Oracle Loyalty Cloud

Creating and Administering Analytics and Reports for Loyalty

21D

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21D
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Contents

Preface

This preface introduces information sources that can help you use the application.

Using Oracle Applications

Help

Use help icons ? to access help in the application. If you don't see any help icons on your page, click your user image or name in the global header and select **Show Help Icons**. Not all pages have help icons.

If you don't see **Show Help Icons** in the Settings and Actions menu, you can access the Oracle Help Center to find guides and videos.

Watch: This video tutorial shows you how to find and use help.

You can also read about it instead.

Additional Resources

- **Community:** Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.
- **Training:** Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

Convention	Meaning
boldface	Boldface type indicates user interface elements, navigation paths, or values you enter or select.
`monospace`	Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.
>	Greater than symbol separates elements in a navigation path.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website.

Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.

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1 About This Guide

Audience and Scope

Use this guide if you're an Oracle Loyalty Cloud administrator or program manager tasked with creating, modifying, and administering Loyalty Cloud analytics. This guide assumes that you have the permissions to perform the following tasks:

- Edit loyalty analytics that come with the application.
- Build new loyalty analytics and subject areas as required.
- Access all loyalty analytics with full read write permissions.

For information on Oracle Loyalty Cloud implementation, security, and other topics, see the guides in the Related Guides section of this chapter.

Note: This guide is a companion document to the Oracle CX Sales Creating and Administering Analytics guide. This guide assumes that you're familiar with the analytics functionality provided with Oracle CX Sales. In particular, make sure you're familiar with the chapters that describe the following topics:

- Overview of analytics
- Setup and configuration
- Managing analytics folders
- Creating and editing analytics
- Managing analytics in work areas
- Creating company-specific subject areas
- Sharing analytics

This guide provides loyalty-specific information on working with the following items:

- Loyalty infolets
- Prebuilt loyalty analytics
- Prebuilt loyalty dashboards

Related Guides

For additional Oracle Loyalty Cloud learning resources, refer to the Oracle Help Center, application online help, and Oracle University.

The following table shows a list of guides that contain information related to the areas covered in this guide.

Guide Title	Description
Implementing Loyalty	This guide describes the tasks to perform to configure and set up Oracle Loyalty Cloud.

Guide Title	Description
Securing Oracle Loyalty Cloud	This guide contains details about user permissions and role-based access to application objects and functionality. Access to analytics is defined by user roles. This guide describes how to enable user access to Oracle Loyalty Cloud functions and data. Some of the tasks described in this guide are performed only or mainly during implementation of Oracle Loyalty Cloud. Most, however, can be performed at any time and as new requirements emerge.
Oracle CX Sales - Creating and Administering Analytics	This guide is intended for administrators and other job roles tasked with creating, modifying, and administering Oracle CX Sales analytics.

Related Topics

- Oracle Loyalty Cloud Subject Areas for Transactional Business Intelligence in Loyalty
- Implementing Loyalty
- Securing Loyalty
- Oracle CX Sales - Creating and Administering Analytics
- Oracle Applications Cloud - Creating and Administering Analytics and Reports

2 Work with Loyalty Subject Areas

Manage Analytics in BI for Loyalty Cloud

As a Loyalty administrator, your main work area for analytics is Business Intelligence (BI). To create new Loyalty analytics, and to edit prebuilt Loyalty analytics, you navigate from the Home Page to BI.

To navigate to BI:

1. Open Tools, and select Reports and Analytics.
2. In the Reports and Analytics pane, select Browse Catalog.

Create Analytics with Loyalty Subject Areas

You create analytics for Loyalty in Oracle Business Intelligence (BI) Answers using the default ready-to-use subject areas. You can build your own analyses, as well as your own subject areas.

> **Note:** Oracle Loyalty Cloud doesn't support personalized or extended subject areas. Oracle Loyalty Cloud supports all extension attributes except the "Long Text" extension attribute in this release.

For detailed descriptions of the Oracle Loyalty Cloud subject areas, how to use those subject areas to answer business questions, and for information on the security roles associated with the subject areas, see Oracle Loyalty Cloud Subject Areas for Transactional Business Intelligence in Loyalty.

Understand Loyalty Subject Areas

Creating an analysis begins with subject areas. A subject area is a grouping of information pieces, or more technically, a grouping of data objects, that relate to each other in a particular context. Examples of such context are member, member status, referral status, transactions, and so on.

Data objects for a subject area are pulled from your transactional database and then grouped together in a way that answers a specific set of questions about your loyalty program. Every time someone adds loyalty information, and saves the information, you can use that information to build real-time and historical analyses. You can group anything that involves a loyalty transaction into a subject area, and then build analytics that expose key metrics for your loyalty program.

Work with Loyalty Subject Areas

BI builds standard subject areas from loyalty objects such as member or transaction. The attributes of these objects are available in the Dimension folders and you can add them to your analyses as columns. An attribute could be member type, member status, or program, and so on. The Fact folders contain filters to count or measure the information.

Related Topics

- Oracle Loyalty Cloud Subject Areas for Transactional Business Intelligence in Loyalty

Explore the Subject Area Context

A context for a subject area defines what column details the analysis displays. Adding a Member column doesn't mean that all members show in the analysis. It depends on the context you're using to create the analysis. If you build an analysis, and it doesn't show what you're expecting, be sure that you're adding your columns and facts in context.

The dimension folders for subject areas contain the columns and the facts folders that define the relationship of the columns. For example, if you add the Program column to your analysis, and then add the Number of Active Members fact to the same analysis, then only the active members within each program show on this analysis in this context. If there are many members that are part of the program, but if their status isn't active, then they aren't included in your analysis.

To further explore this concept, you can build a loyalty member analysis, add an additional subject area, and then explore some different scenarios:

1. In BI, from the New field, select Analysis to build a new analysis.
2. From the Select Subject Area window, select the Loyalty - Members Real Time subject area.

   > **Note:** To make use of the loyalty analytics functionality, use only the subject areas that are relevant to loyalty, even if there are other subject areas available. The loyalty subject areas begin with the term "Loyalty".

3. Expand Loyalty - Members Real Time, expand Program, and then select Program and Program Description so they appear on the palette.
4. Expand Tier, and then select Tier Name so it appears on the palette.
5. Expand Facts, then expand Member Facts, and then select # of Active Members so they appear on the palette.

   This fact is key to this analysis because the relationship of Program to this subject area is dependent on Membership Status. If there aren't any active members in the loyalty program, then BI doesn't generate the report. Because the context of this subject area has to do with loyalty members, only active members of the loyalty program are included, and further categorized by member tier.
6. Select the Results tab to see the number of active members in the loyalty program, categorized by Tier Name.
7. Select the Criteria tab, and in Subject Areas, expand Facts and select # of Primary Points so that it appears on the palette.

   In the Results tab, you can find the total number of primary points for all the active members in the loyalty program.
8. Go back to the Criteria tab and remove Program, Program Description, and Tier Name.

   In the Results tab, you can find all the number of active members across all loyalty programs, and the total number of primary points they have.

