

Standard Reports Manual



About this Document...

The iCare Standard Report Manual is a comprehensive guide all reports that are included in the iCare Application.

Reports in this document are organized by category. This document contains the following report categories for iCare:

iCare Gift & Loyalty Reports.....	14
iCare Customer Reports	38
iCare DB & Campaigning Reports.....	69

Within each report section, an overview of the report and its purpose, the report template, a sample report, and a field description is provided.

iCare Gift, Payment, & Loyalty Reports are available for all iCare customers. Organizations with iCare and mymicros.net will have iCare Customer Reports, as well as iCare Gift and Loyalty Reports. Organization with iCare Campaigning will have access to iCare DB & Campaigns Reports.

Declarations

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Design and Production

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Printing History

New editions of this manual incorporate new and changed material since the previous edition(s). Minor corrections and updates may be incorporated into reprints of the current edition without changing the publication date or the edition number.

Edition	Month	Year	Software Version
1st	August	2008	4.4.3
2nd	January	2012	7.0

Introduction

Overview

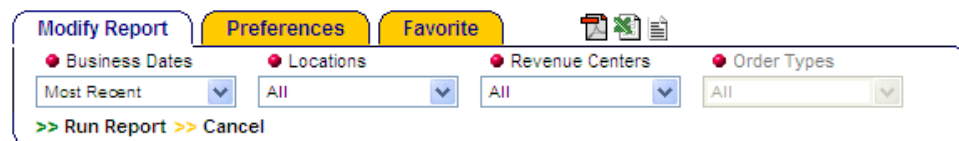
This document is intended to be an overview of all standard iCare Reports. As previously mentioned, there are three categories of iCare Reports:

1. iCare Gift & Loyalty
2. iCare Customer Reports
3. iCare Database & Campaigning Reports

Features & Functionality

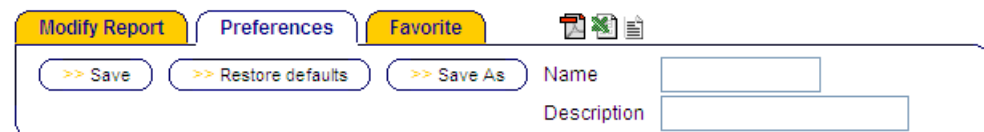
Reports can be manipulated in various ways, from specifying the time period of the information reported to the types of details found on particular reports.

On the Modify Report tab, a number of filtering methods exist.



You can filter by Business Dates, Locations, Revenue Centers (RVC), and in some circumstances, Order Types. These filtering techniques will be discussed in greater detail in the Filtering Reports section.

The Preferences Tab:



The Favorite Tab:



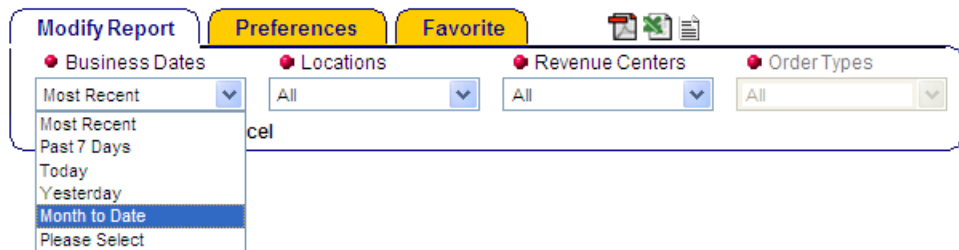
Export to Excel/PDF/Notepad:



***Modify Reports Tab* Business Dates**

You can use the drop-down list to select a the specific dates for the report to run. Options in the drop-down list include:

- ◆ Most Recent
- ◆ Past 7 Days
- ◆ Yesterday
- ◆ Financial Period to Date
- ◆ Financial Week to Date
- ◆ Today
- ◆ Month to Date
- ◆ Please Select - this will open a calendar from which to select (Power Selection)



Not all of these options will be appropriate or available for all reports. An example of this is the Today's Operations Reports. Because they are specifically reporting “today's” details, the viewing of “Month to Date” is impossible. There are many reports that are set up to display only a pre-determined period of time.

By clicking on the drop-down list heading, Business Dates, you will be directed to another page where you can free select date(s).

View Quick Select Year Month

January 2008							February 2008							March 2008							April 2008										
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S				
▶			1	2	3	4	5	▶	3	4	5	6	7	8	9	▶	2	3	4	5	6	7	8	▶	6	7	8	9	10	11	12
▶	6	7	8	9	10	11	12	▶	10	11	12	13	14	15	16	▶	9	10	11	12	13	14	15	▶	13	14	15	16	17	18	19
▶	13	14	15	16	17	18	19	▶	17	18	19	20	21	22	23	▶	16	17	18	19	20	21	22	▶	20	21	22	23	24	25	26
▶	20	21	22	23	24	25	26	▶	24	25	26	27	28	29	▶	23	24	25	26	27	28	29	▶	27	28	29	30				
▶	27	28	29	30	31			▶							▶	30	31						▶								

May 2008							June 2008							July 2008							August 2008										
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S				
▶				1	2	3	▶	1	2	3	4	5	6	7	▶		1	2	3	4	5	▶					1	2			
▶	4	5	6	7	8	9	10	▶	8	9	10	11	12	13	14	▶	6	7	8	9	10	11	12	▶	3	4	5	6	7	8	9
▶	11	12	13	14	15	16	17	▶	15	16	17	18	19	20	21	▶	13	14	15	16	17	18	19	▶	10	11	12	13	14	15	16
▶	18	19	20	21	22	23	24	▶	22	23	24	25	26	27	28	▶	20	21	22	23	24	25	26	▶	17	18	19	20	21	22	23
▶	25	26	27	28	29	30	31	▶	29	30					▶	27	28	29	30	31	▶	24	25	26	27	28	29	30			
▶								▶							▶							▶	31								

September 2008							October 2008							November 2008							December 2008										
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S				
▶		1	2	3	4	5	6	▶			1	2	3	4	▶						1	▶		1	2	3	4	5	6		
▶	7	8	9	10	11	12	13	▶	5	6	7	8	9	10	11	▶	2	3	4	5	6	7	8	▶	7	8	9	10	11	12	13
▶	14	15	16	17	18	19	20	▶	12	13	14	15	16	17	18	▶	9	10	11	12	13	14	15	▶	14	15	16	17	18	19	20
▶	21	22	23	24	25	26	27	▶	19	20	21	22	23	24	25	▶	16	17	18	19	20	21	22	▶	21	22	23	24	25	26	27
▶	28	29	30					▶	26	27	28	29	30	31	▶	23	24	25	26	27	28	29	▶	28	29	30	31				
▶								▶							▶	30						▶									

Selection

8/6/2008

>> Clear selection

v. 4.3.0.143

If your organization has created a separate financial calendar to match your fiscal year, you can select that financial calendar in View.

View

- Standard
- Financial Calendar

Click one or more dates in the calendar grid for specific dates. The selected date is highlighted in green, and that date displays in the Selection window.

Select a single day by clicking on just that day single day.

June 2006						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Select an entire week by clicking the arrow to the left of the row.

June 2006						
S	M	T	W	T	F	S
▶				1	2	3
▶	4	5	6	7	8	9
▶	11	12	13	14	15	16
▶	18	19	20	21	22	23
▶	25	26	27	28	29	30

Select the weekdays by clicking the column heading.

June 2006						
S	M	T	W	T	F	S
▶				1	2	3
▶	4	5	6	7	8	9
▶	11	12	13	14	15	16
▶	18	19	20	21	22	23
▶	25	26	27	28	29	30

Select an entire month by clicking the month name.

June 2006						
S	M	T	W	T	F	S
▶				1	2	3
▶	4	5	6	7	8	9
▶	11	12	13	14	15	16
▶	18	19	20	21	22	23
▶	25	26	27	28	29	30

Click and drag the mouse to select a date range.

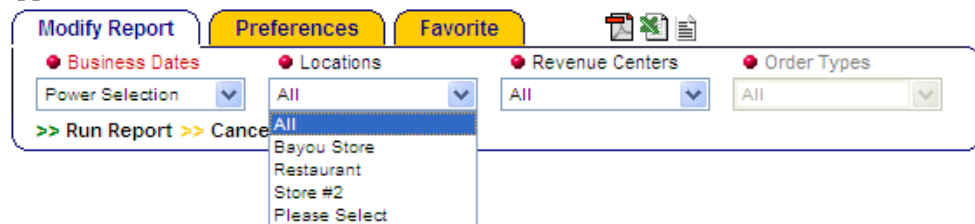
June 2006						
S	M	T	W	T	F	S
▶				1	2	3
▶	4	5	6	7	8	9
▶	11	12	13	14	15	16
▶	18	19	20	21	22	23
▶	25	26	27	28	29	30

Select a group of dates by clicking and holding Ctrl.

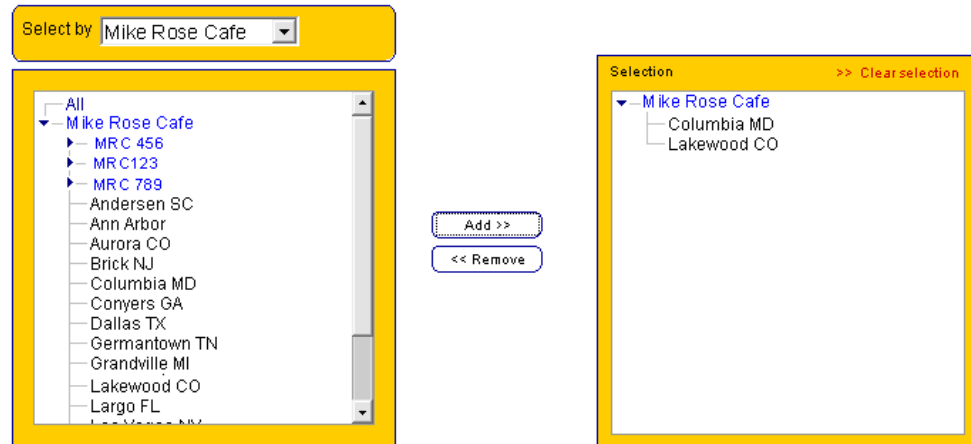
June 2006						
S	M	T	W	T	F	S
▶				1	2	3
▶	4	5	6	7	8	9
▶	11	12	13	14	15	16
▶	18	19	20	21	22	23
▶	25	26	27	28	29	30

Locations

Reports can be viewed by individual or multiple locations. Using the Locations drop-down filter, you can isolate one location for which reporting information will appear.

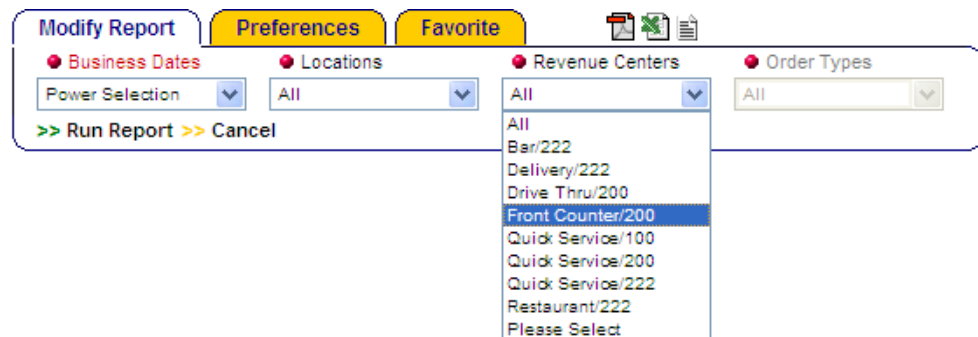


By clicking on the drop-down list heading, Locations, you will be able to select multiple locations for which the reporting information will be available. To operate the location selection page, highlight the locations to be viewed and click Add. If you made a mistake, highlight the location from the Selection box and click Remove.

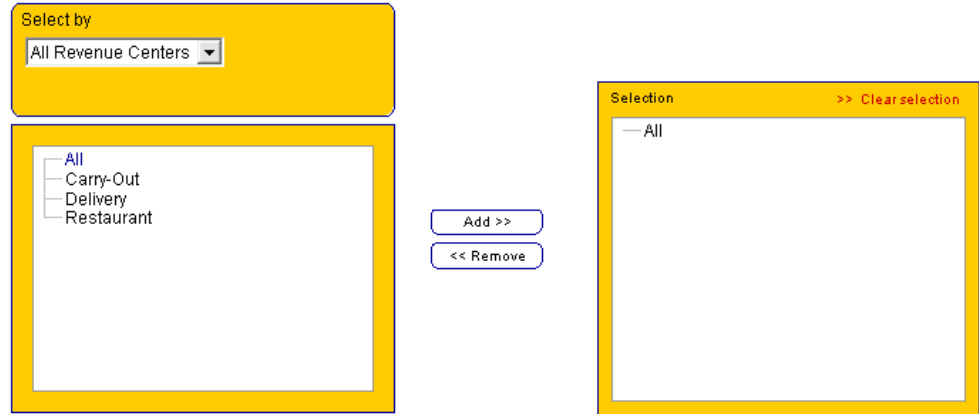


Revenue Centers

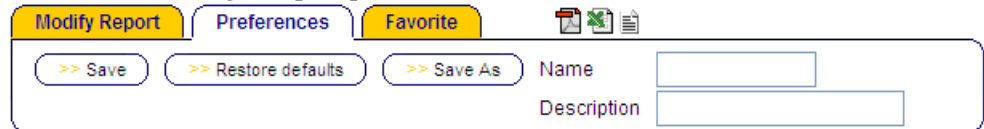
Reports can be viewed by Revenue Center (RVC) as well. Using the Revenue Center drop-down filter, you can isolate one RVC for which reporting information will appear.



By clicking on the drop-down list heading, Revenue Centers, you will be directed to another page where you can free select RVCs. To operate the RVC selection page, highlight the RVC(s) to be viewed and click Add. If you made a mistake, highlight the RVC from the Selection box and click Remove.

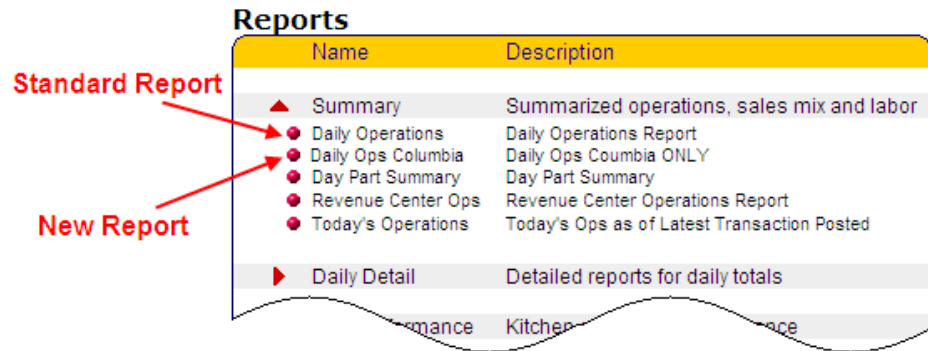


Preferences Tab You can save changed report parameters as the new default.



Select the Preferences tab on the Modify Report menu at the top of the screen. Select Save. When you select this report from the side menu in the future, it runs with the parameters you saved.

Select Save As to create a customized alternate version of this report, which displays under its own name in the Other Reports portlet.



***Favorite Tab* Set as Favorite**

You can designate specific reports as your favorites. These reports display in the Reports side menu, even if they were originally listed under More Reports. Favorite

reports are marked with a star , instead of a red ball .



Launch a report, then select the Favorite tab on the Modify Report menu. Select Set Favorite. The report displays in the side menu, with a gold star beside it.



Set a Home Report

You can select one report to be your Home Report. The Home Report launches and displays immediately whenever you log in.

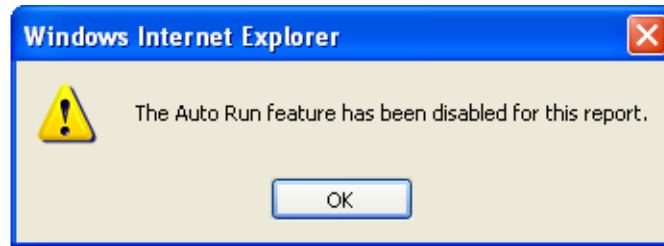


Launch a report, then select the Favorite tab on the Modify Report menu at the top of the screen. Select Set as Home Report. Each time you log in, this report will launch.

Enable/Disable Auto Run

By default, reports are always set to auto run. This means that, when a user clicks on a report, the report will “automatically run”. If you opt to disable the auto run feature, you will need to click the Run Report option every time you attempt to access the report.

This feature is only available on a report-by-report basis, meaning that you will not be able to disable the auto run feature for all reports - only one report at a time. To disable auto run, you will need to click the Disable Auto Run option. A confirmation dialog box will appear:

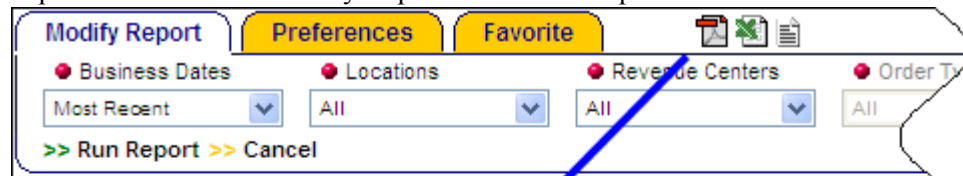


Subsequently, when you attempt to access that report in the future, you will be required to make some sort of selection, be it business date or location, and click Run Report before any report will appear:



Please make or confirm report selections and click the "Run Report" button.

Exports After a report is run, it can be exported in a variety of file formats. Select one of the export icons from the Modify Report menu at the top of the screen.



Portable Document Format (PDF)

To export in .pdf format, you must have Adobe® Acrobat® Reader®, version 5.05 or higher, installed on the PC you are using.

