

Loyalty Product Report Training Handbook

Exchange Solutions User Documentation

Table of contents:

Loyalty Product Report Training Handbook

- Contents
- List of Dashboards
- Common Filters
 - Data Cube Dimensions
- Annotations and Footnotes
- Dashboards
 - Balances and Composition
 - Functionality
 - Ranges
 - Functionality
 - Goodwill Issuance
 - Functionality
 - Membership Trends
 - Functionality
 - Promotion Summary
 - Functionality
 - Filters
 - Example scenarios
 - Promotion Details
 - Functionality
 - Filters
 - Gameplay Rewards
 - Example scenarios

of Gameplays Awarded in the KPI section reflects the total number of gameplays earned.

- Frequency Offer Details
 - Functionality
 - Filters
 - Overall Summary metrics
 - Charts and visualizations
- Promotion Impact
 - Functionality
 - Example scenarios
- Sales Activity
 - Functionality

- Filters (common to all views)
- KPI and Trends – Line Charts
- Detail Analysis, Product Details
- Category 1 to 4
- Select Metric Group
- Data Cube – Table
- KPI & Data Cube, Product Details
- Select Metric
- View Metric By
- Current vs. Last Periods – Line Chart
- Running Total – Current vs. Last Periods – Line Chart
- Compared By
- Select Metric 1
- Select Metric 2
- Comparison by Dimension – Box Plot Chart
- Metric 1 vs. Metric 2 – Line Chart
- Sales Activity – Product Details
 - Functionality
 - Filters (common to all views)
 - Product Performance – KPI section
 - Total vs. Loyalty Metric Comparison & Penetration
 - Average Loyalty vs. Non-Loyalty Metric Comparison
 - Distribution of Top N Selected Dimension by Selected Metric
 - YoY Comparison of Selected Metric by Product Category
 - Data Cube – Table
- Expiry Forecasting
 - Functionality
 - Months of No Activity Trend – Bar Chart
- Vendor Billing
 - Functionality
 - Filters
 - Summary KPIs
 - Vendor Contribution
 - Trends Over Time
 - Data Cube
- Fraud Report – Members with Negative Balances
 - Functionality

- Table
- Membership Tiers
 - Functionality
- Loyalty Members
 - Functionality
 - Members Overview View
 - Additional Members Details View
 - Product Details View
 - Member Segmentation View
 - Member Segments Comparison View
 - Members Data Cube View
 - Navigation Bar
- Point Bank
 - Summary
 - Purchase Details
 - Redemption Details
- Points Lifecycle
 - Points Lifecycle Summary
 - Points FIFO Details
- Tier Rollover
 - Annotations and Footnotes
 - Summary Section
 - Details for All Periods section
 - Trend Explorer section

Loyalty Product Report Training Handbook

Contents

- [List of Dashboards](#)
 - [Common Filters](#)
 - [Annotations and Footnotes](#)
 - [Dashboards](#)
 - [Balances and Composition](#)
 - [Ranges](#)
 - [Goodwill Issuance](#)
 - [Membership Trends](#)
 - [Promotion Summary](#)
 - [Promotion Details](#)
 - [Frequency Offer Details](#)
 - [Promotion Impact](#)
 - [Sales Activity](#)
 - [Sales Activity – Product Details](#)
 - [Expiry Forecasting](#)
 - [Vendor Billing](#)
 - [Fraud Report – Members with Negative Balances](#)
 - [Membership Tiers](#)
 - [Loyalty Members](#)
 - [Point Bank](#)
 - [Points Lifecycle](#)
 - [Tier Rollover](#)
-

This document provides an overview of the features and filters included in the Loyalty Product Dashboard, and summarizes how to work with the data available in the various dashboards and visualizations.

List of Dashboards

1. Balances and Composition
 2. Ranges
 3. Goodwill Issuance
 4. Membership Trends
 5. Promotion Summary
 6. Promotion Details
 7. Frequency Offer Details (related to Promotion Details)
 8. Promotion Impact
 9. Sales Activity
 10. Sales Activity – Product Details (related to Sales Activity)
 11. Expiry Forecasting
 12. Vendor Billing
 13. Fraud Report – Members with Negative Balance
 14. Membership Tiers
 15. Loyalty Members
 16. Point Bank
 17. Points Lifecycle
 18. Tier Rollover
-

Common Filters

The dashboard includes numerous filters that let you select different options and combinations to analyze data. As you make selections, subsequent filters update automatically to show only the options relevant to your previous choices.

Most drop-down filters let you select multiple values at once using the **Apply** button, and most default to **All**. Some filters also let you type a value directly in a search box.

The most common filters available across dashboards are described below. Individual dashboards may have additional filters, which are covered in their respective sections.

Date: Lets you analyze results within a specific time range. Click the date box to open the calendar and select your desired period. The Date filter takes priority over other date-related filters, so changes apply before other filters take effect. For example, selecting 10/8/2021–11/6/2021 limits all data to that range.

Date Group: Lets you view the report at different time dimensions, such as Date, Fiscal Week, Fiscal Month, Fiscal Period, Fiscal Quarter, and Fiscal Year. The default is Daily. Use the Date Element filter to change the time dimension.

Date Element: Shows available months, quarters, or years based on your Date Group and Number of Periods to Show selections. You can select multiple elements using the **Apply** button. The visualizations refresh to reflect your selection.

Number of Periods to Show: Lets you choose how many of the most recent periods to display. The maximum is 100 periods, determined by the Date Elements selection. The default is the latest 10 periods. You can also uncheck **All** in Date Elements and manually select specific periods.

Data Cube Dimensions

The data cube lets you analyze rewards across different dimensions or combinations of dimensions, similar to a drill-up and drill-down capability.