Create a Member Analysis

You can create a member analysis from subject areas in Oracle Business Intelligence (BI) using the New Analysis wizard.

When you're planning to build an analysis from a subject area, consider the objectives for the analysis. For example, consider what metrics you want to include. Subject areas answer business questions, for example, you can get answers to the following business questions by using the Loyalty- Members Real Time Subject Area:

- How many members are enrolled in my loyalty program?
- How many members are active?
- What is the number of primary points that members own?
- What is the total liability of the loyalty program?
- How are members spread across different tiers?
- How are members spread across different member groups and classifications?

If you're a loyalty marketing manager or program manager, and you're interested in how your members are spread across different tiers, then you might want to get a quick snapshot of how the members are distributed. You can build an analysis to look at this information.

To build a simple activity analysis from a subject area:

1. In BI, from the New field, select Analysis.
2. From the Select Subject Area window, select Loyalty- Members Real Time Subject Area, and then complete the following:
   a. From the Program dimension, add Program and Program Description.
   b. From the Tier dimension, add Tier Name.
   c. From the Facts folder, expand Member facts, and add # of Active Members.
   d. Select the Results tab to view the results of the analysis.
3. If you want to know the member names, from the Criteria tab, remove the # of Active Members fact, add Member Name from the Member dimension to the analysis.
4. Select the Results tab to see the distribution of members over all loyalty programs categorized by the program tier.

   You can move back and forth between the Criteria tab and the Results tab at any time to see your analysis.
5. Name and save your analysis.

Loyalty Cross Subject Area Queries

Each subject area contains a collection of dimensional attributes and measures relating to a one-dimensional STAR model, which groups them into individual folders. The term STAR refers to the semantic model where a single fact is joined to multiple dimensions. You can create an analysis that combines data from more than one subject area. This type of analysis is a cross-subject area query. Cross-subject area queries are classified into three broad categories:

- Combining queries from multiple subject areas.
  - Using common (conformed) dimensions.
  - Using local and common (confirmed) dimensions.
- Using a "set" operation (Union or Union All for example) to combine more than one result set from different subject areas.
- Combining Logical SQL using the Advanced tab.

A common dimension is a dimension that exists in all subject areas that are joined in an analysis. For example, Member dimension is the common dimension for the Member Real-Time and Transaction Real-Time subject areas.

A local dimension is a dimension that exists only in one subject area. For example, Product and Partner are local dimensions for the Transaction Real-Time subject area.

The following are some general guidelines to follow when working with multiple subject areas:

- If all the metrics and attributes required for the analysis are available in a single subject area and fact metrics, use only that subject area, and don't create a query for the cross subject area. Performance is better with such an analysis and the analysis is easier to maintain.
- When joining two subject areas in an analysis, make sure to use at least one attribute from a common dimension in the analysis.
- When using common dimensions, always choose the attributes from the common dimension from a single subject area. For example, if you're using the Member dimension to build a query between the Member Real-Time Subject Area and the Transaction Real-Time Subject Area, then select all Member dimensions from both the subject areas. In some scenarios, the common dimension might have more attributes in one subject area than in the other subject area. In this situation, you can only use the subset of common attributes for a cross-subject area query.
- Always include a measure from each subject area that's being used in your analysis. You don't have to display measures or use them, but it's recommended that you include them. You can hide a measure if you don't need it in the analysis.
- When using common and local dimensions use SET VARIABLE ENABLE_DIMENSIONALITY=1; in the Advanced SQL tab.

Combine Queries from Multiple Subject Areas

The simplest and fastest way to generate an analysis is to use a single subject area. If the dimension attributes and fact metrics that you're interested in are all available from a single subject area, then you should use that subject area to build the analysis. Such an analysis results in better performance and is much easier to maintain.

If your analysis requirements can't be met by any single subject area because you require metrics from more than one subject area, you can build a cross-subject area query using common dimensions. In this case, build a cross-subject area query using only common dimensions.

In addition, if you use three subject areas for an analysis, then common dimensions must exist in all three subject areas. Joining common dimensions gives you the benefit of including any metric from any of the subject areas in a single analysis.

While you can create an analysis by joining any subject area to which you have access, only a cross-subject area query that uses common dimensions returns data that's at the same dimension grain. This query results in a clean merge of the data, and the analysis returns exactly the data you want to see.

Knowing how BI executes cross-subject area queries helps you to understand the importance of using common dimensions when building such an analysis. When BI generates a cross-subject area analysis, it executes separate queries for each subject area in the analysis and merges the results to generate the final analysis. BI merges the data from the different subject areas using the common dimensions and returns it. When you use common dimensions, the result set returned by each subject area query is at the same dimensional grain, so BI can cleanly merge and render the analysis.

Use Common Dimensions for an Analysis

This example shows how you can bring together the Total Liability, # of Status Changes, and the Total Revenue metrics in a combined report.

This example analysis uses the following subject areas:

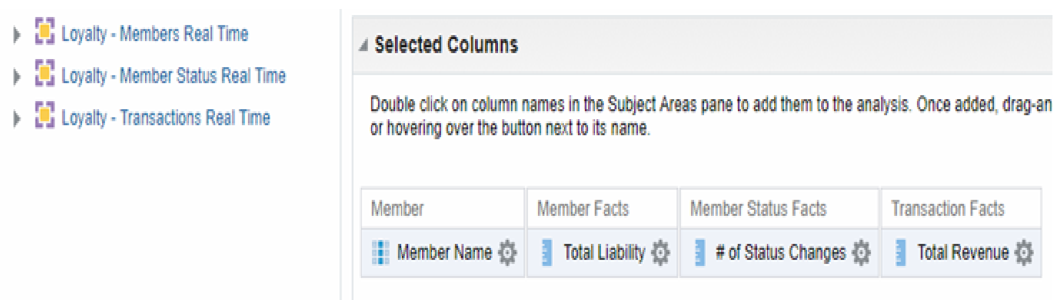
- Subject area 1: Loyalty - Members Real Time
- Subject area 2: Loyalty - Member Status Real Time
- Subject area 3: Loyalty - Transactions Real Time

The example uses Member as a common dimension to relate the information from the multiple subject areas. Instances of the Member dimension exist in each one of these subject areas.

The metrics used from the three subjects areas are:

- Loyalty - Members Real Time: Member Facts and Total Liability
- Loyalty - Member Status Real Time: Member Status Facts and # of Status Changes
- Loyalty - Transactions Real Time. Transaction Facts and Total Revenue

The following figure shows an illustration of the answer created on the BI composer interface.



For this example, you can see the following SQL on the Advanced tab of the answer:

```
SELECT
 0 s_0,
 "Loyalty - Members Real Time"."Member"."Member Name" s_1,
 "Loyalty - Member Status Real Time"."Member Status Facts"."# of Status Changes" s_2,
 "Loyalty - Members Real Time"."Member Facts"."Total Liability" s_3,
 "Loyalty - Transactions Real Time"."Transaction Facts"."Total Revenue" s_4
FROM "Loyalty - Members Real Time"
ORDER BY 1, 2 ASC NULLS LAST
FETCH FIRST 150001 ROWS ONLY
```

Use Set Operations to Combine Result Sets from a Subject Area

This example illustrates a compound analysis query that's a union of the result subsets from two subject areas.