Select .the Adobe® Acrobat® icon and the system launches Acrobat® Reader®, loads the report as an Acrobat file, and displays the file on the PC. You can then save the file, in .pdf format, from the Acrobat® Reader® menu bar.

Adobe® Acrobat® Reader® can be downloaded without charge from Adobe Systems, Inc. at <http://www.adobe.com/products/acrobat/readstep2.html>. Acrobat® Reader® is used for all MICROS documentation, so it's a good idea to have this application loaded on your system anyway.

Earlier versions of Adobe® Acrobat® Reader® (v4, etc.) may not offer the Save feature.

Excel Workbook

To export in .xls format, you must have Microsoft® Excel 2000 or higher loaded on the PC you are using.

Select .the Microsoft® Excel icon and the system launches Excel, and displays the report as an Excel workbook file. You can then save the file in any of the formats supported by Excel: as a Microsoft® Excel workbook, as a text file (.txt), as a formatted text file (.prn), or in the format used by several other popular spreadsheet products.

Comma Separated Values

Select the Comma Separated Values icon to export in (.csv) format. The report is exported in this format to a separate browser window. You can then save this to your hard disk in hypertext (.html) or text (.txt) format.

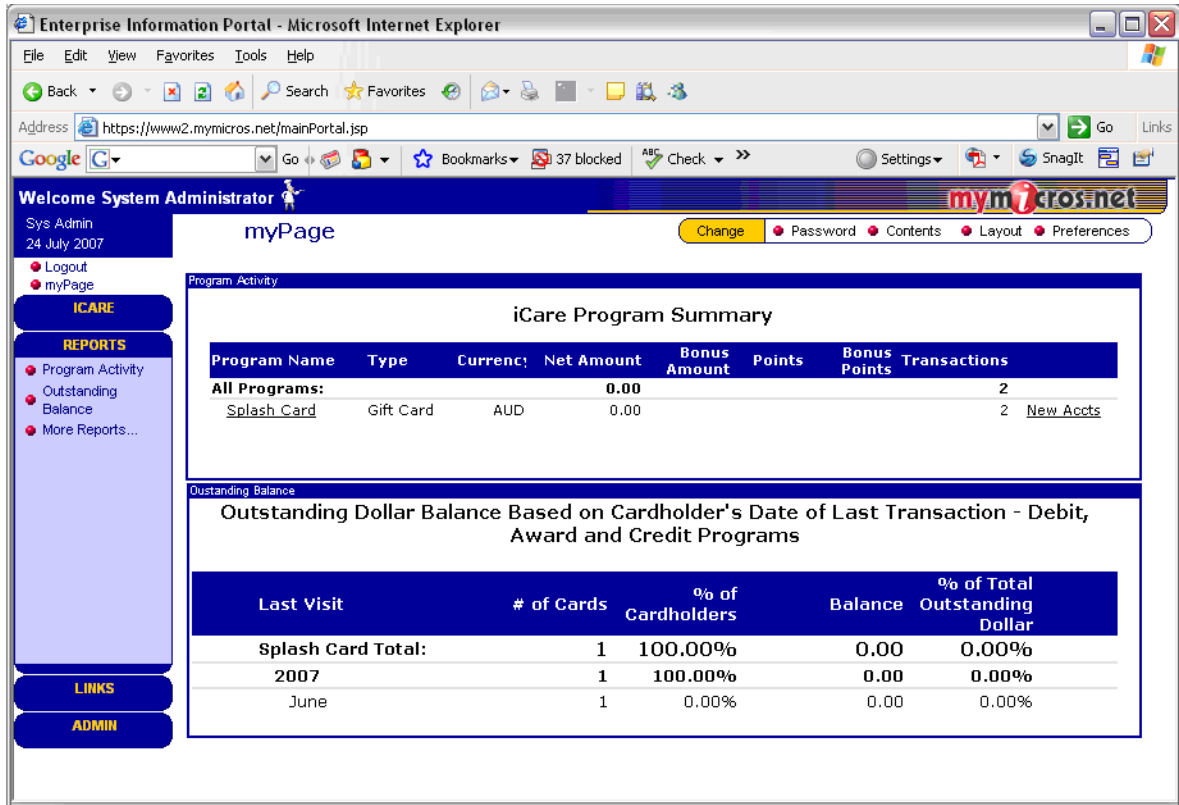
Classic vs. Lite

There are two “styles” that an iCare customer may use:

1. Classic
2. Lite

Throughout this document, you will see examples of both the lite and classic styles of page layouts. Please remember that you as the user have the ability to change your settings. Therefore, if you find the classic setting more appealing than the lite setting, or vice versa, feel free to use the Preferences option in the top menu bar to modify the setting.

Classic Appearance The Classic Appearance is generally reserved for customers who subscribe to both iCare and myMicros and is the default for myMicros users. You will notice the dark blue color scheme with orange and red accent colors. It looks similar to the following:



Lite Appearance By default, an iCare Only customer will have the Lite Style applied. The Lite has a light blue color scheme with grey and white accent colors. It looks similar to the following:

The screenshot shows a web browser window titled "Enterprise Information Portal - Microsoft Internet Explorer" with the URL "https://www.mymicros.net/core/operationsLogin.do". The page is for a "System Administrator" and displays the "myPage" interface. The main content area is titled "Outstanding Dollar Balance Based on Cardholder's Date of Last Transaction - Debit, Award and Credit Programs".

Last Visit	# of Cards	% of Cardholders	Balance	% of Total Outstanding Dollar
Gift Card Total:	16,467	100.00%	186,787.39	100.00%
2005	7,566	45.95%	88,943.64	47.62%
December	7,566	47.62%	88,943.64	47.62%
2006	4,359	26.47%	52,019.34	27.85%
January	416	1.24%	2,323.34	1.24%
February	334	1.58%	2,955.58	1.58%
March	287	1.45%	2,717.46	1.45%
April	255	1.20%	2,242.05	1.20%

Below this table is the "iCare Program Summary" section, which includes a table with the following data:

Program Name	Type	Currency	Net Amount	Bonus Amount	Points	Bonus Points	Transactions
All Programs:			(5.41)				1
<u>Gift Card</u>	Gift Card	USD	(5.41)				1 New Accts

iCare Gift & Loyalty Reports

iCare Gift & Loyalty Reports

The following reports are top level reports under the iCare Gift & Loyalty Reports Category. They may or may not have drill-down reports:

- ◆ Account Expiration Report
- ◆ Account Liability Report
- ◆ Accounts Summary Report
- ◆ Award Audit Summary
- ◆ Coupon Redemption
- ◆ Coupon Status
- ◆ iCare Exceptions Log
- ◆ Loc Reconciliation
- ◆ Outstanding Balance
- ◆ iCare Program Activity
- ◆ Rollbacks Summary

Account Expiration Report

The purpose of the iCare Account Expiration Report is to detail the expiration status for any and all selected card programs. Many times, organizations do not apply an expiration date to their Gift, Payment and Loyalty Programs. Therefore, for many programs, you will notice 0 (zeros) for the Expiration Month, Number Expired, and Expired Balance columns.

Template

- ◆ iCareAcctExpiration.xml

Example

Program	Sold Month	Exp Month	Quantity Sold	Amount Sold	Accts with Balances	% with Balances	Outstanding Balances	% Balance Outstanding	Number Expired	Expired Balance
Gift Card			36	297.02	25	69.44%	185.42	62.4%	0	0.00
	Aug 07		2	1.01	2	100.0%	1.01	100.0%	0	0.00
	Oct 07		28	234.01	18	64.3%	150.80	64.4%	0	0.00
	Nov 07		6	62.00	5	83.3%	33.61	54.2%	0	0.00

Field	Description	Table
Program Name	Displays the name of the GPL Program	ICARE_ACCOUNT
Sold Month	Specifies the months cards were sold	ICARE_ACCOUNT
Exp Month	Displays the month the card will expire	ICARE_ACCOUNT
Quantity Sold	Shows how many cards per each card program were sold during an evaluated month	ICARE_ACCOUNT
Amount Sold	Shows total amount sold as well as total amount sold per month	ICARE_ACCOUNT

Field	Description	Table
Acct with Balances	Shows accounts that have current and existing balances on them	ICARE_ACCOUNT
% of Balances	Displays how much the percentage of the balance is with respect to all cards in that month	ICARE_ACCOUNT
Outstanding Balances	Displays how many cards have a balance	ICARE_ACCOUNT
% of Outstanding Balances	Displays the percentage of the balance is with respect to all cards in that month	ICARE_ACCOUNT
Number Expired	Shows number of all expired cards	ICARE_ACCOUNT
Expired Balance	Shows the amount left on cards at the time of expiration	ICARE_ACCOUNT

Account Liability Report

The Account Liability Report displays the amount that is currently on gift cards, loyalty cards, etc. It is the amount that the organization is “liable” for. For instance, if there are 100 cards with \$100 each, then the organization is responsible for \$10,000. When customers come into the store with the intent to redeem the balances on their cards, the organization must guarantee that the balances will be covered.

Template

- ◆ iCareAccountLiability.xml

Example

Account Liability Report		
Location Program	Number of Cards	Balance
MICROS Cafe	37,421	254,017.85
Active Accounts	17,175	127,485.22
Laurel	1,171	6,869.32
Gift Cards	1,109	5,747.02
Springfield	1,191	7,421.17
Gift Cards	1,112	5,618.62
Closed Accounts	20,246	126,532.63
Chesapeake	1,231	8,226.22
Laurel	1,801	10,080.10
Gift Cards	1,788	7,680.10
Springfield	1,943	10,862.36
Gift Cards	20	500.00

Field	Description	Table
Location	Displays the location name	
Program	Displays the name of the iCare Program	
Number of Cards	Displays the total number of cars per location and per program	
Balance	Displays the available balance per location and per program	

Accounts Summary Report

The Accounts Summary Report shows a listing of accounts by program. Listing of activity of all iCare programs: inactive reversed, newly active, other, and active. Drill down capabilities of each iCare program where Account numbers are available along with the issuance type (points or \$), Currency, Initial Credit, Credits, Debits, Balance, Reversed, Valid until, and if the account is expired.

Template

- ◆ iCareAccounts.xml

Example

Accounts Summary					
Program Name	Code	Type	Status	Count	Balance
Dollars to Spend	\$ to Spend	Award		0	0.00
				0	0.00
Gift Card	GC_2675	Gift Card		35	185.42
			Inactive Reversed	1	0.00
			Active	19	71.40
			Newly Active	15	114.02
Points Earned	LC_2680	Loyalty		0	0.00
				0	0.00

Field	Description	Table
Program Name	Displays the name of the GPL Program Drills down to the iCare Account Listing Report.	ICARE_PROGRAM
Code	Displays the card program code	ICARE_PROGRAM
Type	Specifies the card type (gift, loyalty, award)	ICARE_PROGRAM
Status	Displays the status of the cards – inactive reversed, newly active, other, expired, or active	ICARE_ACCOUNT
Count	Shows the number of accounts	ICARE_ACCOUNT
Balance	Shows the overall and individual card program balances	ICARE_ACCOUNT

iCare Program Account Listing Report This report shows basic information about each of the accounts selected from the iCare Accounts Summary report. This report is a drill-down from the iCare Accounts Summary report.

Template

- ◆ iCareAccountListing.xml

Example

iCare Program Account Listing									
Accounts From:		#026750000000010	To:		#026750000040007	Next 2000			
Account	Type	Currency	Initial Credit	Credits	Debits	Balance	Reserved	Valid Until	Expired
#026750000000010	Currency	USD	1.00	1.00	0.00	1.00	0.00		
#026750000000054	Currency	USD	0.01	0.01	0.00	0.01	0.00		
#0267500000004456	Currency	USD	1.00	2.00	2.00	0.00	0.00		
#0267500000005004	Currency	USD	1.00	1.00	0.00	1.00	0.00		
#0267500000010318	Currency	USD	1.00	1.00	0.00	1.00	0.00		
#0267500000010761	Currency	USD	30.00	30.00	0.00	30.00	0.00		
#0267500000010874	Currency	USD	1.00	2.00	2.00	0.00	0.00		
#0267500000018474	Currency	USD	20.00	20.00	15.88	4.12	0.00		
#0267500000019986	Currency	USD	10.00	10.00	0.00	10.00	0.00		
#0267500000019997	Currency	USD	10.00	10.00	0.00	10.00	0.00		
#0267500000020003	Currency	USD	1.00	2.00	2.00	0.00	0.00		
#0267500000020014	Currency	USD	1.00	2.00	0.00	2.00	0.00		
#0267500000020025	Currency	USD	0.01	0.01	0.00	0.01	0.00		
#0267500000020912	Currency	USD	10.00	10.00	0.00	10.00	0.00		
#0267500000020923	Currency	USD	10.00	10.00	0.00	10.00	0.00		
#0267500000024983	Currency	USD	1.00	1.00	1.00	0.00	0.00		
#0267500000025008	Currency	USD	1.00	2.25	2.00	0.25	0.00		

Field	Description	Table
Account	Specifies the account number Drills down to the Account Activity Report	ICARE_ACCOUNT
Type	Shows what type of value the card program accumulates (currency or points)	ICARE_ACCOUNT
Currency	Specifies the ISO Currency code	ICARE_ACCOUNT
Initial Credit	Displays the first or initial credit on the account	ICARE_ACCOUNT
Credits	Displays all credits/additions to the account	ICARE_ACCOUNT
Debits	Displays any debits to the account	ICARE_ACCOUNT
Balance	Shows the total current balance	ICARE_ACCOUNT
Reserved	Shows how much, if any, amount is to be kept in reserve	ICARE_ACCOUNT
Valid Until	Displays a valid until date	ICARE_ACCOUNT
Expired	Shows whether or not the account is expired	ICARE_ACCOUNT

Account Activity Report This report shows all activity on a selected account. This report is a drill-down from the Program Account Listing report.

Template



Example

Account Activity Report

ACCOUNT	TYPE	PROGRAM	Card	Previous	Current					
Date	Time	Location	Description	Check	Present	Rollback	Balance	Points	Amount	Balance
#0267500000018474	Currency	Gift Card								
11/3/2007	3:05 PM	Belmont	Issue	233	Y		0.00	0	20.00	20.00
11/3/2007	5:42 PM	Allen	Chk: 999	999	Y		20.00	0	(3.43)	16.57
11/4/2007	6:48 PM	Allen	Chk: 516	516	Y		16.57	0	(3.70)	12.87
11/5/2007	4:44 PM	Allen	Chk: 270	270	Y		12.87	0	(3.39)	9.48
11/6/2007	6:29 PM	Allen	Chk: 542	542	Y		9.48	0	(5.36)	4.12

Field	Description	Table
Account	Displays the account number	ICARE_ACCOUNT
Type	Shows what type of value the card accumulates (currency or points)	ICARE_ACCOUNT
Program	Shows the program name	ICARE_PROGRAM
Date	Shows the date of the transaction	ICARE_ACCOUNT_T RANSACTION
Time	Shows the time of the transaction	ICARE_ACCOUNT_T RANSACTION
Location	Shows the location where the transaction occurred	ICARE_ACCOUNT_T RANSACTION
Description	Description of what type of transaction occurred	ICARE_ACCOUNT_T RANSACTION
Check	Shows the check number for the transaction Drills down to check detail (mymicros & iCare)	ICARE_ACCOUNT_T RANSACTION
Card Present	Shows if the card was present for the transaction (Y or N)	ICARE_ACCOUNT_T RANSACTION
Rollback	Shows if there was any rollback	ICARE_ACCOUNT_T RANSACTION
Previous Balance	Displays any previous balance on the card	ICARE_ACCOUNT_T RANSACTION
Points	Shows if any points exist	ICARE_ACCOUNT_T RANSACTION

Field	Description	Table
Amount	Shows the amount deducted from the card	ICARE_ACCOUNT_TRANSACTION
Current Balance	Shows the card's new balance	ICARE_ACCOUNT_TRANSACTION

Award Audit Summary

This report shows high levels of point issues and awards by employee. All Awards given can be viewed by employee number. This report shows the quantity of issues or points issued and the quantity of awards or points awarded. Drill down capability of each Loyalty iCare program, which allows you to monitor the frequency of awards based on account number and employee number.

Template

- ◆ iCareAwardsAuditSummary.xml

Example

Program Awards Audit Summary

Location	Program	Employee Num	Issues Qty	Points	Awards Qty	Points	Net Points
Philadelphia							
<u>Loyalty Club</u>							
		110	6	1,050.00	2	0.00	1,050.00
Coral Gables							
<u>Loyalty Club</u>							
		592	3	973.00	1	0.00	973.00
		530	2	184.00	1	0.00	184.00
Chicago							
<u>Loyalty Club</u>							
		550	3	225.00	1	0.00	225.00
		520	2	911.00	2	0.00	911.00
		610	2	230.00	1	0.00	230.00
Las Vegas							
<u>Loyalty Club</u>							
		140	5	368.00	1	0.00	368.00
		579	3	492.00	1	0.00	492.00

Field	Description	Table
Location	Shows the name of the location	ICARE_LOCATION
Program	Displays the name of the card program Drills down to Employee Audit by Location	ICARE_PROGRAM
Employee Number	Shows the employee number who performed the transaction	ICARE_ACCOUNT

Field	Description	Table
Issue Qty	Show how many accounts were issued	ICARE_ACCOUNT_TRANSACTION
Issue Points	Shows how many points were issued to the issued accounts	ICARE_ACCOUNT_TRANSACTION
Awards Qty	Shows how many awards became eligible	ICARE_ACCOUNT_TRANSACTION
Award Points	Shows how many award points will be necessary to redeem all the awards	ICARE_ACCOUNT_TRANSACTION
Net Points	Shows how many outstanding or unredeemable points exist outside of the points necessary to redeem an award	ICARE_ACCOUNT_TRANSACTION

Employee Audit by Location This report shows the exact same information as the Award Audit Summary report, however it shows only points earning and award redeeming information for a selected loyalty program. It is further sorted by employee number, thus showing which employees either issued points or redeemed awards. Users can drill-down further on the actual account number to see the Program Account Audit Report, which details the account history for the selected account number.

