	33.33%	1.78	0
	6	4	$20.69	$12.70	2	2	0.06%	$21.14	50.00%	1.5	1
	3	1	-$14.71	-$77.49	0	0	0.00%		0.00%	1	0
	1	1	$18.30	$6.10	0	0	0.00%		0.00%	1	0
	0	0	$0.00		0	0	0.00%				6
	9,637	**7,317**	**$26.68**	**$20.96**	**3,143**	**2,901**	**100.00%**	**$25.64**	**39.65%**	**2.05**	**100**

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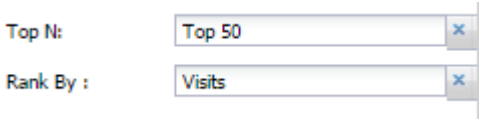
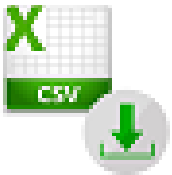
Top Customers

Get to know who your top customers are by running this report. Simply use the filter options on the right to nominate the view of top 20, 50, 200 or 500, and rank in order of number of visits or total spend with the date range selected.



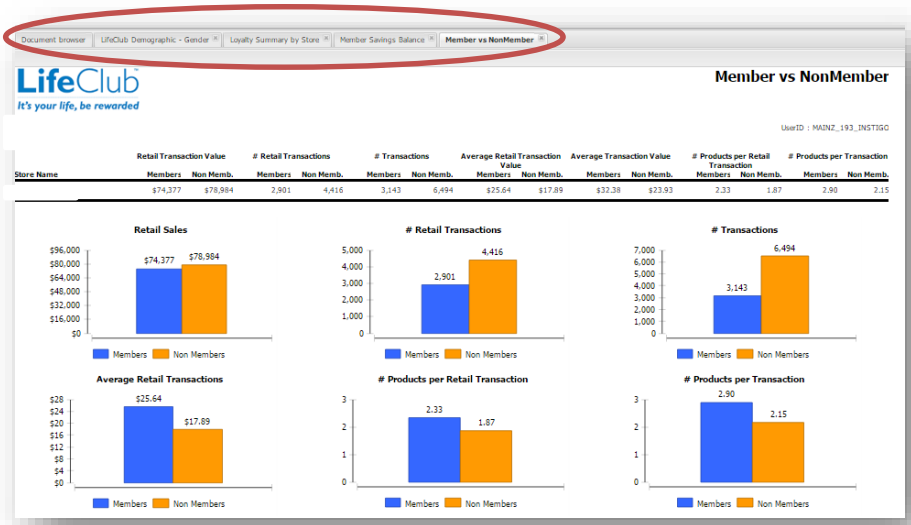
The report will load with the following columns of data, and can be exported into excel by clicking the green icon at the top right of the report table.



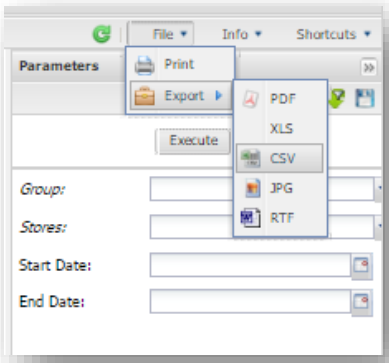
- Customer Name
- Address, Email, Phone
- First & Last Transaction Date
- Number of visits in period selected
- Total Spend in period selected (Retail & Script)
- Average Transaction Sale in period (Retail & Script)
- Total Retail Spend in period
- Average Retail Sale in period

Helpful Hints

1. Make sure the report you have opened fully loads before going back to the main report selection tab (labelled ‘Document Browser’) and opening another report.



2. Exporting Reports into PDFs, excel and other files for staff members and easy access. In the top right corner, simply click File, Export and then your program of choice.



3. All reports default to the time period of the full month prior. To change the time frame, simply use the filters on the top right corner as per the above screen shot.

User Note

Internet Explorer is no longer supported by Microsoft Office, resulting in not being 100% compatible with the LifeClub reporting site.

If you use Internet Explorer, you may notice graphs may not load and filters are not as user friendly.

It is recommended to use Google Chrome or Microsoft Edge.

For any questions, please contact the LifeClub team on 02 9248 2600.

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