The objective in this example is to build a combined list of high value members who have either:

- Referred more than 3 new member (result-set 1)
- Generated revenues exceeding 15,000 during their lifetime (result-set 2)

The Logical SQLs corresponding to the two result-sets are as follows:

- Result-set 1:

```
SELECT
 0 s_0,
 "Loyalty - Members Real Time"."Referral Source"."Referral Source Name" s_1,
 "Loyalty - Members Real Time"."Referral Source"."Referral Source Number" s_2
FROM "Loyalty - Members Real Time"
WHERE ("Member Facts"."# of Members" > 3)
```

- Result-set 2:

```
SELECT
 0 s_0,
 "Loyalty - Transactions Real Time"."Member"."Member Name" s_1,
 "Loyalty - Transactions Real Time"."Member"."Member Number" s_2
FROM "Loyalty - Members Real Time"
WHERE ("Loyalty - Transactions Real Time"."Transaction Facts"."Total Revenue" >= 15000)
```

You can combine the two Logical SQLs using the UNION ALL set operator as follows:

```
SELECT "Loyalty - Members Real Time"."Referral Source"."Referral Source Name" s_1,
 "Loyalty - Members Real Time"."Referral Source"."Referral Source Number" s_2
FROM "Loyalty - Members Real Time"
WHERE ("Member Facts"."# of Members" > 3)
UNION ALL
SELECT "Loyalty - Transactions Real Time"."Member"."Member Name" s_1,
 "Loyalty - Transactions Real Time"."Member"."Member Number" s_2
FROM "Loyalty - Members Real Time"
WHERE ("Loyalty - Transactions Real Time"."Transaction Facts"."Total Revenue" >= 15000)
```

Note: You can execute this SQL on the Advanced tab of BI Answers, by creating a new analysis using this SQL.

Extract the Data Store for the Loyalty Offering

Use the Oracle BI Cloud Connector Console to extract the data store offering. A list of all available Oracle Loyalty Cloud data store offerings are listed in the R13.x CX BI Cloud Adapter BI View Object to Database Lineage Mapping Spreadsheet. This spreadsheet is available in the BI Cloud Connector Console Overview Page topic in the Creating a Business Intelligence Cloud Extract guide.

To extract the data store offering:

1. Log in to the Oracle BI Cloud Connector.
2. View a list of enabled data stores for an offering by clicking the Manage Offerings and Data Stores link in the panel tab.
3. Select the Loyalty offering and verify that the data store you're extracting from is available.

   If a data store you require isn't available by default for extraction, the instructions below describe how to manually add it.
4. To extract Business Intelligence data from the data store, click Manage Extract Schedules in the panel tab.
5. Click the + (plus) button to create a schedule for a one-time or a recurring data extraction, and to monitor the last scheduled run and to verify completion.

Manually Add A Data Store

Let's say you want to extract the data store: CrmAnalyticsAM.LoyaltyExtractAM.PointSubtypePVO. However, it's not available by default in the Manage Offerings and Data Stores link. You can manually add this data store so you can extract it.

1. Click the + (plus) button to add the data store.

   In this example, select the following values:

   - **Data Store Key:** CrmAnalyticsAM.LoyaltyExtractAM.PointSubtypePVO
   - **Selected Offerings:** Loyalty
2. Click Save.
3. Click Select Columns.

   The Data Store Column Selection pane opens.
4. Click Select, and then Select All to include all columns.
5. In the Column Name column, locate LoyPtsubtypeId and select the Primary Key check box.
6. Click Save.

   The data store called CrmAnalyticsAM.LoyaltyExtractAM.PointSubtypePVO is displayed, and can be extracted.

Related Topics

- Creating a Business Intelligence Cloud Extract

Repository and Session Variables for Business Intelligence

This table shows repository and session variables available for use in your analyses.

Variable Name	Type	Usage	Offering
CURRENT_DAY	Session Variable	Returns the value of Current Date.	All
CURRENT_MONTH	Repository Variable	Returns the value of Current Month in the YYYY/MM format.	All
CURRENT_WEEK	Repository Variable	Returns the value of the current week in YYYY Weeknnn format.	All
CURRENT_QUARTER	Repository Variable	Returns the value of Current Quarter in YYYY Q n format.	All

Variable Name	Type	Usage	Offering
CURRENT_YEAR	Repository Variable	Returns the value of Current Year in the YYYY format.	All
NEXT_MONTH	Repository Variable	Returns the value of Next Month in the YYYY / MM format.	All
NEXT_WEEK	Repository Variable	Returns the value of Next Week in the YYYY Week nn format.	All
NEXT_QUARTER	Repository Variable	Returns the value of Next Calendar Quarter in the YYYY Q nn format.	All
NEXT_YEAR	Repository Variable	Returns the value of Next Year in the YYYY format.	All
PREVIOUS_MONTH	Repository Variable	Returns the value of Previous Month in the YYYY/MM format.	All
PREVIOUS_WEEK	Repository Variable	Returns the value of Previous Week in the YYYY Week nn format.	All
PREVIOUS_QUARTER	Repository Variable	Returns the value of Previous Quarter in the YYYY Q nn format.	All

3 Work with Loyalty Infolets

Set Up the Loyalty Page Analytics

Loyalty administrators enable the loyalty pages on the Set System Options page. You can enable as many pages as you want, up to a total of five. Once you have enabled the pages, you can add analytics by navigating to the Loyalty Page from the white dots on the home page. You can complete the tasks in this section by creating and making changes in your sandbox. For more information about sandboxes, see Oracle CX Sales - Creating and Administering Analytics.

Enable the Loyalty Pages

Enable the loyalty pages by adding a check mark next to the pages you want available.

To enable the loyalty pages:

1. Open Tools, and then select Structure.
2. Select Set System Options.
3. On the Set System Options page, check the box next to the pages you want visible.
4. Click Save and Close.

Add Content to the Loyalty Pages

Add analytics to your loyalty pages in Edit Pages.

To add content to your loyalty page:

1. On the Loyalty page, click the field beside your user name, and select Edit Pages.

   > **Note:** You must be in a sandbox.

2. Select Job Role, and then select the role to which your change should apply.

   Any analytics you add in this context apply only to the role you define here.
3. Click OK.
4. Click Change Layout.
5. Select a layout.
6. Click Add Content and Open, and then navigate to BI and highlight an analytic to add.
7. Select OK.

Related Topics

- Oracle CX Sales - Creating and Administering Analytics

About the Loyalty Infolet Pages

On the Loyalty Infolet pages, each loyalty role has a set of prebuilt analytics that administrators enable. If you add personalized roles, then you must enable the Loyalty Infolet page for each new role.

The following table shows the infolets that are available by default for the loyalty marketing manager and loyalty program administrator roles.