Template

- ◆ iCareAwardsAudit.xml

Example

Employee Audit by Location

Employee Num Account Num	Issues Qty	Points	Awards Qty	Points	Net Points
Loyalty Club at Coral Gables					
501					
<u>6012530079821196171</u>	2	1,109.00	1	0.00	1,109.00
530					
<u>6012530079821196216</u>	2	3,327.00	1	0.00	3,327.00
<u>6012530079821196238</u>	2	184.00	1	0.00	184.00
613					
<u>6012530079821196166</u>	3	25.00	1	0.00	25.00
<u>6012530079821196203</u>	2	0.00	2	0.00	0.00
645					
<u>6012530079821178396</u>	2	245.00	1	0.00	245.00
649					
<u>6012530079821196173</u>	2	25.00	2	0.00	25.00
905					
<u>6012530079821195517</u>	2	0.00	2	0.00	0.00

Field	Description	Table
Employee Num	Displays the employee ID number responsible for the transaction	ICARE_ACCOUNT_TRANSACTION
Account Num	Displays the account number subject to the transaction Drills down to the Program Account Audit Report	ICARE_ACCOUNT
Issues Qty	Shows how many issues have been placed against the card	ICARE_ACCOUNT_TRANSACTION
Issues Points	Shows the total number of points issued to the account	ICARE_ACCOUNT_TRANSACTION
Awards Qty	Shows how many awards the account holder has redeemed his/her points for	ICARE_ACCOUNT_TRANSACTION
Awards Points	Shows how many award points have been redeemed	ICARE_ACCOUNT_TRANSACTION
Net Points	Displays the number of outstanding, un-redeemed points for that account	ICARE_ACCOUNT_TRANSACTION

Program Account Audit Report The Program Account Audit Report shows all historical account information, as far back as the initial issuance of that account. This report is a third-level report and is a drill-down report of the Employee Audit by Location report.

Template

- ◆ iCareAcctAudit.xml

Example

Program Account Audit

ACCOUNT	TYPE	PROGRAM		Card	Employee	Previous		Current		
Date	Time	Location	Description	Check	Present	Balance	Points	Amount	Balance	
60125300798211962	Points	Club								
10/10/2007	9:03 PM	Coral Gables	Private Dining Chk: 3602	3602		530	0.00	25	25.00	25.00
10/10/2007	9:03 PM	Coral Gables	New Customer	3602		530	25.00	0	0.00	25.00
10/10/2007	9:05 PM	Coral Gables	Private Dining Chk: 3593	3593		530	25.00	3,302	4,226.88	3,327.00

Field	Description	Table
Account	Displays the account number	ICARE_ACCOUNT
Type	Shows what type of value the card accumulates (currency or points)	ICARE_ACCOUNT
Program	Shows the program name	ICARE_PROGRAM
Date	Shows the date of the transaction	ICARE_ACCOUNT_TRANSACTION
Time	Shows the time of the transaction	ICARE_ACCOUNT_TRANSACTION
Location	Shows the location where the transaction occurred	ICARE_ACCOUNT_TRANSACTION
Description	Description of what type of transaction occurred	ICARE_ACCOUNT_TRANSACTION
Check	Shows the check number for the transaction Drills down the check detail (mymicros & iCare)	ICARE_ACCOUNT_TRANSACTION
Card Present	Shows if the card was present for the transaction (Y or N)	ICARE_ACCOUNT_TRANSACTION
Employee Number	Shows the employee number who performed the transaction	ICARE_ACCOUNT
Previous Balance	Displays any previous balance on the card	ICARE_ACCOUNT_TRANSACTION
Points	Shows if any points exist	ICARE_ACCOUNT_TRANSACTION
Amount	Shows the amount of the check value	ICARE_ACCOUNT_TRANSACTION
Current Balance	Shows the card's new balance	ICARE_ACCOUNT_TRANSACTION

Coupon Redemption

Template



Example

Coupon Redemption By Location Report		
<u>Location</u>	<u>Qty</u>	<u>Amount</u>
Anniversary Dinner	3	65.00
Reston	1	20.00
Rockville	1	30.00
Tysons Corner	1	15.00

Field	Description	Table
Location		
Qty		
Amount		

Coupon Status

Template



Example

Field	Description	Table

Field	Description	Table

iCare Exceptions Log

Shows exceptions logged during iCare posting. These are all exceptions, whether they occur at the iCare DB or at the POS. This report shows the Location, Business Date, Transaction date and time, the Exception Type, Description of the exception, the Account Number, the Transaction Key (for iCare database tracking purposes), the Amount of the exception, and the Account Type (currency, points, or award).

Template

- ◆ iCareExceptions.xml

Example

iCare Exception Log

Location	Business Date	Local Transaction Date-Time	Exception Type	Description	Account	Transaction Key	Amount	Account Type
Web	11/7/2007	11/7/2007 9:29 PM	Expired	Rollback period has expired, cannot rollback previous transaction	6012530079881501541	29334420	25.00	Points
Web	11/7/2007	11/7/2007 12:23 PM	Expired	Rollback period has expired, cannot rollback previous transaction	6012530079881501540	29316104	25.00	Points
Web	11/6/2007	11/6/2007 5:30 PM	Expired	Rollback period has expired, cannot rollback previous transaction	6012530079881501539	29311238	25.00	Points
Web	11/6/2007	11/6/2007 2:12 PM	Expired	Rollback period has expired, cannot rollback previous transaction	6012530079881501538	29309159	25.00	Points
Web	11/6/2007	11/6/2007 1:22 PM	Expired	Rollback period has expired, cannot rollback previous transaction	6012530079881501537	29306840	25.00	Points
Web	11/6/2007	11/6/2007 12:19 PM	Expired	Rollback period has expired, cannot rollback previous transaction	6012530079881501536	29295244	25.00	Points

Field	Description	Table
Location	Shows the location	ICARE_LOCATION
Business Date	Shows the business date when the transaction occurred	ICARE_EXCEPTION_LOG
Location Transaction Date-Time	Displays the date and time at the location where the transaction occurred	ICARE_EXCEPTION_LOG

Field	Description	Table
Exception Type	Displays the type of exception/error (rollback, expired, invalid, activity)	ICARE_EXCEPTION_LOG
Description	Provides a brief description of the exception	ICARE_EXCEPTION_LOG
Account	Shows the account number for the transaction	ICARE_ACCOUNT
Transaction Key		ICARE_EXCEPTION_LOG
Amount	Shows the transaction amount	ICARE_EXCEPTION_LOG
Account Type	Shows what type of value the card accumulates (currency or points)	ICARE_EXCEPTION_LOG

Loc Reconciliation

Shows gift card issues and redemptions by location. Shows only gift cards that were purchased in one location, but used in a different location. Items listed in the report are: Issuing Location and Program, Activity Location (where the card was used), the Transaction Activity of the account (Redemptions, Cash outs, or Reloads), and the Net Total. The report is broken down into 3 sections:

1. Issuing Location versus the Activity location (where the card was redeemed or reloaded)
2. Redemption Location versus Activity Location (where the card was issued)
3. Net Totals of all transactions that occurred between different locations and the credits due

The following example shows two locations issuing and redemption information as well as the amounts of the transactions. This account can be further filtered by card program, in more than common event an organization has more than one Gift, Payment, or Loyalty Program.

Template

- ◆ iCareLocReconciliation.xml

Example

Location Reconciliation Report

Issuing Location		Transaction Activity			Net
Program	Activity Location	Redemptions	Cashouts	Reloads	Total
Belmont		4	0	0	(15.88)
Gift Card	Allen	4	0	0	(15.88)
Sweet Home		3	0	3	(17.01)
Gift Card	Belmont	1	0	0	(10.00)
Gift Card	Transit	1	0	2	(2.01)
Gift Card	Delaware	1	0	1	(5.00)
Redemption Location		Issue			Net
Program	Activity Location	Transactions			Total
Belmont		1			10.00
Gift Card	Sweet Home	1			10.00
Transit		1			2.01
Gift Card	Sweet Home	1			2.01
Allen		4			15.88
Gift Card	Belmont	4			15.88
Location	Transactions	Debits Due	Credits Due		
Total	20	22.89	22.89		
Belmont	5	5.88			
Sweet Home	6	17.01			
Delaware	2		5.00		
Transit	3		2.01		
Program ** Select a program below to view report filtered by program **					
<u>Gift Card</u>					

Field	Description	Table
Issuing Location		
Issuing Location	Shows the location where the account was initially issued	ICARE_LOCATION
Program	Displays the name of the card program	ICARE_PROGRAM
Activity Location	Shows which location the card was used	ICARE_ACCOUNT
Redemptions	Shows how many redemptions occurred at this location	ICARE_ACCOUNT_TRANSACTION
Cashouts	Shows how many “cashouts” occurred at this location	ICARE_ACCOUNT_TRANSACTION
Reloads	Shows how many times this card has been reloaded with more funds	ICARE_ACCOUNT_TRANSACTION
Net Totals	Shows the net total in sales that were generated by the various card transactions	ICARE_ACCOUNT_TRANSACTION
Redemption Locations		
Redemption Locations	Shows all locations where redemptions occurred	ICARE_LOCATION

Field	Description	Table
Program	Displays the name of the card program	ICARE_PROGRAM
Issue Transactions	Shows how many card transactions were of the issue status at that location	ICARE_ACCOUNT_TRANSACTION
Net Totals	Shows the net total in sales that were generated by the various card transactions	ICARE_ACCOUNT_TRANSACTION
Locations		
Locations	Shows the location name	ICARE_LOCATION
Transactions	Shows how many transaction occurred at that location	ICARE_ACCOUNT_TRANSACTION
Debits Due	Shows how much is due to customers	ICARE_ACCOUNT_TRANSACTION
Credits Due	Shows the balance on outstanding cards	ICARE_ACCOUNT_TRANSACTION
Program	Select the Program Name listed to see Location Reconciliation information for that program only.	

Outstanding Balance

The purpose of the Outstanding Balance Report is to show how much value, either points or money, is outstanding on existing accounts at any one time. The report is organized by card programs as well as by month. The report shows point or dollar balance as of last transaction and real time snapshots of points or dollar balances of all active loyalty or debit accounts. The report includes: the year and month of accounts Last Visit, the # of Cards, % of Cardholders, Point (or dollar) Balance, % of Total Outstanding Points.

This report will show outstanding balances for all card programs. This is why, like in the example shown, there are two separate card program shown, but the information gathered from the various database tables is the same.

Template

- ◆ iCareOutstandingBalance.xml

Example

Outstanding Dollar Balance Based on Cardholder's Date of Last Transaction
Debit, Award and Credit Programs

Last Visit	# of Cards	% of Cardholders	Balance	% of Total Outstanding Dollar
Gift Card Total:	23,160	99.84%	1,320,934.48	99.96%
2007	16,583	71.49%	727,821.70	55.08%
January	2,092	3.85%	50,940.04	3.85%
February	1,709	2.96%	39,131.30	2.96%
March	1,664	3.92%	51,808.77	3.92%
April	1,342	4.19%	55,372.26	4.19%
May	1,441	4.31%	56,895.46	4.31%
June	1,788	5.93%	78,341.63	5.93%
July	1,444	4.20%	55,522.91	4.20%
August	1,470	5.48%	72,407.36	5.48%
September	1,453	6.82%	90,061.84	6.82%
October	1,569	7.07%	93,366.62	7.07%
November	611	6.35%	83,973.51	6.35%

Outstanding Point Balance Based on Cardholder's Date of Last Transaction
Loyalty Programs

Last Visit	# of Cards	% of Cardholders	Balance	% of Total Outstanding Points
Loyalty Club Total:	503,588	99.99%	231,461,367	100.00%
2007	84,162	16.71%	175,155,879	75.67%
January	4,780	2.17%	5,025,247	2.17%
February	4,763	2.40%	5,544,388	2.40%
March	5,647	3.00%	6,944,109	3.00%
April	5,219	2.94%	6,799,026	2.94%
May	5,798	3.55%	8,206,264	3.55%
June	7,450	4.83%	11,177,311	4.83%
July	8,534	6.15%	14,245,781	6.15%
August	9,189	7.42%	17,172,403	7.42%
September	10,372	10.12%	23,412,374	10.12%
October	16,620	22.03%	50,985,856	22.03%
November	5,787	11.08%	25,637,242	11.08%

Field	Description	Table
Last Visit	Shows how many card transactions occurred in the specified period of time	ICARE_ACCOUNT
# of Cards	Shows how many cards had transactions applied against them within the specified period of time	ICARE_ACCOUNT
% of Cardholders	Shows the percent of card holders that used their cards in the specified period of time	ICARE_ACCOUNT
Balance	Shows the all existing outstanding balances (this field may be either points or dollar/monetary values – depends on program)	ICARE_ACCOUNT

Field	Description	Table
% of Total Outstanding Balance	Shows the ratio of outstanding balances with regard to all outstanding balances	ICARE_ACCOUNT
Program Name	Displays the program name	ICARE_PROGRAM
Year(s)	Shows the year of the transactions	ICARE_ACCOUNT
Month(s)	Shows the month of the transactions	ICARE_ACCOUNT

iCare Program Activity

The Program Activity Report shows awards, gift card & loyalty program activity. All activity of each program during a particular date range. Drill down capability of each program where the following is available: quantity and total of Issues, Bonus, Redemptions, Reloads, Cash outs, and a Net of the program activity. Also valuable are the Issues and Reloads of Reset Transactions, which are transactions that appear on the Exceptions Report, but the transaction still occurred.

Template

- ◆ iCareProgram.xml

Example

Program Name	Type	Currency	Net Amount	Bonus Amount	Points	Bonus Points	Transactions
All Programs:			15,257,947.99	5,095.00	251,070	1,744	788,576
Corporate	Gift Card	USD	(1,144.96)				555 New Accts
Donations	Gift Card	USD	5,029.30				685 New Accts
Gift_Cards	Gift Card	USD	(63,224.77)	4,995.00			12,292 New Accts
Manager	Gift Card	USD	(65,395.75)				3,563 New Accts
Platinum Club	Gift Card	USD	(374.65)	100.00			66 New Accts
Dedicated Diners	Loyalty	USD	14,860,582.31		247,804	1,744	720,058 New Accts
DD To Go Program	Loyalty	USD	197,540.08		3,231		10,493 New Accts
Corporate On Duty	Loyalty	USD	37,318.78		8		5,047 New Accts

Field	Description	Table
Program Name	Displays the name of the card program Drills down to the Program Activity Summary by Location Report	ICARE_PROGRAM
Program Type	Shows what type of card program it is (gift, loyalty, award)	ICARE_PROGRAM
Currency	Specifies the ISO Currency code	ICARE_PROGRAM
Net Amount	Shows the amount outstanding for card programs	ICARE_ACCOUNT_TRANSACTION
Bonus Amount		ICARE_ACCOUNT_TRANSACTION

Field	Description	Table
Points	Shows how many points were issued	ICARE_ACCOUNT_TRANSACTION
Bonus Points	Displays how many bonus points were issued	ICARE_ACCOUNT_TRANSACTION
Transactions	Shows how many card program transactions occurred	ICARE_ACCOUNT_TRANSACTION
New Accounts	This link will direct the user to the iCare New Account Activity Report which displays all new account information.	

Program Activity Summary by Location The Program Activity Summary by Location Report shows exactly that: all program activity broken up and organized by specific locations. Depending on how many locations exist for an organization, this report can get rather long and detailed. For this purpose, a user has the ability to drill-down on the location name and see specific details on a store level.

Template

- ◆ iCareProgramByLoc.xml

Example

Program Activity Summary by Location

Program Transactions															Reset Trans			
Location	Issues		Bonuses		Redeems		Reloads		Cashout		Rev/Ad		Net		Iss/Rel		Card Not Present	
	Qty	Total	Qty	Total	Qty	Total	Qty	Total	Qty	Total	Qty	Total	Qty	Total	Qty	Total		
Gift Cards:	47	1,220.00	0	0.00	78	(1,322.83)	0	0.00	0	0.00	0	0.00	0	0.00	(102.83)	0	0.00	32
<u>Cheasapeake</u>	15	335.00	0	0.00	7	(81.25)	0	0.00	0	0.00	0	0.00	0	0.00	253.75	0	0.00	2
<u>Cherry Hill</u>	0	0.00	0	0.00	2	(48.98)	0	0.00	0	0.00	0	0.00	0	0.00	(48.98)	0	0.00	1
<u>Greenbelt</u>	1	20.00	0	0.00	2	(19.34)	0	0.00	0	0.00	0	0.00	0	0.00	0.66	0	0.00	1
<u>Lake Forest</u>	0	0.00	0	0.00	1	(4.48)	0	0.00	0	0.00	0	0.00	0	0.00	(4.48)	0	0.00	0
<u>Laurel</u>	2	75.00	0	0.00	7	(121.04)	0	0.00	0	0.00	0	0.00	0	0.00	(46.04)	0	0.00	2
<u>Potomac Mills</u>	4	105.00	0	0.00	3	(29.99)	0	0.00	0	0.00	0	0.00	0	0.00	75.01	0	0.00	0
<u>Springfield</u>	1	25.00	0	0.00	7	(119.87)	0	0.00	0	0.00	0	0.00	0	0.00	(94.87)	0	0.00	4
<u>Virginia Beach</u>	4	110.00	0	0.00	3	(75.08)	0	0.00	0	0.00	0	0.00	0	0.00	34.92	0	0.00	2

Field	Description	Table
Program Name	Displays the card program name Drills down to the Program Activity by Business Date Report	ICARE_PROGRAM
Location	Displays the name of the location	ICARE_PROGRAM
Issues Qty	Shows the number of issued accounts	ICARE_PROGRAM
Issues Total	Shows the monetary/point value of all issued accounts	ICARE_PROGRAM
Bonuses Qty	Shows the number of bonuses applied to accounts	ICARE_PROGRAM

Field	Description	Table
Bonuses Total	Shows the monetary/point value of all bonuses applied to accounts	ICARE_PROGRAM
Redeems Qty	Shows the number of redeems on accounts	ICARE_PROGRAM
Redeems Total	Shows the monetary/point value of all redeems on accounts	ICARE_PROGRAM
Reloads Qty	Shows the number of reloaded accounts	ICARE_PROGRAM
Reloads Total	Shows the monetary/point value of all reloaded accounts	ICARE_PROGRAM
Cashout Qty	Shows the number of accounts that were cashed out	ICARE_PROGRAM
Cashout Total	Shows the monetary/point value of all cashed out accounts	ICARE_PROGRAM
Rev/Adj Qty	Shows the number of accounts that had a reversal adjustment applied	ICARE_ACCOUNT_TRANSACTION
Rev/Adj Total	Displays the monetary/point value of reversed and adjusted accounts	ICARE_ACCOUNT_TRANSACTION
Net Total	Shows the total amount of all totals added together	ICARE_ACCOUNT_TRANSACTION
Iss/Rel Qty	Shows the number of accounts that had a issue and reload applied	ICARE_ACCOUNT_TRANSACTION
Iss/Rel Total	Displays the monetary/point value of reloaded reissued accounts	ICARE_ACCOUNT_TRANSACTION
Card Not Present	Shows whether or not the card was present at the time of the transaction (Y/N)	ICARE_ACCOUNT_TRANSACTION
Reset Trans	Use this link to reset all transaction to zero	

Program Activity by Business Date The purpose of the Program Activity by Business Date Report is to show all program activity on a given business date for a selected location. This is a drill-down report from the Program Activity Summary by Location Report. You will be able to view individual dates at a time if desired.

Template

- ◆ iCareProgramByDate.xml

Example

Program Activity by Business Date

Program Transactions													Reset Trans		
Business Date	Issues		Bonuses		Redeems		Reloads		Cashout		Rev / Adj	Net	Reset Qty	Reset Total	Card Present
Date	Qty	Total	Qty	Total	Qty	Total	Qty	Total	Qty	Total	Qty	Total	Qty	Total	Present
Gift Cards:															
Merrifield	7	215.00	0	0.00	6	(153.07)	0	0.00	0	0.00	0	0.00	0	0.00	4
11/7/2007	0	0.00	0	0.00	1	(49.46)	0	0.00	0	0.00	0	0.00	0	0.00	0
11/6/2007	0	0.00	0	0.00	1	(44.32)	0	0.00	0	0.00	0	0.00	0	0.00	1
11/5/2007	1	50.00	0	0.00	1	(10.00)	0	0.00	0	0.00	0	0.00	0	0.00	0
11/4/2007	0	0.00	0	0.00	2	(39.29)	0	0.00	0	0.00	0	0.00	0	0.00	2
11/3/2007	3	95.00	0	0.00	1	(10.00)	0	0.00	0	0.00	0	0.00	0	0.00	1
11/2/2007	3	70.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0

Field	Description	Table
Program Name	Displays the card program name	ICARE_PROGRAM
Location Name	Displays the name of the location	ICARE_LOCATION
Business Date	Display the date of the card transaction Drills down to the Program Activity Detail Report	ICARE_ACCOUNT_TRANSACTION

Program Activity Detail Report The Program Activity Detail Report shows all program activity for a specified day at a selected location. This report is a drill-down report from the Program Activity by Business Date Report.

Template

- ◆ iCareProgramDetail.xml

Example

Program Activity Detail

Business Date	Time	Account	Check	Category	Reset	Card Not Present	Reversal	POS Terminal	Emp Num	Points	Amount	New Balance
Gift Cards:												
Merrifield												
11/3/2007	9:55 AM	#0010000000591798	4440	ISSUE				1	801	0	45.00	45.00
11/3/2007	10:02 AM	#0010000000591801	4441	ISSUE				1	801	0	30.00	30.00
11/3/2007	12:20 PM	#0010000000591787	4450	ISSUE				1	801	0	20.00	20.00
11/3/2007	2:53 PM	#0010000000591196	5554	REDEEM		Y		6	140	0	(10.00)	0.00

Field	Description	Table
Business Date	Displays the business date of the card transaction	ICARE_ACCOUNT_TRANSACTION
Time	Shows the time of the card transaction	ICARE_ACCOUNT_TRANSACTION

Field	Description	Table
Account	Shows the account number of the card transactions	ICARE_ACCOUNT
Check	Shows the check number for the card transaction Drills down to check details (mymicros & iCare)	ICARE_ACCOUNT_TRANSACTION
Category	Specifies what type of transactions occurred (issue, activate, reload, etc.)	ICARE_ACCOUNT_TRANSACTION
Reset	Displays whether this account has every been reset	ICARE_ACCOUNT_TRANSACTION
Card Not Present	Shows whether or not the card was present at the time of the transaction (Y/N)	ICARE_ACCOUNT_TRANSACTION
Reversal	Specifies if there was a reversal on the account	ICARE_ACCOUNT_TRANSACTION
POS Terminal	Displays at exactly what POS terminal in the location where the transaction occurred	ICARE_ACCOUNT_TRANSACTION
Emp Num	Displays the employee number who authorized the transaction	ICARE_ACCOUNT_TRANSACTION
Points	Shows how many points were applied to the account	ICARE_ACCOUNT_TRANSACTION
Amount	Display the amount of the credit/debit	ICARE_ACCOUNT_TRANSACTION
New Balance	Shows the new balance on the account after the transaction is complete	ICARE_ACCOUNT_TRANSACTION

New Account Activity Report The New Account Activity Report displays all new account information for a selected date range. This report can be used to monitor how many locations are enrolling new loyalty members and gift card users.

Template

- ◆ iCareNewAccts.xml

Example

iCare New Account Activity

Business	Date	Time	Account	Check	Category	Card Not Reset	Present	Revers.	Terminal	POS	Emp Num	Points	Amount	New Balance
Gift Card:														
Allen														
	6/16/2008	3:33 PM	0267500000003319	967	ISSUE					2	268	0	20.00	20.00
Main Street														
	6/19/2008	4:19 PM	0267500000045784	18	REDEEM					1	3003	0	(10.00)	0.00
Sweet Home														
	6/18/2008	4:59 PM	0267500000045784	707	ISSUE					2	3297	0	10.00	10.00
	6/19/2008	4:35 PM	0267500000046092	891	ISSUE					2	3297	0	10.00	10.00
	6/19/2008	8:05 PM	0267500000046092	938	REDEEM					2	3289	0	(10.00)	0.00
Transit														
	6/16/2008	9:13 PM	0267500000044818	185	ISSUE					1	286	0	20.00	20.00

This Report displays information similar to the previously detailed Activity Reports

Rollbacks Summary

This report shows amounts and numbers of check and transactions where of iCare rollbacks occurred. The report shows all Rollbacks that occurred either at the iCare hosting center or at the POS. Drill down capability of each report where the following is available: Date, Time, Account, Check, Category (type of transaction), if the card was not present, the POS Terminal this occurred at, the number of Points or Amount, and the New Balance.

Template

- ◆ iCareRollbacks.xml

Example

iCare Rollbacks Summary

Program Location	Rollback Amount	Rollback Points	Checks	Transactions
Dedicated Diners	906.19	16	30	34
Cherry Hill	122.35	3	3	3
Laurel	90.99	5	4	5
Newport News	293.75	8	8	8
Reston	269.65		10	12
Springfield	129.45		5	6
Platinum Card	(1.04)	-1	1	1
Reston	(1.04)	-1	1	1
Manager Card	33.71		3	6
Reston	25.06		2	4
Springfield	8.65		1	2

Field	Description	Table
Program Name	Displays the card program name	ICARE_PROGRAM
Location	Displays the name of the location Drills down to the iCare Rollbacks Detail Report	ICARE_LOCATION

Field	Description	Table
Rollback Amount	Shows the monetary amount of the rollback (if applicable)	ICARE_ACCOUNT_TRANSACTION
Rollback Points	Shows the amount of point for the rollback (if applicable)	ICARE_ACCOUNT_TRANSACTION
Checks	Shows the number of checks that contained a rollback	ICARE_ACCOUNT_TRANSACTION
Transactions	Shows the number of transactions consisting of a rollback	ICARE_ACCOUNT_TRANSACTION

iCare Rollback Detail Report The iCare Rollback Detail Summary Report shows detailed rollback information on a location-date basis. This is a second-level drill-down report from the iCare Rollback Summary Report.

Template

- ◆ iCareRollbackDetail.xml

Example

iCare Rollback Detail

Business				Card Not		POS	Emp			New		
Date	Time	Account	Check	Category	Reset/Presen	Revers.	Terminal	Num	Points	Amount	Balance	
Dedicated Diners:												
Newport												
10/2/2007	6:28 PM	0010200004539192	6390	ISSUESVPTS				3	108	1	23.35	2.00
10/4/2007	6:01 PM	0010200005730937	6741	ISSUESVPTS				6	187	1	49.07	2.00
10/10/2007	6:50 AM	0010200004949790	8278	ISSUESVPTS				2	183	1	34.96	1.00
10/12/2007	1:56 PM	0010200004539603	8802	ISSUESVPTS				3	175	1	11.35	1.00
10/13/2007	9:33 PM	0010200005376755	9369	ISSUESVPTS				6	116	1	20.46	1.00
10/14/2007	8:56 PM	0010200005377563	9769	ISSUESVPTS				4	108	1	16.53	1.00
10/20/2007	4:47 PM	0010200004352006	1226	ISSUESVPTS				2	187	1	98.75	1.00
11/3/2007	7:16 PM	0010200004539078	5315	ISSUESVPTS				3	121	1	39.28	1.00

Field	Description	Table
Business Date	Displays the business date of the card transaction	ICARE_ACCOUNT_TRANSACTION
Time	Shows the time of the card transaction	ICARE_ACCOUNT_TRANSACTION
Account	Shows the account number of the card transactions	ICARE_ACCOUNT_TRANSACTION
Check	Shows the check number for the card transaction Drills down to check details (mymicros & iCare)	ICARE_ACCOUNT_TRANSACTION
Currency	Specifies what type of transactions occurred (issue, activate, reload, etc.)	ICARE_ACCOUNT_TRANSACTION

Field	Description	Table
Reset	Displays whether this account has every been reset	ICARE_ACCOUNT_TRANSACTION
Card Not Present	Shows whether or not the card was present at the time of the transaction (Y/N)	ICARE_ACCOUNT_TRANSACTION
Reversal	Specifies if there was a reversal on the account	ICARE_ACCOUNT_TRANSACTION
POS Terminal	Displays at exactly what POS terminal in the location where the transaction occurred	ICARE_ACCOUNT_TRANSACTION
Emp Num	Displays the employee number who authorized the transaction	ICARE_ACCOUNT_TRANSACTION
Points	Shows how many points were applied to the account	ICARE_ACCOUNT_TRANSACTION
Amount	Display the amount of the credit/debit	ICARE_ACCOUNT_TRANSACTION
New Balance	Shows the new balance on the account after the transaction is complete	ICARE_ACCOUNT_TRANSACTION

iCare Customer Reports

iCare Customer Reports

The following reports are top level reports under the iCare Customer Reports Category. They may or may not have drill-down reports:

- ◆ Customer Listing Report
- ◆ Customer Program Summary
- ◆ Customer Recency, Frequency, and Monetary Value Rankings
- ◆ Customer Visits
- ◆ GPL Active Report
- ◆ Guest Charges
- ◆ iCare Home Store Report
- ◆ Loyalty Performance
- ◆ New Customers
- ◆ iCare DB & Campaigning Reports
- ◆ Top 100 Customers

iCare Customer Reports are only available to those customers that have both the myMicros Product and the iCare Product.

Customer Listing Report

The Customer Program Listing Report displays iCare Card Programs and the method by which they are listed. In the example below, there are two listing methods: By Customer Name and By Customer POS Ref. When a search is done, the first sort criteria will be the customer's name, and the second sort criteria is customer POS Reference.

Template

- ◆ CustomerListing.xml

Example

Customer Program Listing

Program	Listing Method:	
Platinum Club	By Customer Name	By Customer POS Ref
Dedicated Diners	By Customer Name	By Customer POS Ref
Coffee Card	By Customer Name	By Customer POS Ref
Managers Card	By Customer Name	By Customer POS Ref
Gift Card	By Customer Name	By Customer POS Ref

Field	Description	Table
Program	Displays the GPL Program Name	CUSTOMER
Listing Method	Select a method by which to list account holders Drills down to either the Customer List Report by Name Report or the Customer List Report by POS Reference Report	

Customer List Selection Report The Customer List Selection Report shows ranges of accounts that can be drill-down into for further evaluation. Customers Lists are organized either by name or by POS Reference. From this page, users have the ability to select “pre-bundled” packets to review account information. This interface has been designed to help minimize the task of searching through hundreds if not thousands of card accounts. It is much quicker and simpler to search 1-2000 accounts rather than 1-200,000 accounts.

A Note About Customer Names

Customer information can be entered through the Account Administration portion of the iCare Administration portlet by organization System Administrators or, more commonly, customers access the myiCard.net website and enter their personal information. Typically, the practice of entering customer data has fallen on the customers themselves, as many times it is unpractical for a System Administrator to perform this task.

If you elect to view and search the Customer List by customer, you must ensure that customer lists exist in the system. For example, many times for an ordinary gift card program, customers may not be inclined to enter their information in the myiCard.net website. Therefore, those cards will always display “New Customer” as the customer name.

Certain Loyalty programs may have incentives for entering customer information, like a free menu item. Other loyalty programs may enforce restrictions, such as account holders will be ineligible to receive any awards until their customer information has been updated.

Template

- ◆ CustomerListingByName.xml

Example

Customer List - Selection Menu			
Program	Records	Start of Range	End of Range
Gift Card	<u>2001 - 4000</u>	New Customer	New Customer
Gift Card	<u>1 - 2000</u>	New Customer	New Customer
Gift Card			
Gift Card			

Customer List - Selection Menu			
Program	Records	Start of Range	End of Range
Gift Card	<u>2001 - 4000</u>	0184500000036232	0184500000063848
Gift Card	<u>1 - 2000</u>	0184500000000014	0184500000036221
Gift Card	<u>4001 - 6000</u>	0184500000063859	0184500000085300
Gift Card	<u>6001 - 8000</u>	0184500000085311	0184500000106862

Field	Description	Table
Program	Displays the name of the card program being evaluated	CUSTOMER
Records	Shows the range of existing records or accounts Drills down to either the Customer List by Name Report or the Customer List by POS Reference Report	
Start of Range	Shows the first name/number in the range	CUSTOMER
End of Range	Shows the last name/number in the range	CUSTOMER

Customer List by Name/POS Reference Report The Customer List by Name and the Customer List by POS Reference Reports both show minimal customer details, including name, reference number/account number, first and last visits and the number of total visits.

Template

- ◆ CustomerListNameRange.xml
- ◆ CustomerListPOSRefRange.xml

Example

Customer List By Name						
Customer	RefNum	Program	#Visits	First	Latest	
A/KABA	4744-XXXX-XXXX-4511	CCARD	1	12/28/2004	12/28/2004	
A/A/B	4635-XXXX-XXXX-0515	CCARD	1	4/7/2005	4/7/2005	
A/ALAN	7069-XXXX-XXXX-6070	CCARD	6	7/6/2005	7/6/2005	
A/ALLAN/G						
A/ALLISON LEBOSS HOVE						
A/AM						
A/ANGELA/L						
A/ANN/MARIE						
A/ARNOLD PENA						

Customer List By POS Reference						
Customer	RefNum	Program	#Visits	First	Latest	
AARONS/JAN	3712-XXXX-XXXX-1007	CCARD	1	7/21/2005	7/21/2005	
ABBOTTS/BG	3712-XXXX-XXXX-1007	CCARD	2	12/14/2004	5/9/2005	
ABELHALEM/AMR A	3712-XXXX-XXXX-1003	CCARD	1	5/12/2005	5/12/2005	
ABEL/TIMOTHY W	3712-XXXX-XXXX-1006	CCARD	11	11/7/2004	7/4/2005	
ABLON/FRED	3712-XXXX-XXXX-1005	CCARD	1	5/6/2005	5/6/2005	
ACHKAR/ST	3712-XXXX-XXXX-1005	CCARD	1	1/11/2005	1/11/2005	
ADAME/RAMON	3712-XXXX-XXXX-1004	CCARD	1	4/7/2005	4/7/2005	
ADAMOPOULOS/AC	3712-XXXX-XXXX-1005	CCARD	2	5/18/2005	6/22/2005	
ADAMS/RM	3712-XXXX-XXXX-1004	CCARD	3	2/17/2005	6/16/2005	

Field	Description	Table
Customer	Displays the name or account number for that customer Drills down to the Customer Transaction Report	CUSTOMER_TRANS ACTION
RefNum	Displays the name of the account number with hash marks	CUSTOMER_TRANS ACTION
Program	Shows the name of the card program being evaluated	CUSTOMER_TRANS ACTION
# Visits	Shows the number of visits in which a the card program was used	CUSTOMER_TRANS ACTION
First	Displays the date of the first time the account was used	CUSTOMER_TRANS ACTION
Latest	Displays the last time the account was used	CUSTOMER_TRANS ACTION

Customer Transaction Report The Customer Transaction Report shows detailed information about both the customer as well as the type of transactions enacted on the card program. There report has two portions, one which provides detailed customer data (if the customer has updated their information in the myiCard.net website) and the other which provides check transaction data.