Loyalty Infolet	Description
Active Members	This infolet provides the total number of active members across all loyalty programs.
Member Churn Rate	This infolet provides the member churn rate across all loyalty programs for the last month.
Member Growth Rate	This infolet provides the member growth rate across all loyalty programs for the last month.
Total Membership	This infolet provides the total number of members across all loyalty programs.
Total Liability	This infolet provides the total liability of all loyalty programs for the implementing organization.

For more details on configuring the infolets, see Oracle CX Sales - Creating and Administering Analytics.

In addition, the infolets in the following table are available by default as embedded analytics in the Member Detail page for the loyalty marketing manager and loyalty program administrator roles.

Loyalty Infolet	Description
Number of Available Vouchers	This infolet provides the number of vouchers available to be redeemed and indicates how quickly and effectively vouchers are being utilized by the member.
Number of Referrals	This infolet provides the number of members referred by the member in of the program up to the current date. It indicates the effectiveness of the referral promotions and the involvement of the member in the member's activity in creating a member network.

For more details on creating and editing infolets that are embedded, see Oracle CX Sales - Creating and Administering Analytics.

Related Topics

- Oracle CX Sales - Creating and Administering Analytics

Enable the Loyalty Infolet Pages

You enable the Loyalty Infolet Page for each individual loyalty role in your organization.

To enable the Loyalty Infolet Pages:

1. Open Tools, and then select Structure.
2. In Structure, select Set System Options.
3. In Set System Options select Social Panel and Loyalty Infolets.

4 Work with Prebuilt Loyalty Analytics

Review Prebuilt Loyalty Analytics

Loyalty analytics comes with prebuilt analytics designed specifically for the following loyalty roles:

- Loyalty marketing managers. This role is responsible for creating the loyalty program and for authoring loyalty promotions for member engagement.
- Loyalty program managers. This role is responsible for administering the loyalty program.

Note: It is recommended to avoid permanently deleting Point Types from Programs as this might cause data discrepancy in OTBI Reports.

Edit Prebuilt Loyalty Analyses

You can edit prebuilt analytics in BI by selecting a directory and then selecting Edit when the contents appear in the pane. The analysis opens in another window for editing.

To edit a prebuilt loyalty analysis:

1. Open Tools and then select Reports and Analytics.
2. In Reports and Analytics, click Browse Catalog and then in the Folders section of the Catalog window, navigate to the folder where the Loyalty prebuilt analyses are provided.

   For example, Shared Folders > Loyalty > Embedded Content > Loyalty Program Manager > Dashboards.
3. Select an analysis you want to edit in BI, for example Loyalty - Member Insights.
4. Edit the analysis.
5. Select columns from the Subject Area pane that you want to appear on the editing palette.
6. Click the gear icon for editing options, for example filtering and deleting that column from the analysis.

Prebuilt Loyalty Analyses

The following table lists the analyses designed for loyalty marketing managers and loyalty program administrators to evaluate how aspects of their loyalty programs are doing against the targets.

Report Title	Report Description	Column Description
Loyalty - Accruals and Redemptions Trend	Shows the transactions (the accruals and redemptions) over time for different programs. With this report, you can analyze the transaction trends for a particular loyalty program over a given period, for example, for one year.	Shows information as a line chart as follows: • X-Axis: Month The months of the selected years. • Y-Axis: Transactions

Report Title	Report Description	Column Description
	The input parameters are: • Program (single-select). The default is the last created program; however, you can select any listed program. • Year (single-select) By default, the report selects the current year; however, you can select individual years.	The number of accrual and redemption transactions in the month.
Loyalty - Active Members by Redemptions	Shows the most active members by the last redemption transaction date. Use this report to analyze member engagement. The input parameters are: • Program (single-select) The default is the last created program; however, you can select any listed program. • Top N (5, 10, 20, 50) Selects the number of records to display as the top N dimensions on chart based on the revenue generated. The default is 10.	Shows information as a tabular report with the following columns: • Member Name • Joined Date • Last Redemption On
Loyalty - Churn Analysis	Shows the member churn rate, which is the rate at which members are leaving a Loyalty program. Use this report to review the member churn rate and to visualize the rate at which members are leaving the program The report provides a count of all members who have left the program at the end each period, and includes the members who have become inactive or canceled. The input parameters are: • Program (single-select) The default is the last created program; however, you can select any listed program. • Year (multi-select) The default is the current year; however, you can select other available years. • Show View (single-select)	Shows information as a graphical line chart or a bar chart with the following information: • X-Axis: the Year and month for each record in YYYY/MM format with the legend as Month. • Y-Axis: Churn Rate (%) The report shows Churn Rate as a percentage of members who became inactive over the period relative to members who were active at the start of the period. The rate is either in the form of discrete bars for each month in the bar chart or as a connected line graph for each month in the line chart.

Report Title	Report Description	Column Description
	The default is Line Graph; however, you can select either Line Graph or Bar Graph.	
Loyalty - Member Insights	Shows the distribution of members by tier, member status, geography, and referral status. The following views are available: • By Tier This is the default view. • By Status • By Referral Status • By State The input parameter is: • Program (single-select) The default is the last created program; however, you can select any listed program.	Shows information as a bar chart as follows: • X-Axis: Tier, Member Status, Referral Status, or State • Y-Axis: Members
Loyalty - Member Revenue By Tier	Shows the member revenue by tier for the tier class. The input parameters are: • Program (single-select) The default is the last created program; however, you can select any listed program. • Year (multi-select) The default is the current year; however, you can select other available years.	Shows information as a bar chart as follows: • X-Axis: Tier Name Ordered by tier-level from lower to higher tier. • Y-Axis: Member Revenue
Loyalty - Member Revenue by Various Dimensions	Shows the member revenue for a given loyalty program for partners or products. Use this report to review the member revenue by various dimensions, for example, partners and products, and to understand the dimensions that bring in revenue to the program. The input parameters are: • Program (single-select) The default is the last created program; however, you can select any listed program. • Top N (5, 10, 20, 50)	Shows information as a line chart as follows: • X-Axis: The selected dimension, either Product or Partner. • Y-Axis: Total Revenue The total revenue obtained through the selected dimension, either Product or Partner, in the form of a connected line graph for each record of the dimension. **Note:** Only processed transactions are considered when calculating member revenue.

Report Title	Report Description	Column Description
	Selects the number of records to display as the top N dimensions on chart based on the revenue generated. The default is 10. • Dimension The default is Partner; however, you can select either Partner or Product.	

Loyalty - Member Tier Changes	Shows the activity of members over time as they move up or down tiers by displaying the count of all member tier changes for each tier class at the end each period. Use this report to review the activity over time and understand the volume of members moving up and down tiers.
	
	The input parameters are:
	• Program (single-select)
	The default is the last created program; however, you can select any listed program.
	• Year (multi-select)
	The default is the current year; however, you can select other available years.
		Shows information as a bar chart with the following information:
		• X-Axis: Tier
		The report presents the tier levels in ascending order from the lowest tier to the highest tier.
		• Y-Axis: Members
		The number of member tier movements that moved from:
		  ◦ The lower to higher tier
		  ◦ The higher to lower tier
		
		Note: The count of member tier changes excludes members who have closed their membership accounts.