Template:

- ◆ CustomerTransactions.xml

Example

Customer Transaction Report

Customer	Ref Num	Program	Address				
A/ALAN	5262-xxxx-xxxx-6070	CCARD					
E-Mail	Phone Number	Active	UDF1			UDF2	
		Y					
Customer	Date	Check	Location	Revenue Center	Guests	Discount Total	Total
A/ALAN	7/6/2005 6:13 PM	<u>1025</u>	023-Henderson	RESTAURANT	0	0.00	31.79
A/ALAN	7/12/2005 6:28 PM	<u>2844</u>	023-Henderson	RESTAURANT	0	0.00	23.01
A/ALAN	7/14/2005 5:23 PM	<u>3413</u>	023-Henderson	RESTAURANT	0	0.00	34.84
A/ALAN	7/15/2005 5:59 PM	<u>3742</u>	023-Henderson	RESTAURANT	0	0.00	31.28
A/ALAN	7/17/2005 6:58 PM	<u>4374</u>	023-Henderson	RESTAURANT	0	0.00	24.03
A/ALAN	7/20/2005 6:18 PM	<u>5174</u>	023-Henderson	RESTAURANT	0	0.00	19.46

Field	Description	Table
Customer	Displays the name or account number for that customer	CUSTOMER_TRANS ACTION
RefNum	Displays the name of the account number with hash marks	CUSTOMER_TRANS ACTION
Program	Shows the name of the card program being evaluated	CUSTOMER_TRANS ACTION
Address	Displays the account holder's mailing address (if supplied)	CUSTOMER_TRANS ACTION
E-mail	Displays the account holder's email address (if supplied)	CUSTOMER_TRANS ACTION
Phone Number	Displays the account holder's phone number (if supplied)	CUSTOMER_TRANS ACTION
Active	Displays whether or not the account is considered	CUSTOMER_TRANS ACTION
UDF1	Generic field used for any additional information	CUSTOMER_TRANS ACTION
UDF2	Generic field used for any additional information	CUSTOMER_TRANS ACTION
Customer	Displays the customer's name	CUSTOMER_TRANS ACTION
Date	Displays the time and date stamp for any card transaction	CUSTOMER_TRANS ACTION
Check	Displays the check ID number for that card transaction Drills down to check details (mymicros & iCare)	CUSTOMER_TRANS ACTION

Field	Description	Table
Location	Shows the location at where the card transaction was processed	CUSTOMER_TRANS ACTION
Revenue Center	Shows the revenue center wherein the card transaction took place	CUSTOMER_TRANS ACTION
Guests	Show how many guest were accounted for on that check	CUSTOMER_TRANS ACTION
Discount Total	Displays any discount that applied toward the check	CUSTOMER_TRANS ACTION
Total	Shows the total of the check amount	CUSTOMER_TRANS ACTION

Customer Program Summary

The Customer Program Summary Report shows all iCare Card Program activity across the organization and also locations where any of the Card Programs were used. Information includes the number of customers using the Card Programs, the total spent both location and organization wide, and the average checks.

Template

- ◆ CustomerProgram.xml

Example

Customer Program Summary Report								
Totals:	# Customers	# Checks	%	Total Spend	% Avg Check	Repeat Visits		
All Checks		24,089		3,116,476.14	129.37			
PLATNM	255	285	1%	45,947.62	1%	161.22	By Location	By Day Part
GIFT	227	231	1%	18,463.27	1%	79.93	By Location	By Day Part
CLUB	1,113	1,266	5%	235,600.87	8%	186.10	By Location	By Day Part
Location	# Customers	# Checks	%	Total Spend	% Avg Check			
Atlanta		1,388		118,625.33	85.46			
GIFT	586	617	44%	108,153.24	91%	175.29		
Atlantic City		584		116,341.31	199.21			
CLUB	78	83	14%	13,473.71	12%	162.33		
GIFT	20	20	3%	4,103.28	4%	205.16		
Boston		876		117,197.70	133.79			
GIFT	528	549	63%	115,660.21	99%	210.67		
Chicago		1,184		91,716.08	77.46			
GIFT	564	601	51%	80,960.88	88%	134.71		

Field	Description	Table
Card Program	Displays the name of the card program Drills down to the Customer Program Comparison by Location Report	ICARE_PROGRA M
# Customer	Displays the total number of customers who used some card program	OPERATIONS_D AILY_TOTAL

Field	Description	Table
# Checks	Shows the total number of checks affected by a card program	OPERATIONS_DAILY_TOTAL
%	Shows the percentage with respect to all sales of checks using card programs	
Total Spend	Shows the total amount spent and the total amount affected by card program transactions	OPERATIONS_DAILY_TOTAL
%	Shows the ratio of checks affected by card transactions compared to total sales	
Avg Check	Shows the average check value of all checks having card transactions applied	
Repeat Visits	Shows how many times the account holder used a card program Drills down to the Customer Program by Location Report or the Customer Program by Day Part Report	OPERATIONS_DAILY_TOTAL
Location	Shows the name for the location	LOCATION_HIERARCHY_TABL
Location - # Customers	Displays the total number of customers who used some card program at a specified location	LOCATION_HIERARCHY_ITEM
Location - # Checks	Shows the total number of checks affected by a card program at a specified location	LOCATION_HIERARCHY_ITEM
Location %	Shows the percentage with respect to all sales of checks using card programs at a specified location	
Location Total Spend	Shows the total amount spent and the total amount affected by card program transactions at a specified location	LOCATION_HIERARCHY_ITEM
Location % Avg Check	Shows the ratio of checks affected by card transactions compared to total sales at a specified location	

Customer Program Comparison by Location The Customer Program Comparison by Location report is a drill-down report from the Customer Program Summary Report. This report is accessed by clicking the name of the card program in the left most column. This report displays information about a selected card program by location.

Template

- ◆ CustomerProgramComparison.xml

Example

Customer Program Comparison By Location

Location	# Visits	%	Total Spend	%	Avg Check	# New Customers
Gift Card	231	3%	18,463.27	2%	79.93	
Atlantic City	20	3%	4,103.28	4%	205.16	10
Charlotte	20	2%	611.04	1%	30.55	12
Coral Gables	20	4%	513.21	1%	25.66	10
Las Vegas	18	1%	446.45	0%	24.80	9
Houston	15	2%	(30.23)	-0%	(2.02)	5
Denver	13	2%	(112.95)	-0%	(8.69)	6
Miami	7	2%	1,317.55	2%	188.22	4

Field	Description	Table
Location	Displays the name of the location	LOCATION_HIERARCHY_ITEM
# Visits	Shows how many visits to each location consisted of a card transaction	CUSTOMER_TRANSACTION
%	Shows the percentage of visits with card transaction per location with respect to all locations	CUSTOMER_TRANSACTION
Total Spend	Shows the total amount spent per location that included a card transaction	CUSTOMER_TRANSACTION
%	Shows the percentage of amounts per location with respect to all locations	CUSTOMER_TRANSACTION
Avg Check	Shows the average amount of each check per location	CUSTOMER_TRANSACTION
# New Customers	Shows the total number of new customers per card transaction	

Customer Program by Location Report The Customer Program Comparison by Location report is a drill-down report from the Customer Program Summary Report. This report is accessed by clicking the By Location link in the right most column of the report. This report displays information about a selected card program by location. The Customer Program by Location Report is separated into three sections:

- ◆ Number of Visits section
- ◆ Locations Visited section
- ◆ Location section

Since many organizations have multiple locations, this report shows the frequency by which card account holders visit those various locations. It can help to determine if some locations are being more or less proactive toward the distribution and use of iCare Gift and Loyalty Card Programs.

Template

- ◆ CustomerLocation.xml

Example

Customer Program by Location

Number of Visits: # Customers							
	# Customers	%	# Visits	%	Total Spend	%	Spend/Visit
Gift Card Totals:	227	100.00%	231	100.00%	18,463.27	100.00%	79.93
	224	98.68%	1	96.97%	18,663.27	101.08%	83.32
	2	0.88%	2	1.73%	(200.00)	-1.08%	(50.00)
	1	0.44%	3	1.30%	0.00	0.00%	0.00
Locations Visited: # Customers							
	# Customers	%	# Locations	Total Spend	%	Spend/Visit	
	227	100.00%	1	18,463.27	100.00%	79.93	
Location							
	# Customers	%	# Visits	%	Total Spend	%	Spend/Visit
Atlantic City	20	8.81%	20	8.66%	4,103.28	22.22%	205.16
	20	100.00%	1	100.00%	4,103.28	100.00%	205.16
Charlotte	19	8.37%	20	8.66%	611.04	3.31%	30.55
	18	94.74%	1	90.00%	661.04	108.18%	36.72
	1	5.26%	2	10.00%	(50.00)	-8.18%	(25.00)
Coral Gables	20	8.81%	20	8.66%	513.21	2.78%	25.66
	20	100.00%	1	100.00%	513.21	100.00%	25.66
Denver	11	4.85%	13	5.63%	(112.95)	-0.61%	(8.69)
	10	90.91%	1	76.92%	(112.95)	100.00%	(11.30)
	1	9.09%	3	23.08%	0.00	0.00%	0.00

Field	Description	Table
Number of Visits		
Card Program	Displays the name of the card program	ICARE_PROGRAM
# Customers	Shows the number of customers using the card program Drills down to the Customer Activity by Visits Report	CUSTOMER_TRANSACTION
%	Shows the percentage of card program account holders by card program	

Field	Description	Table
# Visits	Shows the number of visits by card program account holders	CUSTOMER_TRANSACTION
%	Shows the percentage of visits by card program account holders by individual card programs	
Total Spend	Shows the total amount spent by card program account holders	CUSTOMER_TRANSACTION
%	Shows the percentage of amounts spent by account holders by individual card programs	
Spend/Visit	Shows the ratio of amount spent per visit for card account holders	CUSTOMER_TRANSACTION
Locations Visited		
# Customers	Displays the name of the locatiOn where a card program was used	CUSTOMER_TRANSACTION
%	Shows how many customers per location used a card program	
Locations	Show the percentage of card program account holders using their cards at specified locations with respect to those other locations	LOCATION_HIERARCHY
Total Spend	Shows the number of visits per location wherein a card program was used	CUSTOMER_TRANSACTION
%	Shows the percentage of visits wherein a card program was used with respect to other locations where card programs were used	
Spend/Visit	Shows the total amount spent on those cards at the specified locations	CUSTOMER_TRANSACTION
Location		
Location	Displays the name of the locatiOn where a card program was used	LOCATION_HIERARCHY
# Customers	Shows how many customers per location used a card program Drills down to the Customer Activity by Location Report	CUSTOMER_TRANSACTION

Field	Description	Table
%	Show the percentage of card program account holders using their cards at specified locations with respect to those other locations	
# Visits	Shows the number of visits per location wherein a card program was used	CUSTOMER_TRANSACTION
%	Shows the percentage of visits wherein a card program was used with respect to other locations where card programs were used	
Total Spend	Shows the total amount spent on those cards at the specified locations	CUSTOMER_TRANSACTION
%	Shows the percentage of card program amount usage at with respect to amounts spent at other locations	
Spend/Visit	Shows the amount per visit spend for each card program account holder	CUSTOMER_TRANSACTION

Customer Program by Day Part Report The Customer Program Comparison by Day Part report is a drill-down report from the Customer Program Summary Report. This report is accessed by clicking the By Day Part link in the right most column of the report. This report displays information about a selected card program by previously configured day parts, like lunch or breakfast, in order to see if there are more popular times of day when card programs are being used.

Template

- ◆ CustomerDayPart.xml

Example

Customer Program by Day Part

Day Part	# Customers	%	# Visits	%	Total Spend	%	Spend/Visit
GC_2675 Totals:	30	100%	61	100%	173.52	100%	2.84
	3	10.0%	3	4.9%	21.00	12.1%	7.00
Open	12	40.0%	25	41.0%	57.40	33.1%	2.30
	3	100.0%	1	100.0%	21.00	100.0%	7.00
	6	50.0%	1	24.0%	26.01	45.3%	4.34
	3	25.0%	3	36.0%	0.91	1.6%	0.10
	2	16.7%	2	16.0%	29.84	52.0%	7.46
	1	8.3%	6	24.0%	0.64	1.1%	0.11
Mid Day	9	30.0%	13	21.3%	40.12	23.1%	3.09
	7	77.8%	1	53.8%	40.12	100.0%	5.73
	2	22.2%	3	46.2%	0.00	0.0%	0.00
Dinner	10	33.3%	15	24.6%	70.13	40.4%	4.68
	8	80.0%	1	53.3%	55.30	78.9%	6.91
	1	10.0%	4	26.7%	(15.88)	-22.6%	(3.97)
	1	10.0%	3	20.0%	30.71	43.8%	10.24
Close	2	6.7%	2	3.3%	6.00	3.5%	3.00
	2	100.0%	1	100.0%	6.00	100.0%	3.00

Field	Description	Table
Day Part	Displays the name of the day part being evaluated	DAY_PART
Card Program	Displays the name of the card program	ICARE_PROGRAM
# Customers	Shows the number of customers per day part that used a card program	CUSTOMER_TRANSACTION
%	Shows the percentage of customers using card programs with respect to other day parts	CUSTOMER_TRANSACTION
# Visits	Shows the number of visits per day part that used a card program	CUSTOMER_TRANSACTION
%	Shows the percentage of visits using card programs with respect to other day parts	CUSTOMER_TRANSACTION
Total Spend	Shows the total amount spent per day part on checks where card programs were used	CUSTOMER_TRANSACTION
%	Shows the percentage of amounts spent per day part on checks where card programs are used with respect checks from other day part	CUSTOMER_TRANSACTION
Spend/Visit	Shows the average amount spent per visit by day part for checks with card programs used.	CUSTOMER_TRANSACTION

Customer Recency, Frequency, and Monetary Value Rankings

Template:
♦ CustomerRFMSummary.xml

Example:

Customer Recency, Frequency and Monetary Value Rankings								
Totals:	Net Sales	% of All Net Sales	Checks	% of All Checks	Average Check	Customers	Visit Frequency	Avg Per Customer
All Checks	126,097.18		6,753		18.67			
CARD	93,496.58	74.1%	3,508	51.9%	26.65	2,670	1.31	35.02

Field	Description	Table
Totals	Displays the totals per program type	
Net Sales	Displays the net sales associated with the card program	CUSTOMER_TRANSACTION
% of All Net Sales	Displays the percentage of sales affected by that card program	CUSTOMER_TRANSACTION
Checks	Displays the number of checks affected by that card program	CUSTOMER_TRANSACTION
% of All Checks	Displays the percentage of checks in comparison to all checks affected by that card program	CUSTOMER_TRANSACTION
Average Check	Displays the average amount spent per check	CUSTOMER_TRANSACTION
Customers (Recency)	Drills down to the Customer Recency Report.	CUSTOMER_TRANSACTION
Visit Frequency (Frequency)	Drills down to the Customer Frequency Report.	CUSTOMER_TRANSACTION
Ave Per Customer (Monetary)	Drills down to the Customer Monetary Value Ranking Report.	CUSTOMER_TRANSACTION

Customer Recency Report

Template:
♦ CustomerRecencyDtl.xml

Example:

Customer Recency Report

Customer Rank	Date Range	Customers	Checks	Net Sales	% of Program Net Sales	Cumulative % of Net Sales	Visit Frequency (#/Cust)	Average Check (\$/Checks)	Avg Per Customer (\$/Cust)
9	06/19/2008 - 06/20/2008	267	1,150	32,117.68	18.52%	18.52%	4.31	27.93	120.29
8	06/19/2008 - 06/19/2008	267	725	19,453.13	11.22%	29.74%	2.72	26.83	72.86
7	06/19/2008 - 06/19/2008	267	678	21,366.22	12.32%	42.06%	2.54	31.51	80.02
6	06/19/2008 - 06/19/2008	267	656	20,956.19	12.08%	54.14%	2.46	31.95	78.49
5	06/19/2008 - 06/19/2008	267	577	16,305.70	9.40%	63.55%	2.16	28.26	61.07
4	06/19/2008 - 06/19/2008	267	602	14,107.73	8.14%	71.68%	2.25	23.43	52.84
3	06/19/2008 - 06/19/2008	267	562	14,975.68	8.64%	80.32%	2.10	26.65	56.09
2	06/19/2008 - 06/19/2008	267	520	12,639.62	7.29%	87.61%	1.95	24.31	47.34
1	06/19/2008 - 06/19/2008	267	513	11,915.93	6.87%	94.48%	1.92	23.23	44.63
0	06/19/2008 - 06/19/2008	267	492	9,577.98	5.52%	100.00%	1.84	19.47	35.87
CCARD Visits:		2,670	6,475	173,415.86	100%	Avg Cust:	2.43	26.78	64.95

Field	Description	Table
Customer Rank		
Date Range		
Customers		
Checks		
Net Sales		
% of Program Net Sales		
Cumulative % of Net Sales		
Visit Frequency (#/Cust)		
Average Check (\$/Check)		
Average Per Customer (\$/Cust)		

Customer Frequency Report

Template:

- ◆ CustomerFrequencyDtl.xml

iCare Customer Reports
Customer Recency, Frequency, and Monetary Value Rankings

Example:

Customer Frequency Report

Customer Rank	Customers	Checks	% of Program Checks	Net Sales	% of Program Net Sales	Cumulative % of Net Sales	Visit Frequency (#/Cust)	Average Check (\$/Checks)	Avg Per Customer (\$/Cust)
9	267	1,817	28.06%	48,145.91	27.76%	27.76%	6.81	26.50	180.32
8	267	809	12.49%	21,369.24	12.32%	40.09%	3.03	26.41	80.03
7	267	534	8.25%	15,099.24	8.71%	48.79%	2.00	28.28	56.55
6	267	534	8.25%	15,251.06	8.79%	57.59%	2.00	28.56	57.12
5	267	534	8.25%	14,825.73	8.55%	66.14%	2.00	27.76	55.53
4	267	534	8.25%	13,822.08	7.97%	74.11%	2.00	25.88	51.77
3	267	534	8.25%	14,578.94	8.41%	82.51%	2.00	27.30	54.60
2	267	534	8.25%	15,092.87	8.70%	91.22%	2.00	28.26	56.53
1	267	378	5.84%	9,273.57	5.35%	96.56%	1.42	24.53	34.73
0	267	267	4.12%	5,957.22	3.44%	100.00%	1.00	22.31	22.31
CCARD Visits:	2,670	6,475	100%	173,415.86	100%	Avg Cust:	2.43	26.78	64.95

Field	Description	Table
Customer Rank		
Customers		
Checks		
% of Program Net Sales		
Net Sales		
Cumulative % of Net Sales		
Visit Frequency (#/Cust)		
Average Check (\$/Check)		
Average Per Customer (\$/Cust)		

Customer Monetary Value Ranking Report

Template:

- ◆ CustomerMonetaryDtl.xml

Example:

Customer Monetary Value Ranking

Customer Rank	Customers	Checks	% of Program Checks	Net Sales	% of Program Net Sales	Cumulative % of Net Sales	Visit Frequency (#/Cust)	Average Check (\$/Checks)	Avg Per Customer (\$/Cust)
9	267	814	23.20%	29,961.92	32.05%	32.05%	3.05	36.81	112.22
8	267	393	11.20%	13,844.05	14.81%	46.85%	1.47	35.23	51.85
7	267	338	9.64%	10,978.22	11.74%	58.59%	1.27	32.48	41.12
6	267	296	8.44%	9,029.38	9.66%	68.25%	1.11	30.50	33.82
5	267	289	8.24%	7,630.46	8.16%	76.41%	1.08	26.40	28.58
4	267	283	8.07%	6,584.51	7.04%	83.46%	1.06	23.27	24.66
3	267	278	7.92%	5,478.27	5.86%	89.32%	1.04	19.71	20.52
2	267	273	7.78%	4,356.91	4.66%	93.98%	1.02	15.96	16.32
1	267	274	7.81%	3,453.81	3.69%	97.67%	1.03	12.61	12.94
0	267	270	7.70%	2,179.05	2.33%	100.00%	1.01	8.07	8.16
CCARD Visits:	2,670	3,508	100%	93,496.58	100%	Avg Cust:	1.31	26.65	35.02

Field	Description	Table
Customer Rank		
Customers		
Checks		
% of Program Net Sales		
Net Sales		
Cumulative % of Net Sales		
Visit Frequency (#/Cust)		
Average Check (\$/Check)		
Average Per Customer (\$/Cust)		

Customer Visits

This report shows customer visits by program cross referenced by location. Therefore, if an organization has two card programs, one of which is a gift card and the other is a loyalty card, the organization can see if the gift card is being used more at one location than another, and likewise with the loyalty card.

Template

- ◆ CustomerVisitsByRange.xml

Example

Customer Visits by Program and Location							
By Program	Strata	# Visits	%	# Customers	%	Total Spend	%
All Checks		1,398	100.00%			28,458.73	100.00%
Loyalty Program	1.00	751	53.72%	749		21,448.56	75.37%
	1	747	99.47%	747	99.73%	21,405.26	99.80%
	2-3	4	0.53%	2	0.27%	43.30	0.20%
GIFT	1.00	2	0.14%	2		45.00	0.16%
	1	2	100.00%	2	100.00%	45.00	100.00%
By Location	Strata	# Visits	%	# Customers	%	Total Spend	%
Cherry Hill		192	100.00%			3,788.24	100.00%
Loyalty Program	1.00	64	33.33%	64		1,813.46	47.87%
	1	64	100.00%	64	100.00%	1,813.46	100.00%
Fair Oaks		534	100.00%			11,043.42	100.00%
GIFT	1.00	2	0.37%	2		45.00	0.41%
	1	2	100.00%	2	100.00%	45.00	100.00%
Springfield		672	100.00%			13,627.07	100.00%
Loyalty Program	1.00	2	0.30%	2		17.96	0.13%
	1	2	100.00%	2	100.00%	17.96	100.00%

Field	Description	Table
By Program		
Card Program	Displays the name of the card program	ICARE_PROGRAM
Strata		
# Visits	Shows the number of times a card program was used	CUSTOMER_TRANSACTION
%	Shows the percentage times a card programs was used with respect to other card program	CUSTOMER_TRANSACTION
# Customers	Shows the number of customers used a card program	CUSTOMER_TRANSACTION
%	Shows the percentage of customers using card programs with respect to other card programs	CUSTOMER_TRANSACTION
Total Spend	Shows the total amount spent each time the card programs were used	CUSTOMER_TRANSACTION
%	Shows the percentage of amounts spent each time the card programs are used with respect to other card programs	CUSTOMER_TRANSACTION
By Location		
Location	Displays the name of the location where a card program was used	LOCATION_HIERARCHY

Field	Description	Table
Strata		
# Visits	Shows the number of times a card program was used at a location	CUSTOMER_TRANSACTION
%	Shows the percentage of times a card program was used at a locations with respect to other locations	CUSTOMER_TRANSACTION
# Customers	Shows the number of customers that used a card program at that location	CUSTOMER_TRANSACTION
%	Shows the percentage of customers that used a card program at that location respect to other location	CUSTOMER_TRANSACTION
Total Spend	Shows the total amount spent each time the card programs were used at that location	CUSTOMER_TRANSACTION
%	Shows the percentage of amounts spent each time the card programs were used at that location with respect checks from other locations	CUSTOMER_TRANSACTION

GPL Active Report

Template:

- ◆ ActiveRespondersReport.xml

Example:

Gift, Payment and Loyalty Active Report

Program	Active Records	Active Past 3 Mo.	% Total	Active 3-6 Mo.	% Total	Active 6-12 Mo.	% Total	Active 12-24 Mo.	In-Active	Never Active
CARD	1,989,579	55,446	2.8%	75,277	3.8%	181,455	9.1%	482,669	1,192,960	0
DONATE	772	234	30.3%	154	19.9%	199	25.8%	184	1	0
GIFT	35,839	2,401	6.7%	3,700	10.3%	3,237	9.0%	7,977	18,524	0

Field	Description	Table
Program		
Active Records		
Active Past 3 Months		
% Total		

Field	Description	Table
Active Past 3-6 Months		
% Total		
Active Past 6-12 Month		
% Total		
Active 12-24 Months		
Inactive		
Never Active		

Guest Charges

Use this page to filter your results. Select the letter that corresponds to the guests you would like to locate.

Template:

- ◆ GuestChargeNames.xml

Example:

Guest Charge Name Selection	
Last Name Begins With	
A	
B	
C	
D	
E	
F	
G	
H	
I	
J	
K	
L	
M	
N	
O	
P	
Q	
R	
S	
T	
U	
V	
W	
X	
Y	
Z	

Guest Charges After searching by the first letter of the last name, the results will appear.

Template:

- ◆ GuestChargeSummary.xml

Example:

Guest Charge Summary				
Guest Name	POS Reference	Transactions	Check Total	Avg Check
<u>Kepner M.</u>	0267000001219792	9	64.86	7.21
<u>Kennedy M.</u>	0267000000147679	3	46.03	15.34
<u>Kalil Mary</u>	0267000000446900	4	8.29	2.07
<u>Kate McKenna Mary</u>	0267000000897847	11	91.78	8.34
<u>Kay Krump Mary</u>	0267000002052340	4	40.19	10.05
<u>Kline Mary</u>	0267000001041652	3	12.20	4.07
<u>Kolberg Mary</u>	0267000000142969	28	346.49	12.37
<u>Kutruff Mary</u>	0267000001140743	6	30.47	5.08
<u>Marcie Karl</u>	0267000000925104	3	37.66	12.55
<u>Kayser Maria</u>	0267000000707177	2	11.43	5.72
<u>Kaufman Michael</u>	0267000002187262	4	47.76	11.94
<u>Kopac Michael</u>	0267000001434077	4	58.49	14.62

Field	Description	Table
Guest Name	Displays the guest's name	All Checks
POS Reference	Displays the guests account number	N/A
Transactions	Displays the number of transactions on the guest's loyalty card	N/A
Check Total	Displays the check total for all checks	N/A
Avg Check	Displays the average check total for the guests check	N/A

iCare Home Store Report

The iCare Home Store Report shows the number of card holders according to the stores they claim as their "home store". A home store is the store that the card holder either designated as their most frequently visited location or it is the location where the card was issued. The number of card holders per store is displayed.

Template

- ◆ iCareHomeStore.xml

Example

iCare Home Store Report	
Location	No Of Customers
College Park	2
Frederick	1
Germantown	3
Rockville	1
Olney	3
BWI Airport	1
Columbia	2
Annapolis	3
Bristow	1
Sterling	1
Washington	1

Field	Description	Table	Drill Down
Location	Displays the home store location for registered loyalty members	ICARE_LOCATIONS	iCare Home Store Report by Location Report
No. of Customers	Displays the number of loyalty members at that location	ICARE_LOCATIONS	N/A

iCare Home Store Report by Location Report The iCare Home Store Report Location displays more detailed information than its parent report, however it only displays the information for one location. The location selected from the iCare Home Store Report will determine the information displayed on the iCare Home Store Report by Location.

This report has no drill-downs.

Template

- ◆ iCareHomeStoreByLoc.xml

Example

iCare Home Store Report By Location Report			
Customer Name	Email Account	Registration Date	Account Number
Annapolis			
Mike Rose	mrose@micros.com	7/23/2008	0267000001378034
Janey Doe	janeydoe@micros.com	7/23/2008	0267000002095998
Johnny Doe	johnnydoe@micros.co	7/23/2008	0267000002097832

Field	Description	Table
Customer Name	Displays the full name of the iCare customer	ICARE_LOCATION
Email Account	Displays the email address provided by the customer during registration	ICARE_LOCATION
Registration Date	Displays the registration date	ICARE_LOCATION
Account Number	Displays the account holders iCare account number	ICARE_LOCATION

Loyalty Performance

The Loyalty Performance Report serves two purposes. Firstly, it ranks loyalty account holders by usage and assigns them low, medium, or high status. Account holders who use their loyalty accounts more frequently will be assigned a higher status. Secondly, This report breaks down and analyzes the loyalty account usage and compares account holders who have provided some sort of personal information versus those account holders who have yet to register their accounts.

Template:

- ◆ LoyaltyProgramPerformance.xml

Example:

Loyalty Program Performance Summary

Program	Total	%	Total	%	Average	% With	% With	%	
Visit Frequency	Customers	Transactions	Trans	Sales	Check	Addresses	Emails	Anonymous	
CARD	10,637	66,850	100.0%	1,854,529.62	100.0%	27.74	0.0%	0.0%	100.0%
Med (1 to 2 per Mo.)	801	801	1.2%	22,504.24	1.2%	28.10	0.0%	0.0%	100.0%
High (2+ per Mo.)	9,836	66,049	98.8%	1,832,025.38	98.8%	27.74	0.0%	0.0%	100.0%
GIFT	713	868	100.0%	11,623.84	100.0%	13.39	0.8%	0.3%	99.2%
Med (1 to 2 per Mo.)	583	583	67.2%	9,389.72	80.8%	16.11	1.0%	0.3%	99.0%
High (2+ per Mo.)	130	285	32.8%	2,234.12	19.2%	7.84	0.0%	0.0%	100.0%

Field	Description	Table
Program	Displays the program name.	ICARE_PROGRAM
Visit Frequency	Displays the visitation patterns of loyalty account holders by status. <ul style="list-style-type: none"> ◆ Low - < 1 per month ◆ Medium - 1-2 times per month ◆ High - 2+ time per month 	CUSTOMER_TRANSACTION
Total Customers	Displays the total number of customers who used their loyalty account within the specified period of time	CUSTOMER
Transactions	Displays the total number of transaction which were processed during the specified period of time	CUSTOMER_TRANSACTION
% Trans	Displays the percentage of loyalty transactions compared to non-loyalty transaction	N/A
Total Sales	Displays the total number of sales affected by loyalty account transactions	CUSTOMER_TRANSACTION
% Sales	Shows the percentage of sales affected by loyalty account transaction	N/A
Average Check	Displays the average check amount of all checks affected by loyalty transactions	CUSTOMER_TRANSACTION
% With Addresses	Shows the percentage of loyalty transactions processed with an address associated with the account versus loyalty accounts without addresses	N/A

Field	Description	Table
% With Emails	Shows the percentage of loyalty transactions processed with an email address associated with the account versus loyalty accounts without an email address	N/A
% Anonymous	Shows the percentage of loyalty transactions processed with no information on the loyalty accounts without versus loyalty accounts with information	N/A

New Customers

The purpose of the New Customers Report is to show all new customers on both an organizational level as well as a locations level. Users can review all checks and determine the ratio of customers purchasing and/or participating in a GPL Program.

Template

- ◆ NewCustomerProgram.xml

Example

New Customer Program Summary Report							
Totals:	# New Customers	# Checks	%	Total Spend	%	Avg Check	
All Checks		1,398		28,458.73		20.36	
LYLTY	180	180	13%	5,450.13	19%	30.28	
GIFT	2	2	0%	45.00	0%	22.50	
Location	# New Customers	# Checks	%	Total Spend	%	Avg Check	
Cherry Hill		192		3,788.24		19.73	
LYLTY	36	36	19%	1,137.49	30%	31.60	
Fair Oaks		534		11,043.42		20.68	
LYLTY	24	25	5%	440.29	4%	17.61	
GIFT	2	2	0%	45.00	0%	22.50	
Springfield		672		13,627.07		20.28	
LYLTY	142	142	21%	4,234.48	31%	29.82	

Field	Description	Table
Totals		
Card Program	Displays the name of the card program	ICARE_PROGRAM
# New Customers	Shows the total number of new card program customers	CUSTOMER_TRANSACTION

Field	Description	Table
# Checks	Shows the total number of checks with a new card program customer	CUSTOMER_TRANSACTION
%	Shows the percentage of new card program customers	CUSTOMER_TRANSACTION
Total Spend	Shows the total amount spent by new card program customers	CUSTOMER_TRANSACTION
Avg Check	Show the average amount spent by new card program customers	CUSTOMER_TRANSACTION
Locations		
Location	Displays the names of the locations where new card program customers originated	LOCATION_HIERARCHY
# New Customers	Shows the total number of new card program customers per location	CUSTOMER_TRANSACTION
# Checks	Shows the total number of checks with a new card program customer per location	CUSTOMER_TRANSACTION
%	Shows the percentage of new card program customers per location	CUSTOMER_TRANSACTION
Total Spend	Shows the total amount spent by new card program customers per location	CUSTOMER_TRANSACTION
Avg Check	Show the average amount spent by new card program customers per location	CUSTOMER_TRANSACTION

Program Sales by Employee

Template:

- ◆ ProgramSalesByEmp.xml

Example:

Program Sales by Employee							
Location	Employee	Program	Checks	Card Holder Name	Card Number	Subtotal	Check Total
Springfield							
Victoria			3				119.41
	GIFT		<u>1607</u>	Sheryl	0010200001584146	33.74	35.43
	GIFT		<u>1549</u>	Scott	0010200006222183	19.76	20.75
	GIFT		<u>1446</u>	DAVE	0010200003212903	14.96	15.71
James			2				55.08
	GIFT		<u>1428</u>	CAROLE	0010200005588160	23.33	29.50
	GIFT		<u>1552</u>	JAMES	0010200004383376	24.36	25.58
Laurel							
Billie			6	GIFT			182.83
	GIFT		<u>2904</u>	Robert	0010200000724451	37.62	43.88
	GIFT		<u>2958</u>	ZENAIDA	0010200003863455	24.66	32.00
	GIFT		<u>2965</u>	SHERETT	0010200001074718	25.55	31.09
	GIFT		<u>2892</u>	WILLIAM	0010300001308870	23.52	29.94
	GIFT		<u>2934</u>	ANGELO	0010200003015051	10.98	15.14
	GIFT		<u>2915</u>	JACK	0010200000817077	8.98	9.52
Monica			2				0.00
	GIFT		<u>2911</u>	New Customer	0010200006095917	0.00	0.00
	GIFT		<u>2912</u>	New Customer	0010200006095928	0.00	0.00

Field	Description	Table
Location	Displays the location of the iCare program activity	LOCATION_HIERA RCHY_ITEM
Employee	Displays the name of the employee responsible for the iCare program activity Note: the sample report has cropped out last names	EMPLOYEE
Program	Displays the name of the program the employee used toward a check	SubPROG
Checks	Shows how many checks with program activity the employee initiated Further breaks the checks down by check number	GUEST_CHECK_HI ST
Card Holder Name	Displays the name of the card holder Note: the sample report has cropped out last names	SubPROG
Card Number	Displays the card number of the card	SubPROG

Field	Description	Table
Subtotal	Displays the subtotal on the check(s) with the iCare program activity	GUEST_CHECK_HI ST
Tax	Displays the taxes associated with the check(s) with the iCare program activity	GUEST_CHECK_HI ST
Tip	Displays the tips associated with the check(s) with the iCare program activity	GUEST_CHECK_HI ST
Check Total	Displays the entire check total associated with the check(s) with the iCare program activity	GUEST_CHECK_HI ST

Top 100 Customers The Top 100 Customers report shows the top 100 card program customers by their visiting frequency or how much they spend. Furthermore, these two categories can be divided by either activity or customer details.

Template

- ◆ CustActivityTop100.xml

Example

Top 100 Customers				
Program	By Visits:		By Spend:	
All Programs	Activity Summary	Customer Details	Activity Summary	Customer Details
CREDIT	Activity Summary	Customer Details	Activity Summary	Customer Details
GIFT	Activity Summary	Customer Details	Activity Summary	Customer Details
ACCTS	Activity Summary	Customer Details	Activity Summary	Customer Details
DISC	Activity Summary	Customer Details	Activity Summary	Customer Details
Cash	Activity Summary	Customer Details	Activity Summary	Customer Details

Field	Description	Table
Program	Displays the name of the card program	ICARE_PROGRAM

Field	Description	Table
By Visits	Select either Activity Summary or Customer Details to see top 100 customer information based on the frequency of visitation Drills down to the Customer Activity Top 100 by Visits OR Customer Details Top 100 by Visits	
By Spend	Select either Activity Summary or Customer Details to see top 100 customer information based on the amount spent per customer Drills down to the Customer Activity Top 100 by Spend OR Customer Details Top 100 by Spend	

Customer Activity Top 100: By Visits or By Spend The Customer Activity Report shows information like frequency of use and typical spending habits of the account holder. Although both the Customer Activity Top 100 by Visits and by Spend show the exact same fields, the prioritization techniques are different. For the “By Visits” report, the most active visitors are listed first. The “By Spend” report shows account holders who have spent the most using the iCare Card Program.