Loyalty - Member Tier Movement	Shows the activity of members over time as they move up or down tiers by displaying the count of all member tier changes for each tier class at the end each period. Use this report to review the activity over time and understand the volume of members moving up and down tiers. The input parameters are: • Program (single-select) The default is the last created program; however, you can select any listed program. • Year (multi-select) The default is the current year; however, you can select other available years.	Shows information as a tabular chart with the following columns: • Tier Name The tier names are presented in descending order from the highest tier to the lowest tier. • Moved to a Higher Tier • Moved to a Lower Tier • Average Days to Move to a Higher Tier • Average Days to Move to a Lower Tier **Note:** The count of member tier changes excludes members who have closed their membership accounts.
Loyalty - Members at Risk	Shows the members who are at risk of leaving the loyalty program based on how recent their transactions are. Use this report to identify all members: • Whose last accrual transaction date and last redemption transaction	Shows information as a tabular report with the following columns: • Member Name

Report Title	Report Description	Column Description
	date is more than 6 months earlier than the current date, • Who have at least one expired point, • Who have a joining date greater than a year from the current date. The input parameter is Program (single-select). The default is the last created program; however, you can select any listed program.	**Note:** Member Name includes members with Active, Dormant, Payment Pending, and Potential Fraudulent member status, and excludes all members with a Canceled, Inactive, and Merged member status. Member Name also includes all customer added status labels. • Tier Name • Last Accrual Date • Last Redemption Date You can sort this column in ascending or descending order. • Points Expired **Note:** The report sorts the table using the Tier Sequence Number.
Loyalty - Members By Referrals	Shows the distribution of members by member referral. The input parameter is Program (single-select). The default is the last created program; however, you can select any listed program.	Shows information as a pie chart where members are segmented by information from the following columns: • Referral • Nonreferral.
Loyalty - Members by Transaction Recency	Shows the distribution of members by their most recent transactions. The input parameter is Program (single-select). The default is the last created program; however, you can select any listed program.	Shows information as a tabular report with the following columns: • Recency Criteria For example, within the last 30 days. • Number of Members The number of members that have met the criteria.
Loyalty - Membership Trend	Shows the total loyalty membership and distribution of members by member status by month. The following views are available: • Total Membership Trend This is the default view. • Membership Status Trend	Shows information as a bar chart as follows: • X-Axis Month The report shows the year and month as YYYY/MM. • Y-Axis: Members

Report Title	Report Description	Column Description
	The input parameters are: - Program (single-select) The default is the last created program; however, you can select any listed program. - Year (multi-select) The default is the current year; however, you can select other available years.	The number of members depending on the selected view: - Total Membership Trend Shows the number of total members over time. - Membership Status Trend Shows the number of members distributed by status such as Active, Inactive, Canceled, and so on, over time. - X-Axis: Month - Y-Axis: Members
Loyalty - New Enrollments **Note:** This report is available only through the Members Dashboard.	Shows the new enrollments in a loyalty program over a specific time period and analyzes the rate of member enrollment into each program. Use this report to review the new enrollments over time and visualize the enrollment trend for each program. The input parameters are: - Year (multi-select) The default is the current year; however, you can select other available years. - Program Type (multi-select) The default is all programs; however, you can select a specific program by the program name.	Shows information as a multiline chart, and alternatively as a bar chart, as follows: - X-Axis: Can be one of the following: - Year. Segmented by the total at the end of each month. - Quarter. Segmented by the total at the end of each week. - Month. Segmented by the total at the end of each day. - Y-Axis: # of New Members The count of all new member enrollments at the end of each period, segmented by time and tier.
Loyalty - Partner Point Balance - Details	Shows the point statistical trends for transactions attributed to the selected partner in a given time period, for example, one year. Use this report to view and analyze the point trends for partner transactions for a given time period. For example, if you have launched four different loyalty programs, then using this report, you can select a single program out of the four programs along with the year of reference, to analyze the point statistic trends for each month in the selected year. The input parameters are: Program (single-select) The default is the last created program; however, you can select any listed program.	Shows information as a stacked multi-bar chart as follows: - X-Axis: Year and month presented as YYYY/MM. - Y-Axis: Points, which include the following: # of Points Accrued # of Points Redeemed # of Points Expired # of Points Available Balance **Note:** The point statistics include the number of points accrued, the number of points redeemed, the number of points expired, and the available point balance.

Report Title	Report Description	Column Description
	• Year (single-select) The default is the current year; however, you can select other available years. • Partner Name (single-select)	
Loyalty - Partner Promotions	Shows all promotions and points accrued through a promotion for a given partner. With this report, you can analyze the effectiveness of each promotion run by the partners over the lifetime of the promotion. **Note:** The transactions don't include enrollment and referral transactions because these transactions are automatically triggered after an enrollment and referral has been made. The input parameter is: • Partner Name (single-select) The default Partner Name is the partner with maximum number of points that have been accrued across promotions; however, you can select other available partners.	Shows information as a tabular report with the following columns: • Partner Name . • Promotion Name • Number of Points Accrued For example, if you have multiple partners associated with different programs, using this report, you can select a single partner and list all the promotions created by the partner as well as the overall points accrued by that partner.

Loyalty - Partner Revenue - Trend Chart	Shows the quarterly revenue trend for comparison between selected partners in a particular loyalty program for a given time period, for example, one year. With this report, you can compare the revenue generated by different partners for a particular loyalty program on a quarterly basis for a period of a year.
	
	For example, if you have launched 4 different Loyalty programs, then you can select a single program out of the 4 programs along with the year of reference and the partners to compare, and then compare the revenue generated by selected partners over the year of reference split by quarters.
	
	The input parameters are:
	• Program (single-select).
	The default is the last created program; however, you can select any listed program.
	• Year (single-select)
		Shows information as a multi-line chart as follows:
		• X-Axis: Quarter
		Quarter is presented as YYYY Q N
		  ◦ Year and quarter number
		  ◦ Partners selected
		• Y-Axis: Revenue
		The partner revenue (in dollars)
		Note: Only processed transactions are considered in the revenue calculation.

Report Title	Report Description	Column Description
	By default, the current year is selected; however, you can select individual years. • Partner Name (multi-select) By default, all partners are selected; however, you can select individual partners to a maximum of 10 partners.	
Loyalty - Partner Transactions	Shows the partner transaction trends, such as the trends for accruals and transactions for a loyalty program over a time period, for example, one year. Use this report to view and analyze trends in partner transactions such as accruals and redemptions, for a program over a time period. For example, if you have launched four different loyalty programs, then using this report, you can select a single program out of the four programs along with the year of reference, to analyze the partner transaction trends for accruals and redemptions over the for each month in the selected year. The input parameters are: • Program (single-select) The default is the last created program; however, you can select any listed program. • Year (single-select) By default, the current year is selected; however, you can select individual years. • Partner Name (single-select) The default partner is the first partner in the list, which is in alphabetic order; however, you can select other available partners.	Shows information as a multiline chart as follows: • X-Axis: Month The months of the year, presented as YYYY/MM • Y-Axis: Transactions The report organizes the transactions by accrual and redemption transactions. **Note:** The transactions don't include enrollment and referral transactions because these transactions are automatically triggered after an enrollment and referral has occurred.
Loyalty - Points Expired	Shows the points expired and member balances against each tier for a given point type. Use this report to review the points expired and the remaining point balances for each tier. The input parameters are: • Program (single-select) The default is the last created program; however, you can select any listed program.	Shows information as a tabular report with the following columns: • Tier Name The tiers are sorted in ascending sequence. • # of Points Expired • Member Points Balance The total point balance for all members in the tier.

Report Title	Report Description	Column Description
	• Point Type (multi-select) By default, the report displays all point types; however, you can select individual points types associated with the program.	
Loyalty - Points Expiring	Shows the points expiring for all tiers in a given tier class within incremental time frames (week, month, or quarter), from the current time of reference. Use this report to review the points expiring in the next 7 days (week), next 30 days (month) and next 90 days (quarter). The input parameters are: • Program (single-select) The default is the last created program; however, you can select any listed program. • Show View (single-select) The default is Bar Chart; however, you can select either Bar Chart or Table. For example, the expired points returned for: • The Next 7 Days report generated on Jan. 16th are those points expiring between Jan. 16, 2018 and Jan. 23, 2018. The Points Expiring report is in the form of a sliding window, which moves based on the current date when the report is populated. • The Next 30 Days report generated on Jan. 16th are those points expiring between Jan. 16, 2018 and Feb. 16, 2018, from the next day to the current date for the next month. • The Next 90 Days report generated on Jan. 16th, are those points expiring between Jan. 16, 2018 and Apr. 16, 2018, from the next day to the current date after 3 months.	Shows information as a horizontal bar chart as follows: • X-Axis: Points The points that are expiring in the next 7 days, next 30 days, or next 90 days. • Y-Axis: Tier Name The report sorts the tiers in ascending sequence. The report also shows information as a tabular report with the following columns: • Tier Class Name • Tier Name • Within Next 7 days • Within Next 30 days • Within Next 90 days
Loyalty - Points Liability Trend	Shows the trend of the primary point count for a given loyalty program or for all loyalty programs over a specific time period. Use this report to review the point activity over time to visualize the total change in point liability.	Shows information as a line chart or a bar chart as follows: • X-Axis: Month The report presents the month and year as YYYY/MM • Y-Axis: Points The count of all primary points at the end each quarter..

Report Title	Report Description	Column Description
	The input parameters are: • Program (single-select) The default is the last created program; however, you can select any listed program. • Year (multi-select) The default is the current year; however, you can select other available years. • Show View (single-select) The default is Line Graph; however, you can select either Line Graph or Bar Graph.	
Loyalty - Primary Points Accrual, Redemption, Expiration and Point Balance Trend	Shows the primary point accrual, redemption and expiration, and point balance trends for a given loyalty program over a specific time period. Use this report to review the activity over time to understand the relative points activity. The input parameters are: • Program (single-select) The default is the last created program; however, you can select any listed program. • Year (multi-select) The default is the current year; however, you can select other available years. • Show View (single-select) The default is Line Graph; however, you can select either Line Graph or Bar Graph.	Shows information as a multi-line chart and alternatively as a bar chart as follows: • X-Axis: Month The report presents the month and year as YYYY/MM • Y-Axis: Points The report displays the accruals, redemptions, and expiration point counts as well as point balance. The values start at 0 at the origin, and are scaled to encompass all values up to the next major increment above the peak value of points, redemptions, and points expired.
Loyalty - Program KPIs	Shows the current status of the loyalty program's key performance indicators (KPI) to understand the program's success by analyzing members' point earning and redemption velocities. Use this report to understand the velocity with which members are earning and burning points. The loyalty program KPI's that are displayed are for the last completed quarter. For example, if today's date is April 10, 2018, then the data displayed will be for Q1 2018, or Quarter 1 of the year 2018. The input parameters are: • Program (single-select)	Shows information as a summary report with the following entries: • # of Members The number of members enrolled into the loyalty program as of the last completed quarter. • # Inactive Members The number of members that are inactive as of the last completed quarter. • Enrollment Growth Rate The growth rate of the last completed quarter as compared to the previous quarter. • # of Points Accrued

<table>
<tr><th>Report Title</th><th>Report Description</th><th>Column Description</th></tr>
<tr><td></td><td>The default is the last created program; however, you can select any listed program.
Point Type (single-select)
By default, the report displays all point types for the program. It displays the primary point type in brackets, for example, if Base is the primary point type, then the report displays Base (Primary).</td><td>The total number of points that members have accrued.
# of Points Redeemed.
The total number of points that members have redeemed.
# of Points Expired.
The total number of points that have expired.
Points Earning Rate
The earnings rate for the last completed quarter compared to the previous quarter. The report calculates the rate as:
<code>(#Points Accrued/Member Point Balance) * 100</code>
Points Burning Rate
The rate of points redemption for the last completed quarter compared to the previous quarter. The report calculates the rate as:
<code>(#Points Redeemed/Member Point Balance) * 100</code>
Expiration Rate
The points expiration rate for the last completed quarter compared to the previous quarter. The report calculates the rate as:
<code>(#Points Expired/Member Point Balance) * 100</code></td></tr>
<tr><td>Loyalty - Program Liability Trend</td><td>Shows the monetary liability of a loyalty program, based on the outstanding point balance and the cost for each point. The report calculates monetary liability as follows:

<code>Outstanding Point Balance * Cost per Point</code>

Use this report to analyze the monetary liability of the program based on the outstanding point balance and cost for each point.

The input parameters are:
Program (single-select)
The default is the last created program; however, you can select any listed program.
Year (multi-select)</td><td>Shows information as a bar chart as follows:
X-Axis: Quarter
The report presents the month and year as YYYY/MM
Y-Axis: Program Liability
The program liability in dollars.
For example, if you have launched 4 different Loyalty programs, then you can select a single program out of the 4 Loyalty Programs along with the year of reference to analyze the program liability for each quarter for the selected year.</td></tr>
</table>

Report Title	Report Description	Column Description
	The default is the current year; however, you can select other available years.	
Loyalty - Program Revenue YoY	Shows the loyalty program revenue for different years for comparison across quarters. Use this report to review the quarterly revenue generated by a program year-on-year. The input parameters are: • Program (single-select) The default is the last created program; however, you can select any listed program. • Year (multi-select) The default is the current year; however, you can select other available years.	Shows information as a multiline chart as follows: • X-Axis: Quarters (in the year) • Y-Axis: Total Revenue The revenue generated by all active members in the program, by quarter, for each year selected. **Note:** Only processed transactions are considered for revenue calculation. In addition, members who have closed their accounts aren't included in the revenue calculation.
Loyalty - Programs at a Glance	Shows all the loyalty programs and their current metrics and Key Performance Indicators (KPIs) for comparison and decision-making purposes. Use this report to understand how the programs are functioning and to monitor the progress and success of a program. There are no input parameters for this report.	Shows information as a tabular report with the following columns: • Program Name • Start Date • Accrued Points The total number of points accrued for all the members for each loyalty program for all point types. • Redeemed Points The total number of points redeemed for all the members for each loyalty program for all point types. • Expired Points The total number of points expired for each loyalty program for all point types. • Transactions The total number of transactions for all members for each loyalty program. • Total Revenue The total revenue for all members for each loyalty program. **Note:** The report only includes processed transactions in the revenue calculation.