In the examples below, notice how on the Top 100 by Visits report, the number one ranking goes to the account holder with 11 visits, whereas on the Top 100 by Spend report, the number one ranking goes to the person with over \$800 in sales.

Template

- ◆ CustActivityAllTop100Visits.xml
- ◆ CustActivityAllTop100Spend.xml

Example

Customer Activity Top 100 by Visits Report							
Customer	Ref Num	Start Date	Last Date	#Guests	Avg	# Trans	Total
CREDIT				265	1.00	265	20.57 5,449.91
New Customer	0123300000013597	11/3/2007	11/8/2007	11	1.00	11	3.44 37.81
New Customer	0123300000013611	4/27/2007	11/8/2007	9	1.00	9	(14.00) (125.98)

Customer Activity Top 100 by Spend Report							
Customer	Ref Num	Start Date	Last Date	#Guests	Avg	# Trans	Total
CREDIT				248	1.00	248	22.85 5,666.68
New Customer	0123300000037153	6/16/2007	11/7/2007	2	1.00	2	402.18 804.35
New Customer	0123300000042354	3/5/2007	11/10/2007	4	1.00	4	176.75 707.00
New Customer	0123300000026081	3/26/2007	11/11/2007	5	1.00	5	87.73 438.67
New Customer	0123300000031022	8/10/2007	11/1/2007	1	1.00	1	421.30 421.30
New Customer	0123300000036947	10/17/2007	11/12/2007	1	1.00	1	398.00 398.00
New Customer	0123300000021768	9/5/2007	11/5/2007	6	1.00	6	39.45 236.68
New Customer	0123300000021597	11/3/2007	11/3/2007	1	1.00	1	178.45 178.45

Field	Description	Table
Customer	Displays the customer's name (if entered in myiCard.net) Drills down to the Customer Transaction Report	CUSTOMER_TRANS ACTION
Ref Num	Displays the account number	CUSTOMER_TRANS ACTION
Start Date	Shows the first date the account was ever used	CUSTOMER_TRANS ACTION
Last Date	Shows the last time the card was used	CUSTOMER_TRANS ACTION
# Guests	Displays the number of guest on the check during the last transaction	CUSTOMER_TRANS ACTION
Avg	Displays the average number of guests the account holder brings every time the card is used	CUSTOMER_TRANS ACTION
# Trans	Shows the number of transactions that have occurred for that account	CUSTOMER_TRANS ACTION
Avg	Shows the average amount spend on that account each time	CUSTOMER_TRANS ACTION
Total	Displays the total amount spent on the account(s)	CUSTOMER_TRANS ACTION

Customer Details Top 100: By Visits or By Spend

The Customer Details by Top 100 Report shows customer information, provided they have accessed the myiCard.net website and updated their data. Also, a System Administrator may have updated this information manually through the portal. Similarly to how the Customer Activity Top 100, likewise the Customer Details by Top 100 prioritizes by either the customer with the most visits or the customer who has spent the most on the By Visits or By Spend reports, respectively.

In the examples below, notice how in the “By Visits” report, the customer with 6 transactions on his card is identified as the highest ranked customer, and on the “By Spend” report, the customer with \$100 spent is the highest ranked customer.

Template

- ◆ Customer Details Top 100 by Visits
- ◆ Customer Details Top 100 by Spend

Example

Customer Details Top 100 by Visits Report							
Customer	Address Line 1	Address Line 2	City	State	Postal Code	# Trans	Total
POINTS						14	155.89
New Customer						6	191.95
New Cust							
New Cust							

Customer Details Top 100 by Spend Report							
Customer	Address Line 1	Address Line 2	City	State	Postal Code	# Trans	Total
GCARD						182	1,343.04
New Customer						1	100.00
New Customer						10	56.47
New Customer						2	50.00
New Customer						4	36.66
New Customer						19	34.46
New Customer						1	30.00

Field	Description	Table
Customer	Displays the customer name if it has been updated in myiCard.net Drills down to the Customer Transaction Report	CUSTOMER_TRANSACTION
Address Line 1	Displays the customer address	CUSTOMER_TRANSACTION
Address Line 2	Displays the customer address	CUSTOMER_TRANSACTION
City	Displays the city in which the account holder lives	CUSTOMER_TRANSACTION
State	Displays the state in which the account holder lives	CUSTOMER_TRANSACTION
Postal Code	Displays the appropriate zip code for the account holder’s address	CUSTOMER_TRANSACTION
# Trans	Displays the number of times that account has been used for a card transaction	CUSTOMER_TRANSACTION
Total	Shows the monetary amount affected/used for that account for all transactions	CUSTOMER_TRANSACTION

Customer Transaction Report

This report is a drill-down from any the following:

The Customer Transaction Report shows detailed information for the top 100 card program account holders. There report has two portions, one which provides detailed customer data (if the customer has updated their information in the myiCard.net website) and the other which provides check transaction data.

This is the same Customer Transaction Report which was previously discussed. For more information on this report, please refer to the Customer Transaction Report details under the “Customer Transaction Report” on page 41.

Templates

- ◆ CustomerTransactions.xml

Example

Customer Transaction Report

Customer	Ref Num	Program	Address				
New Customer	0267500000039899	GC_2675					
E-Mail	Phone Number	Active	UDF1			UDF2	
		Y					
Customer	Date	Check	Location	Revenue Center	Guests	Discount Total	Total
New Customer	10/7/2007 6:45 PM	<u>985</u>	Belmont	Bar	0	0.00	20.00
New Customer	11/2/2007 8:03 PM	<u>493</u>	Belmont	Bar	0	0.00	30.71
New Customer	11/2/2007 8:05 PM	<u>951</u>	Belmont	Bar	0	0.00	(20.00)

iCare DB & Campaigning Reports

iCare DB & Campaigning Reports

The following reports are top level reports under the iCare DB & Campaigning Reports Category. They may or may not have drill-down reports:

- ◆ Active / Responders
- ◆ Campaign Performance
- ◆ Customer Acquisition
- ◆ Customer DB Programs
- ◆ Customer DB Universe
- ◆ Email Promotions

iCare Customer Reports are only available to those customers that have purchased the iCare Campaigning Product.

Active / Responders

There are three sections to the Active Responders Report:

1. Active Customers / Active Cards
2. New Customers / New Cards
3. Anonymous Customers

In each of the three sections, the information is the same, however it is filtered based on activity, registration date, and information provided.

Template:

- ◆ CA_ActiveResponders.xml

Example:

Customer Database Program Active/Responder Responses									
Active Customers / Active Cards:									
Customer Counts	Total	Active	Active	Active	Active	In-	Never		
Card Counts	Active	Past 3 Mo.	% Total	3-6 Mo.	% Total	6-12 Mo.	% Total	Active	Active
Loyalty Program	1,738	346	19.9%	255	14.7%	308	17.7%	11,011	71
	3	1	33.3%	0	0.0%	1	33.3%	3	1
B2B Issue (109)	270	49	18.1%	37	13.7%	53	19.6%	1,972	6
First Issue (104)	1,466	296	20.2%	218	14.9%	254	17.3%	9,050	68
Gift Cards	19	1	5.3%	3	15.8%	6	31.6%	14	0
	19	1	5.3%	3	15.8%	6	31.6%	14	0
New Customers / New Cards:									
Customer Counts	Total	New	New	New	New	New	New		
Card Counts	New	Past 3 Mo.	% Total	3-6 Mo.	% Total	6-12 Mo.	% Total		
Loyalty Program	50	0	0.0%	49	98.0%	1	2.0%		
B2B Issue (109)	1	0	0.0%	0	0.0%	1	100.0%		
First Issue (104)	49	0	0.0%	49	100.0%	0	0.0%		
Gift Cards	8	0	0.0%	0	0.0%	8	100.0%		
	8	0	0.0%	0	0.0%	8	100.0%		
Anonymous Customers:									
Customer Counts	Total	Active	Active	Active	Active	In-	Active		
Card Counts	Active	Past 3 Mo.	% Total	3-6 Mo.	% Total	6-12 Mo.	% Total	Active	
Loyalty Program	642	119	18.5%	310	48.3%	59	9.2%	3,230	
B2B Issue (109)	111	31	27.9%	10	9.0%	21	18.9%	642	
First Issue (00104..)	502	83	16.5%	299	59.6%	34	6.8%	2,142	
Unassigned Card Rule	29	5	17.2%	1	3.4%	4	13.8%	446	
Gift Cards	16,586	1,495	9.0%	1,796	10.8%	5,263	31.7%	27,458	
Gift First Issue (00100..)	16,583	1,494	9.0%	1,795	10.8%	5,263	31.7%	27,391	
Unassigned Card Rule	3	1	33.3%	1	33.3%	0	0.0%	67	

Field	Description	Table
Customer Counts	Displays the total number of customers with an account	CA_CUSTOMER
Card Counts	Displays the total number of customers, organized by card type	CA_CUSTOMER
Total Active	Displays the total number of customers with active accounts	CA_CUSTOMER
Active Past 3 Months	Shows customers who have had iCare activity within the past 3 months	CA_CUSTOMER
% Total	Displays the percentage of iCare activity in the past 3 months with respect to all iCare account holders	CA_CUSTOMER
Active 3-6 Months	Shows customers who have had iCare activity within the past 3-6 months	CA_CUSTOMER
% Total	Displays the percentage of iCare activity in the past 3-6 months with respect to all iCare account holders	CA_CUSTOMER
Active 6-12 Months	Shows customers who have had iCare activity within the past 6-12 months	CA_CUSTOMER

Field	Description	Table
% Total	Displays the percentage of iCare activity in the past 6-12 months with respect to all iCare account holders	CA_CUSTOMER
Inactive	Shows the number of iCare accounts which at one time were active but are now inactive	CUSTOMER
Never Active	Displays the number of iCare accounts which were never activated This field is only available for Active Customers / Active Cards	CUSTOMER

Addition & Retention

This report displays information organized by month. The first column will always display the current month. In our example below, the current month is August. The columns will continue on to display the previous five months (July, Jun, May, April, March). After five months, the final two columns display the previous 6-12 Month average and then the 12+ Month average.

Template:

- ◆ CA_AdditionRetention.xml

Example:

Customer Additions and Retentions Report								
Customers								
Active Customers								
New Customers	August	July	June	May	April	March	6-12 Mo.	12+ Mo.
August	15	0	0	0	0	0	0	0
July	20	99	0	0	0	0	0	0
June	40	181	668	0	0	0	0	0
May	342	1,572	2,500	9,400	0	0	0	0
April	292	1,235	1,869	2,457	7,763	0	0	0
March	209	950	1,457	1,988	2,454	7,193	0	0
6-12 Months	633	2,920	4,334	5,775	6,987	8,313	29,334	0
12+ Months	4,093	15,950	22,496	27,652	31,356	34,934	53,256	336,364
Total	5,644	22,907	33,324	47,272	48,560	50,440	82,590	336,364

Anonymous Customers								
Active Customers								
New Customers	August	July	June	May	April	March	6-12 Mo.	12+ Mo.
August	1,406	0	0	0	0	0	0	0
July	560	9,246	0	0	0	0	0	0
June	403	1,909	9,926	0	0	0	0	0
May	49	245	480	1,854	0	0	0	0
April	21	127	208	322	1,384	0	0	0
March	16	101	143	208	281	1,199	0	0
6-12 Months	146	616	978	1,368	1,753	2,399	11,506	0
12+ Months	371	1,229	1,682	2,058	2,374	2,706	5,087	82,301
Total	2,972	13,473	13,417	5,810	5,792	6,304	16,593	82,301

<u>Named & Anonymous Combined</u>	<u>New & Replacement Cards</u>
---------------------------------------	------------------------------------

Field	Description	Table
New Customers	Shows how many new iCare customers activated accounts	CA_ACCOUNT
Named & Anonymous Combined	Select this link to combine the named and anonymous categories and view the report as one consolidated group of information. See below.	
New & Replacement Cards	Select this link to view only new and replacement card information. See below.	

Sample Named & Anonymous Combined Report

Template:

- ◆ CA_AdditionCombined.xml

Combined Customer Addition and Retention Report								
All Customers								
	Active Customers							
New Customers	August	July	June	May	April	March	6-12 Mo.	12+ Mo.
August	1,421	0	0	0	0	0	0	0
July	581	9,345	0	0	0	0	0	0
June	444	2,091	10,594	0	0	0	0	0
May	391	1,817	2,980	11,254	0	0	0	0
April	313	1,362	2,077	2,779	9,147	0	0	0
March	225	1,051	1,600	2,196	2,735	8,392	0	0
6-12 Months	779	3,536	5,312	7,143	8,740	10,712	40,840	0
12+ Months	4,464	17,179	24,178	29,710	33,730	37,640	58,343	418,665
Total	8,618	36,381	46,741	53,082	54,352	56,744	99,183	418,665

Sample New & Replacement Cards Report

Template:

- ◆ CA_AdditionReplacement.xml

New & Replacement Card Report								
Issued Cards								
New Customers	August	July	June	May	April	March	6-12 Mo.	12+ Mo.
August	17	0	0	0	0	0	0	0
July	0	109	0	0	0	0	0	0
June	0	0	677	0	0	0	0	0
May	0	2	7	9,429	0	0	0	0
April	0	0	0	1	7,786	0	0	0
March	0	0	0	0	1	7,218	0	0
6-12 Months	0	0	0	3	13	43	29,702	0
12+ Months	1	9	24	38	84	332	3,665	373,169
Total	18	120	708	9,471	7,884	7,593	33,367	373,169

**Campaign
Performance**

Template:

- ◆ CA_CampaignPerformance.xml

Example:

Campaign Performance Summary									
Promotion Participation Card Type	Start Date	End Date	Targeted	Participants Count	Participants %	Num Trans	Avg # Trans	Life Net Sales	Avg Trans
BDAY COUPON									
Welcome	4/29/2008		0	0	0.0%	0	0.00	0	0.00
Missed You!	4/30/2008		0	0	0.0%	0	0.00	0	0.00
	4/29/2008		0	0	0.0%	0	0.00	0	0.00
Promotion Financials Card Type	Cannibalization %	Promo Sales	Food Cost	Promo Margin	Fixed	Promo Costs Target	Ttl Promo Redeem	Promo Cost	Promo Contribution
BDAY COUPON									
Welcome	0%	0	0	0	0	0	0	0	0
Missed You!	0%	0	0	0	0	0	0	0	0
	0%	0	0	0	0	0	0	0	0

Field	Description	Table
Promotion Participation		
Card Type	Displays the card /account type	CA_CUSTOMER_P ROGRAM
Start Date	Shows the start date of the campaign	CA_CUSTOMER_P ROGRAM
End Date	Shows the end date of the campaign	CA_CUSTOMER_P ROGRAM
Targeted		CA_CUSTOMER_P ROGRAM
Participant Count		CA_CUSTOMER_P ROGRAM
Participant %		CA_CUSTOMER_P ROGRAM
Num Trans	Displays the number of transactions that were initiated as the result of the campaign	CA_CUSTOMER_P ROGRAM
Avg # Trans		CA_CUSTOMER_P ROGRAM
Life Net Sales		CA_CUSTOMER_P ROGRAM
Avg Trans		CA_CUSTOMER_P ROGRAM
Participant Financials		
Cannibalization %		CA_CUSTOMER_P ROGRAM

Field	Description	Table
Promo Sales		CA_CUSTOMER_P ROGRAM
Food Cost		CA_CUSTOMER_P ROGRAM
Promo Margin		CA_CUSTOMER_P ROGRAM
Fixed		CA_CUSTOMER_P ROGRAM
Promo Costs Target		CA_CUSTOMER_P ROGRAM
Redeem		CA_CUSTOMER_P ROGRAM
Ttl Promo Cost		CA_CUSTOMER_P ROGRAM
Promo Contribution		CA_CUSTOMER_P ROGRAM

Customer Acquisition

This report displays information organized by month. The first column displays all responses. The second column will always display the current month. In our example below, the current month is August. The columns will continue on to display the previous two months (July, Jun). After two months, the final three columns display the previous 3-6 Month average, 6-12 Month average, and then the 12+ Month average.