<table>
<tr><th>Report Title</th><th>Report Description</th><th>Column Description</th></tr>
<tr><td>Loyalty - Redemption Velocity</td><td>Shows how fast members are redeeming their points in a given loyalty program, which is expressed as a burn rate. Use this report to review and visualize the redemption activity and velocity over time.

Note: The count of all primary points at the end each period excludes points for members that have closed their membership accounts.

The input parameters are:
Program (single-select)
The default is the last created program; however, you can select any listed program.
Year (multi-select)
The default is the current year; however, you can select other available years.
Show View (single-select)
The default is Line Graph; however, you can select either Line Graph or Bar Graph.</td><td>Shows information as a line chart and alternatively as a bar chart, as follows:
X-Axis: Month
The report presents the month and year as YYYY/MM
Y-Axis: Burning Rate (%)
The rate at which members are redeeming their points expressed as a percentage.</td></tr>
<tr><td>Loyalty - Revenue by Partner</td><td>Shows the revenues generated by different partners for a loyalty program. Use this report to view the revenues generated by different partners in a loyalty program.

The input parameters are:
Program (single-select)
The default is the last created program; however, you can select any listed program.
Partner Name (multi-select)
By default, all partners are displayed. You can select a maximum of 10 partners for revenue comparison.
Show View (single-select)
The default is Line Chart; however, you can select either Line Chart or Bar Chart.</td><td>Shows information as a line chart or a bar chart as follows:
X-Axis: Partner Name
Y-Axis: Revenue (dollars)
For example, if you have launched four different loyalty programs, then you can select a single program out of the four programs along with multiple partners under the selected program to compare the revenues generated by these partners over the lifetime of the program.</td></tr>
<tr><td>Loyalty - Revenue Influenced by Program</td><td>Shows the revenue influenced by the loyalty program over a selected time period.</td><td>Shows information as a bar chart as follows:
X-Axis: Quarter</td></tr>
</table>

Report Title	Report Description	Column Description
	The input parameters are: • Program (single-select) The default is the last created program; however, you can select any listed program. • Year (multi-select) The default is the current year; however, you can select other available years.	The report displays the year and quarter as YYYY Q n. • Y-Axis: Member Revenue
Loyalty - Top N Partners by Revenue	Shows the top partners for a loyalty program sorted by the revenue generated. Using this report, you can list and analyze the top partners for a program in terms of revenue generated through partner products or services. The input parameters are: • Program (single-select) The default is the last created program; however, you can select any listed program. • Top N (5, 10, 20, 50) Selects the number of records to display as the top N dimensions on chart based on the revenue generated. The default is 10.	Shows information as a tabular report with the following columns: • Partner Name • Revenue Revenue over the lifetime of the program, in dollars. You can sort the revenue in ascending or descending sequence. **Note:** The report only considers processed transactions when calculating revenue. For example, if you have launched 4 different Loyalty programs, then you can select a single program out of the 4 programs and the top 5 partners for revenue generated. The report lists the revenue generated through these partners for that program in descending order by default.
Loyalty - Top N Promotions by Earning Rate	Shows the top influential promotions for a Loyalty program by the earning rate. With this report, you can review promotions over time to understand the top performing promotions. The input parameters are: • Program (single-select) The default is the last created program; however, you can select any listed program. • Year (single-select) The default is the current year; however, you can select other available years. • Top N (5, 10, 20, 50) Selects the number of records to display as the top N dimensions	Shows information as a tabular report with the following columns: • Promotion Name • Earning Rate (%) The report sorts promotions from the highest to lowest earnings rate.

Report Title	Report Description	Column Description
	on chart based on the revenue generated. The default is 10.	
Loyalty - Top N Redemption Products	Shows the top redemptions by product, ranked by the number of redemptions. The input parameters are: • Program (single-select) The default is the last created program; however, you can select any listed program. • Year (multi-select) The default is the current year; however, you can select other available years. • Top N (5, 10, 20, 50) Selects the number of records to display as the top N dimensions on chart based on the revenue generated. The default is 10.	Shows information as a tabular report with the following columns: • Product Name • Number of Redemptions
Loyalty - Top N Referral Sources	Shows the top referral sources, ranked by the number of members referred. The input parameters are: • Program (single-select) The default is the last created program; however, you can select any listed program. • Top N (5, 10, 20, 50) Selects the number of records to display as the top N dimensions on chart based on the revenue generated. The default is 10.	Shows information as a tabular report with the following columns: • Referral Source Name • Referral Source Member Number • Members
Loyalty - Transactions by Status **Note:** This report is available only through the Transactions Dashboard.	Shows the number of transactions grouped by status for each day for the last week. The input parameters are: • Program (single-select) The default is the last created program; however, you can select any listed program. • Year (multi-select) The default is the current year; however, you can select other available years.	Shows information as a bar chart as follows: • X-Axis: Day The report shows the past 7 days from the current day. • Y-Axis: Transactions The number of transactions grouped by transaction status , such as, New, In Process, Rejected, and Completed.

Report Title	Report Description	Column Description
Loyalty - Transactions by Tier	Shows the accrual and redemption transactions by member tier. The input parameters are: • Program (single-select) The default is the last created program; however, you can select any listed program. • Year (multi-select) The default is the current year; however, you can select other available years. • Show View The default view is Transactions; however, you can select either the Transactions or the Accrual and Redemption view.	For the Transactions view, the report shows information as a pie chart segmented by information from the following columns: • Number of Transactions • Tier Name For the Accrual and Redemption view, the report shows information as a line chart for each tier, with the following information: • X-Axis: Months The report shows the years and months as YYYY/MM. • Y-Axis: Transactions The number of transactions for each tier level.
Loyalty - Transactions by Type	Shows the number of accrual and redemption transactions for each month The input parameters are: • Program (single-select) The default is the last created program; however, you can select any listed program. • Year (multi-select) The default is the current year; however, you can select other available years.	Shows information as a bar chart as follows: • X-Axis: Month The report shows the years and months as YYYY/MM. • Y-Axis: Transactions The number of transactions broken down by transaction type, such as, Accruals and Redemptions.
Loyalty - Vouchers Trend	Shows the number of vouchers awarded to members over time. The input parameters are: • Program (single-select) The default is the last created program; however, you can select any listed program. • Year (multi-select) The default is the current year; however, you can select other available years.	Shows information as a bar chart as follows: • X-Axis: Month The report shows the years and months as YYYY/MM. • Y-Axis: Vouchers: Shows the number of vouchers broken down by voucher statuses, such as Available, Expired, Reissued, and so on, at the end each month.
Loyalty Partners - Prepaid Partner Point Usage Trend	Displays the trend of the prepaid partner's point usage for a particular program for a specific time period viewed by: • Partner	Shows information as a line chart as follows: • X-Axis: Month

Report Title	Report Description	Column Description
	• Point type **Note:** This report requires the Points Usage Real Time Subject Area, which only provides data related to prepaid partners. The input parameters are: • Program (single-select) The default is the last created program; however, you can select any listed program. • Criteria (single-select) You can select either "By Partner" or "By Point Type". • Partner Name (multi-select). Available only if you select "By Partner" for Criteria. By default, the report displays all partners for the selected program. You can select a maximum of 10 partners. When you select a particular partner, the report displays the trend for point blocks for different point types. • Point Type (multi-select). Available only if "By Point Type" is selected for Criteria. All point types related to the prepaid partner are displayed. When you select a point type, the trend for partners are displayed having point blocks of the selected point type. • Year (single-select) The default is the current year; however, you can select other available years.	The month for the year. In addition, the legend for the prepaid partners or point types. • Y-Axis: The prepaid partner points used, shown either by partner or by point type for the selected program. This trend report aggregates all the utilized points in point blocks of a particular point type of the selected prepaid partner, for a selected program.. It uses the conversion rate for the prepaid partner and shows the partner points utilized for the specified time period. **Note:** This report displays only the number of points utilized from the point blocks and doesn't display any top up or refills of points done by the partner in the specific period under consideration.
Loyalty Partners - Reward Cost of Partner Products	Displays the points for products rewarded to the loyalty program members through partners. The report measures the points of the rewarded partner products for a particular program over a specific time period. With this report, you can: • Track the reward cost of all the partner products provided to loyalty members by your organization to estimate the future requirements and budget accordingly. • Compare the liability across different partners and check the return on investment in order to	Shows information as a line chart displaying the points for all products rewarded through all partners of the selected loyalty program, as follows: • X-Axis: Quarter The quarter for the year are presented as: YYYY Qr In addition, the legend for the partners. • Y-Axis: The points for all products rewarded through the partners of the selected program.

Report Title	Report Description	Column Description
	focus or to make business decisions on certain partners. The input parameters are: • Program (single-select) The default is the last created program; however, you can select any listed program. • Partner Name (multi-select) By default, the report displays all partners. You can select a maximum of 10 partners for revenue comparison. • Point Type (multi-select) By default, all point types are displayed; however, you can select individual points types associated with the program. • Year (single-select) The default is the current year; however, you can select other available years.	Alternatively, the report shows information as a bar chart. **Note:** The host organization assigns points in this report to the partner products that it rewards to its members and not the partner points or currency based on the terms and conditions between the partner and the host organization.

5 Work with Prebuilt Dashboards

Create and Edit Dashboards

You can create and edit dashboards to determine their content and layout. In addition to objects in the business intelligence (BI) catalog, such as analyses, reports, and prompts, you can add text, sections, and more to a dashboard.

Create a Dashboard

To create a dashboard:

1. Open the Reports and Analytics work area, or the Reports and Analytics panel tab if available in other work areas.
2. Click Browse Catalog.
3. Click New and select Dashboard.
4. Enter the dashboard's name and description, and select a folder in which to save it.
5. With the Add content now option selected, click OK.
6. Optionally, add more pages, or tabs, within the dashboard.
7. Move items from the Dashboard Objects or Catalog pane to add content to a page.
8. Click Save.

It's worth noting that BI saves the first dashboard page with the page 1 name by default. To rename this page:

1. Click the Catalog link.
2. In the Folders pane, select your dashboard.
3. For page 1, click More and select Rename.
4. Enter the new name and click OK

Edit a Dashboard

To edit a dashboard:

1. Open the Reports and Analytics work area, or the Reports and Analytics panel tab if available in other work areas where you can find the dashboard.
2. Select your dashboard in the pane and click More.
3. Click Edit.
4. Perform steps 5 and 6 from the preceding Creating Dashboards task, and make other changes as needed, for example:
   - Remove content from the dashboard.
   - Move items within a page to move content around.
   - Change the layout of a page.

Prebuilt Loyalty Dashboards

The following table lists the dashboards that are designed for loyalty marketing managers and loyalty program administrators to evaluate how aspects of their loyalty initiatives are faring against expectations and targets. For details of the reports contained in the dashboards, see the topic Prebuilt Loyalty Analyses.

Dashboard Name	Description
Loyalty Cloud Dashboard	This screen is an aggregation of various loyalty dashboards, which provide users with a one-stop view of the efficiency of various elements of the loyalty initiatives undertaken by the organization. The included dashboards are: • Member • Transaction
Member Dashboard	This dashboard displays the important prebuilt analyses for all members of a particular program to provide the user with a general perspective of member performance, activities and behavior. This dashboard includes the following prebuilt analyses: • Members by Tier This report is a subset of the "Loyalty - Member Insights" report described in the "Prebuilt Loyalty Analyses" topic. • Members by Referral Status This report is a subset of the "Loyalty - Member Insights" report described in the "Prebuilt Loyalty Analyses" topic. • Member by State This report is a subset of the "Loyalty - Member Insights" report described in the "Prebuilt Loyalty Analyses" topic. • Members by Status This report is a subset of the "Loyalty - Member Insights" report described in the "Prebuilt Loyalty Analyses" topic. • Distribution of Members by Transaction Recency This report corresponds to the "Loyalty - Members by Transaction Recency" report in the "Prebuilt Loyalty Analyses" topic. • Members at Risk • Member Revenue by Top Partners This report is a subset of the "Member Revenue by Various Dimensions" report described in the "Prebuilt Loyalty Analyses" topic. • Member Revenue by Top 10 Products This report is a subset of the "Loyalty - Member Revenue by Various Dimensions" report described in the "Prebuilt Loyalty Analyses" topic. • Active Members by Redemptions • New Enrollments • Total Membership Trend This report is a subset of the "Loyalty - Membership Trend" report in the "Prebuilt Loyalty Analyses" topic.

Dashboard Name	Description
	• Membership Status Trend This report is a subset of the "Loyalty - Membership Trend" report in the "Prebuilt Loyalty Analyses" topic. • Churn Analysis • Member Tier Movement • Member Tier Changes • Member Revenue by Tier
Transaction Dashboard	This dashboard displays the important prebuilt analyses for all transactions of a particular program to provide users with a general perspective of the recency, frequency, and monetary aspects of the activities performed by the member. This dashboard includes the following prebuilt analyses: • Accruals and Redemptions Trend • Transactions by Type • Transactions by Tier • Transactions by Status (Last 7 days) • Primary Points Accrual, Redemption and Expiration Trends • Redemption Velocity • Points Expiring • Points Expired • Vouchers Trend • Points Liability Trend

Related Topics

- Prebuilt Loyalty Analyses