Template:

- ◆ CA_AquisitionReport.xml

Example:

Customer Database Universe Acquisition Report (Includes active, inactive, and never active)							
Summary	Total	August	July	June	Mar-May	Sep-Feb	12+ Mo.
Total Responses	730,464	0	0	4,262	22,655	37,087	657,558
Unique Customers Responding [May not total across]	596,092	0	0	4,262	22,641	33,430	531,018
New Customers	596,092	0	0	4,261	22,833	29,862	539,066
Campaign	Total	Responses					
Promotion	Responses	August	July	June	Mar-May	Sep-Feb	12+ Mo.
Loyalty Clubs	412,932	0	0	4,262	22,655	34,952	351,063
Holiday	607	0	0	1	4	2	600
To Go	11,008	0	0	0	50	1	10,957
Holiday Cards	12,552	0	0	0	0	0	12,552
Original Card	362,463	0	0	4,261	22,601	34,948	300,653
Sweeps	19,878	0	0	0	0	0	19,878
Spring 2005 Mailer	4,554	0	0	0	0	0	4,554
Spring 05 Mailer (108 Cards)	4,554	0	0	0	0	0	4,554
Transfer	148,180	0	0	0	0	0	148,180
Other promotions	148,180	0	0	0	0	0	148,180

Field	Description	Table
Summary	Displays the overview or totals for the campaign	CA_CUSTOMER
Total Responses	Shows the total number of responses	CA_PROMO_CUSTOMER_RESPONSE
Campaign	Displays the name of the campaign	CA_CAMPAIGN
Promotion	Displays the name of the promotion	CA_PROMOTION
Total Responses	Shows the total number of responses	CA_PROMO_CUSTOMER_RESPONSE

Customer DB Programs

Template:

- ◆ CA_DBProgramReport.xml

Example:

Customer Database Program Report					
Customer Records:		Customers			
Number Unique Records	387,079				
Data Quality:		Customers	%		
Number with Names	386,099	99.7%			
Number with Name & Address	381,817	98.6%			
Number with Email Addresses	241,994	62.5%			
Number with Name, Addr & Email	237,778	61.4%			
Active Enrollments:		Customers	%	Cards	%
Gift Cards	19	0.0%	19		
<i>Customers w 2+ cards</i>			19	0.0%	
Inactive Enrollments:		Customers	%		
Loyalty Program	10,096	84.2%			
Gift Cards	5	20.8%			
Never Active Enrollments:		Customers	%		
Loyalty Program	71	0.6%			
Gift Cards	0	0.0%			
All Enrollments:		Customers	%	Cards	%
Loyalty Program	11,991	3.1%	13,247		
<i>B2B Issue (109)</i>			6	0.0%	
<i>First Issue (104)</i>			2,143	0.6%	
<i>Customers w 2+ cards</i>			11,098	2.9%	
Gift Cards	24	0.0%	24		
<i>Customers w 2+ cards</i>			24	0.0%	
Anonymous Customers (Gift, Payment and Loyalty cards without associated customers):				Cards	%
Loyalty Program			3,718	23.6%	
Gift Cards			36,013	99.8%	
Anonymous Customers showing no card activity within the past 30 days:				Cards	%
Loyalty Program			3,658	23.3%	
Gift Cards			35,395	98.1%	

Field	Description	Table
Customer	Shows the total number of unique customer records	CA_CUSTOMER
Data Quality		CA_CUSTOMER
Customers		CA_CUSTOMER
%		CA_CUSTOMER
Active Enrollments	Shows the total number of active customer enrollments	CA_CUSTOMER_PROGR AM

Field	Description	Table
Customers	Displays the total number of customers with active, live accounts	CA_CUSTOMER_PROGR AM
%	Displays the percentage of customers with live active accounts versus those customers with inactive accounts	CA_CUSTOMER_PROGR AM
Cards	Shows the total number of cards associated with the live, active accounts.	CA_CUSTOMER_PROGR AM
%	Shows the percentage of active customers with cards.	CA_CUSTOMER_PROGR AM
Inactive Enrollments	Displays the number of registered recipients whose accounts are inactive.	CA_CUSTOMER_PROGR AM
Customers	Displays the total number of customers with inactive accounts	CA_CUSTOMER_PROGR AM
%	Displays the percentage of customers whose accounts are inactive versus live active accounts.	CA_CUSTOMER_PROGR AM
Never Active Enrollments	Displays the number of recipients who opted to not enroll in the program	CA_CUSTOMER_PROGR AM
Customers	Displays the total number of customers who opted to not enroll in the program	CA_CUSTOMER_PROGR AM
%	Displays the percentage of customers who opted to not enroll in the program versus those who did enroll	CA_CUSTOMER_PROGR AM
All Enrollments	Displays the total number of all enrollees in the program	CA_CUSTOMER_PROGR AM
Customers	Display the total number of all enrollees in the program	CA_CUSTOMER_PROGR AM

Field	Description	Table
%	Displays the percentage of all enrollees in the program versus those who did not enroll in the program	CA_CUSTOMER_PROGR AM
Cards	Shows the total number of cards associated with all enrolled customers	CA_CUSTOMER_PROGR AM
%	Shows the percentage of active enrollees with cards.	CA_CUSTOMER_PROGR AM
Anonymous Customers	Displays the total number of active customers who are anonymous	ICARE_ACCOUNT
Cards	Displays the total number of cards associated with these active anonymous customers	ICARE_ACCOUNT
%	Displays the percentage of anonymous active customers versus non-anonymous active customers	ICARE_ACCOUNT
Anonymous Customers showing no activity	Displays the total number of inactive customers who are anonymous	ICARE_ACCOUNT
Cards	Displays the total number of cards associated with these active anonymous customers	ICARE_ACCOUNT
%	Displays the percentage of anonymous inactive customers versus non-anonymous inactive customers	ICARE_ACCOUNT

**Customer DB
Universe**

Template:

- ◆ CA_DBCampaignUniverse.xml

Example:

Customer Database Universe Report		
Customer Records:		
Number Unique Records	Count	% Total
	587,190	
Data Quality:		
Number with Names	Count	%
Number with Name & Address	582,723	99.2%
Number with Email Addresses	574,439	97.8%
Number with Name, Addr & Email	290,600	49.5%
	281,933	48.0%
Responses By Campaign:		
Total Responses:	Count	%
	721,562	100%
<u>Loyalty Clubs</u>	412,932	57.2%
Holiday Cards	12,552	1.7%
Sweeps	19,878	2.8%
Original Card	618	0.1%
To Go	11,008	1.5%
Holiday	607	0.1%
<u>Spring 2005 Mailer</u>	4,554	0.6%
Spring 05 Mailer (108 Cards)	4,554	0.6%
<u>Transfer</u>	148,180	20.5%
Other promotions	148,180	20.5%

Field	Description	Table	Drill Down
Customer Records	Displays the total number of customer records in the database.	CA_CUSTOMER	N/A
Count	Displays the total number of customer records in the database.	CA_CUSTOMER	N/A
% Total		CA_CUSTOMER	N/A
Data Quality		CA_CUSTOMER	N/A
Count		CA_CUSTOMER	N/A
% Total		CA_CUSTOMER	N/A
Responses by Campaign	Shows the total number of responses from email recipients	CA_PROMO_CUSTOMER_RESPONSE	Customers by Campaign Report

Field	Description	Table	Drill Down
Count	Shows the total number of responses from email recipients, organized by campaign.	CA_PROMO_CUSTOMER_RESPONSE	N/A
% Total	Shows the percentages of responses from email recipients, organized by campaign.	CA_PROMO_CUSTOMER_RESPONSE	N/A

Customer by Campaign Report The Customers by Campaign Report is the drill-down report from the Customer Database Universe Report. It is accessed by selecting one of the Program links

Template:

- ◆ CA_DBCampaignDetail.xml

Example:

Customers by Campaign		
Spring 2005 Mailer Records:		
Number Unique Records	4,554	100.0%
Number Duplicate Records	1	0.0%
Data Quality:		
Number with Names	4,554	100.0%
Number with Name & Address	4,553	100.0%
Number with Email Addresses	1,446	31.8%
Number with Name, Addr & Email	1,445	31.7%
Number with Card Numbers	4,554	100.0%
Invalid Card Numbers	1	0.0%
Records By State:		
<u>VA</u>	2,654	58.3%
<u>MD</u>	1,702	37.4%
<u>NJ</u>	188	4.1%
<u>DC</u>	7	0.2%
-	1	0.0%
<u>MD</u>	1	0.0%
<u>NJ</u>	1	0.0%

Field	Description	Table	Drill Down
Program Name	Displays the program name	CA_CAMPAIGN	N/A
Count	Shows how many customers exist in each program	CA_CUSTOMER	
% Total	Shows the percentage break down of customers by program	CA_CUSTOMER	N/A
Data Quality		CA_CUSTOMER	N/A
Count		CA_CUSTOMER	
% Total		CA_CUSTOMER	N/A
Records by State	Displays the number of customers the by state that were targeted by the campaign	CA_CUSTOMER	Customers by Campaign, State, and Postal Code

Field	Description	Table	Drill Down
Count		CA_CUSTOMER	
% Total		CA_CUSTOMER	N/A

Customers by Campaign, State, and Postal Code Report

The Customers by Campaign, State, and Postal Code Report is the drill-down report from the Customers by Campaign Report. It is accessed by selecting the state abbreviation link from the Customers by Campaign Report.

Template:

- ◆ CA_DBCampZip.xml

Example:

Customers by Campaign, State and Postal Code		
DC Spring 2005 Mailer Records:		
	Count	% Total
Number Active Records	7	100.0%
Number Inactive Records	0	0.0%
Data Quality:		
	Count	% Active
Number with Addresses	7	100.0%
Number with Email Addresses	3	42.9%
Number with Names	7	100.0%
Number with Card Numbers	7	100.0%
Invalid Card Numbers	0	0.0%
Active Records By Zip:		
	Count	% Active
20007	4	57.1%
20007-1382	1	14.3%
20007-2311	1	14.3%
20016-3304	1	14.3%

Field	Description	Table	Drill Down
Program Name	Displays the program name	CA_CAMPAIGN	N/A
Count	Displays the number of registered user by category	CA_CUSTOMER	N/A

Field	Description	Table	Drill Down
% Total	Displays the percentage of registered user by category compared to other categories	CA_CUSTOMER	N/A
Data Quality		CA_CUSTOMER	N/A
Count		CA_CUSTOMER	N/A
% Active		CA_CUSTOMER	N/A
Active Records by Zip	Displays the number of active customers by their registered zip code.	CA_CUSTOMER	Campaign Customer Detail by Postal Code
Count	Displays the total number of customers by their registered zip code	CA_CUSTOMER	N/A
% Active	Displays the total percentage of customers by their registered zip code versus inactive customers	CA_CUSTOMER	N/A

Campaign Customer Detail by Postal Code

The Campaign Customer Detail by Postal Code Report is the drill-down report from the Customers by Campaign, State, and Postal Code Report. It is accessed by selecting the Active Records Zip Code link from the Customers by Campaign, State, and Postal Code. Report.

Template:

- ◆ CA_DBCampZipDetail.xml

Example:

Campaign Customer Detail by Postal Code						
Offer and Location	Customer Name	Address	City	State	Postal Code	Email
Spring 2005 Mailer						
	BRUCE SMITH	4062 MANSION DR NW	WASHINGTON	DC	20007	chathams@yahoo.com
	PETER JONES	4407 HADFIELD LN NW	WASHINGTON	DC	20007	peter@yahoo.com
	DAVID DOE	4416 Q ST NW	WASHINGTON	DC	20007	
	EDWARD GREEN	3059 Q ST NW	WASHINGTON	DC	20007	weidenfeld@yahoo.com

Field	Description	Table
Customer Name	Displays the customers/account holder's name	CA_CUSTOMER
Address	Displays the street address the account holder provided via myiCard.net during registration	CA_CUSTOMER
City	Displays the city of residence the account holder provided via myiCard.net during registration	CA_CUSTOMER
State	Displays the state of residence the account holder provided via myiCard.net during registration	CA_CUSTOMER
Postal Code	Displays the postal code for the mailing address the account holder provided via myiCard.net during registration	CA_CUSTOMER
Email	Displays the email address the account holder provided via myiCard.net during registration	CA_CUSTOMER

Email Promotions

This report displays how many emails were sent per promotions. It also displays how many recipients opened the email, as well as how many recipients selected the opt out function.

Template:

- ◆ OfferEmailResponse.xml

Example:

Email Promotion Response Summary						
Campaign Promotion Offer	Sent	Opened	% Opened	Avg Hours to Open	Unsubscribed	% Unsubscribed
Welcome	1,029	277	26.9%	13.1	0	0.0%
Welcome	1,029	277	26.9%	13.1	0	0.0%
Welcome Email	<u>1,029</u>	<u>277</u>	26.9%	13.1	0	0.0%

Field	Description	Table	Drill Down
Campaign	Displays the name of the campaign.	CA_PROMOTION_CUSTOMER	N/A
Promotion	Displays the name of the promotion associated with the campaign.	CA_PROMOTION_CUSTOMER	N/A
Offer	Displays the type of offer sent via the campaign promotion	CA_OFFER	N/A
Sent	Displays the number of emails that were sent per campaign promotion	CA_PROMOTION_CUSTOMER	Email Offers Sent Summary
Opened	Displays the number of emails that were opened by recipients per campaign promotion	CA_PROMOTION_CUSTOMER	Email Offer Receipt Detail
% Opened	Displays the percentage of emails that were opened by recipients per campaign promotion versus unopened emails	CA_PROMOTION_CUSTOMER	N/A
Avg Hours to Open	Displays the average length in hours to open and display the email.	CA_PROMOTION_CUSTOMER	N/A

Field	Description	Table	Drill Down
Unsubscribed	Displays the number of individuals who unsubscribed as a result of the email	CA_PROMOTION_CUSTOMER	N/A
% Unsubscribed	Displays the percentage of individuals who unsubscribed as a result of the email versus those who did not unsubscribe from the mailing list.	CA_PROMOTION_CUSTOMER	N/A

Email Offers Sent Summary This report displays a more detailed description of the email campaign recipients. This report is sorted by zip code.

Template:

- ◆ OfferEmailSentSummary.xml

Example:

Email Offers Sent Summary			
Offer State & Postal Code	Sent Count	From Date	Sent Between To Date
Welcome Email	1,029		
-	1,027		
20854	39	7/15/2008 2:13 PM	7/22/2008 2:13 PM
22124	33	7/15/2008 2:13 PM	7/22/2008 2:13 PM
19468	26	7/15/2008 2:13 PM	7/22/2008 2:13 PM
20814	25	7/15/2008 2:13 PM	7/22/2008 2:13 PM
20832	20	7/15/2008 2:13 PM	7/22/2008 2:13 PM
20148	18	7/15/2008 2:13 PM	7/22/2008 2:13 PM
20874	18	7/15/2008 2:13 PM	7/22/2008 2:13 PM
19711	17	7/15/2008 2:13 PM	7/22/2008 2:13 PM
20147	17	7/15/2008 2:13 PM	7/22/2008 2:13 PM
25414	17	7/15/2008 2:13 PM	7/22/2008 2:13 PM
20176	15	7/15/2008 2:13 PM	7/22/2008 2:13 PM
25425	15	7/15/2008 2:13 PM	7/22/2008 2:13 PM

Field	Description	Table	Drill Down
Offer	Displays the type of offer email that was sent	CA_PROMOTION_CUSTOMER	N/A
State & Postal Code	Displays the state and/or postal code for the recipient	CA_CUSTOMER	Email Offers Sent Detail

Field	Description	Table	Drill Down
Sent Count	Shows how many email offers were sent	CA_CUSTOMER	N/A
Sent Between From Date	Shows the starting date for the range of the email offer	CA_PROMOTION_CUSTOMER	N/A
Sent Between To Date	Shows the end date for the range of the email offer	CA_PROMOTION_CUSTOMER	N/A

Email Offers Sent Detail This report shows a more detailed description of the recipients at their zip codes who have provided their personal information.

This report is a drill-down from the Email Offers Sent Summary.

Template:

- ◆ OfferEmailSentDetail.xml

Example:

Email Offers Sent Detail							
Offer and Location	Customer Name	Address	City	State	Postal Code	Offer Sent Date-Time	Open
Welcome Email							
	21046				2		
	Mike Rose				21046	mrose@micros.com 7/19/2008 2:06 PM	Yes
	Janey Doe				21046	janeydoe@micros.com 7/22/2008 2:13 PM	Yes

Field	Description	Table
Offer and Location	Displays the offer type and the location to where it was sent	CA_OFFER
Customer Name	Displays the customer's name provided during registration	CA_CUSTOMER
Address	Displays the customer's address provided during registration	CA_CUSTOMER
City	Displays the customer's city of residence provided during registration	CA_CUSTOMER
State	Displays the customer's state of residence provided during registration	CA_CUSTOMER
Postal Code	Displays the customer's postal code provided during registration	CA_CUSTOMER

Field	Description	Table
Email	Displays the customer's email address provided during registration	CA_CUSTOMER
Offer Sent Date Time	Displays a date-time stamp of when the email offer was sent to the customer	CA_PROMOTION_CUSTOMER
Open	Displays whether or not the email was opened by the customer. If the email was opened, then this column will say Yes. If the email was not opened, then this column will say No.	CA_OFFER_RECEIPT

**Email Offer Receipt
Detail**

This report is a drill-down from the top level Email Promotions Report.

Template:

- ◆ OfferEmailReceiptDetail.xml

Example:

Email Offer Receipt Detail						
Offer and Location	Address		Postal	Email	Offer Sent	Response
Customer Name	City	State	Code		Date-Time	Time (hrs)
Test Welcome Email						
			281			
18074			1			
Mikey Rose			18074	mrose@micros.co	7/15/2008 2:13 PM	41.3
19079			1			
Johnny Doe			19079	johnnydoe@micros	7/18/2008 2:04 PM	1.0
19341			1			
Janey Doe			19341	janeydoe@micros.com	7/19/2008 2:06 PM	0.9
19426			2			
Jeffery NoName			19426	j_no_name@micros.com	7/21/2008 2:11 PM	1.2
Suzie Sample			19426	ssample@micros.com	7/15/2008 2:13 PM	1.2
19446			2			
John Smith			19446	jrsmith@micros.com	7/17/2008 2:02 PM	6.0
Jen Smith			19446	jenny@micros.com	7/15/2008 2:13 PM	1.8

Field	Description	Table
Offer and Location	Displays the offer type and the location to where it was sent	CA_OFFER
Customer Name	Displays the customer's name provided during registration	CA_CUSTOMER
Address	Displays the customer's address provided during registration	CA_CUSTOMER
City	Displays the customer's city of residence provided during registration	CA_CUSTOMER

Field	Description	Table
State	Displays the customer's state of residence provided during registration	CA_CUSTOMER
Postal Code	Displays the customer's postal code provided during registration	CA_CUSTOMER
Email	Displays the customer's email address provided during registration	CA_CUSTOMER
Offer Sent Date Time	Displays a date-time stamp of when the email offer was sent to the customer	CA_PROMOTION_CUSTOMER
Response Time (hrs)	Displays the length of time, in hours, it took the recipient to respond to the email	CA_PROMOTION_CUSTOMER and CA_OFFER_RECEIPT