Category 1 to 4: Let you modify the dimensions in the data cube for analysis. Each category contains the same dimension values, including a dash (-), which performs no further drill-down. Creating different category combinations lets you view data at any level of granularity and compare results across the dimension hierarchy.

The data cube also includes a highlighting feature for intuitive comparison across time and selected categories. Each metric uses independent color scaling — the darker the color (blue or red), the larger the value (positive or negative). Color highlighting applies to the entire metric column, not individual sections.

Annotations and Footnotes

All dashboards include a list of useful notes. Hover over the title or logo image in the top-left of the dashboard to view them. Review these notes before using each dashboard.

Dashboards

Balances and Composition

This dashboard provides a summary of rewards composition — including Rewards Earned, Rewards Burned, Net Rewards, and Liability (both positive and negative) — across reporting periods.

Functionality

This dashboard lets you view and compare rewards and liability across reporting periods from daily to yearly using the Date Group and Date Element options. The color-highlighting feature makes it easier to compare values across time for the selected metric.

Rewards Earned and Rewards Burned include all point types. A positive number under the Redeemed column in the Earned section occurs when a customer redeems points and then returns the items — the points are returned to the customer. Similarly, Base and Bonus under the Burned section show a negative number when a customer returns items and the issued points are taken back. To get the total for any point type, sum the points column across both Earned and Burned sections for that point type.

You can switch between Points and Reward \$ (the dollar value of points) depending on your needs.

- **Report Type:** Choose to view a single section or all sections. Options are Balances, Compositions, and All (default). Selecting Balances shows only rewards-related metrics; selecting Compositions shows only liability-related metrics.

Note: Changing the Date Group may cause the report to appear blank. If this happens, reselect either Balances or Composition from the Report Type drop-down, as not all date group options are available for both report types.

- **Metric Group:** Options in this filter are linked to the Report Type selection. Available options include Negative Liability, Net Liability, Net Rewards, Positive Liability, Rewards Burned, and Rewards Earned. The default is All.

- **Highlighted Metric:** Select a single metric to highlight in the table for intuitive comparison across time. For example, selecting Composition – Rewards Earned – Base highlights each row based on its Base Rewards value — the larger the value, the stronger the shade of blue.
 - **Data Table:** Shows an overview and comparison of Balances and Composition metrics across the selected date group. The default shows the latest 10 date element periods, configurable up to 100.
 - **Tooltip in Data Table:** Hovering over a cell in the table shows a summary of the selected metric value for that period.
-

Ranges

This dashboard provides a summary of rewards balance by range throughout the selected period.

Functionality

This dashboard lets you compare the overall rewards balance trend and the trend for a selected balance range at your chosen time dimension.

- **Rewards Range:** Highlights different balance ranges in color. Clicking a range highlights it in the bar chart and shows what percentage of the total rewards balance it represents for the selected period.
 - **Bar Chart:** Shows rewards across balance ranges at the selected time dimension. The value at the end of each bar is the total rewards balance for that period.
-

Goodwill Issuance

This dashboard provides details on all discretionary rewards given to program customers across reporting periods.

Functionality

Category selections let you view results by combinations of up to four different dimension values. Available categories include Agent, Account ID, Account Status, Channel, Reason, Transaction ID, and Store Number (where applicable).

Additional filters:

- **Account Status:** Select single or multiple account statuses such as Active, Suspended, or All (default).
 - **Agent:** Select single or multiple agents to see discretionary points issued by those agents. The default is All.
 - **Category 1 to 4:** Select dimension combinations to drill up or down into the results.
 - **Channel:** Select one or more channels through which points were issued, such as POS or Store.
 - **Reason:** Select one or more reasons for which points were issued.
 - **Total Rewards – Table:** Shows a detailed list of discretionary rewards based on selected category value combinations across time.
-

Membership Trends

This dashboard highlights acquisition, attrition, and membership size trends in both trend and detail comparison views throughout the selected period.

Functionality

This dashboard provides a trend comparison of a selected metric at your chosen time dimension, alongside a table with detailed data for QC.

- **Trends – Selected Metric:** The trend graph shows the selected metric over time. The title updates automatically based on your Show Graph selection.
 - **Show Graph:** Select a single metric to view its trend. The default is Existing Members.
 - **Membership Details:** A table showing details for all metrics based on the selected time periods.
-

Promotion Summary

This dashboard has two pages: Promotion Summary and Promotion Summary Details. The Promotion Summary page provides a summary view of all promotion transactions with completed offers in the

selected period. The Promotion Summary Details page lets you create a customized report to analyze campaign and promotion effectiveness across multiple dimensions.

Note: Completed Over Targeted % does not appear in the graph until All-Targeted is selected in the Group filter. Offer Completed Member and Offer Accepted Member are cumulative numbers up to the selected period.

Functionality

This dashboard provides summary-level insights into campaign and promotion activities. Clicking in the Details By section drills down into key metrics by various dimensions. The Promotion Summary Details page includes a highlighting feature for intuitive comparison across time.

Filters

- **Year and PTD Filter:** Select single or multiple years, or Program to Date (PTD).
- **Period Type:** Select a time dimension such as Fiscal Week or Program to Date. The default is Program to Date. Use the Period Value filter to select specific periods within the chosen dimension.
- **Period Value:** Shows available weeks or other time dimensions based on your Period Type selection. Only one element can be selected at a time. Visualizations refresh to reflect your selection.
- **Reporting Period Start Date / End Date:** Displays the start and end dates for the current analysis.
- **Group:** Select a single group: All-Mass, All-Targeted, or All. Targeted Members and Completed Over Targeted Rate only appear when All-Targeted is selected.
- **Details By (Promotion Summary):** Click a dimension such as LTC Indicator, Offer Type, Promo Audience, Reporting Identifier, or All to view key metrics broken down by that dimension. The dashboard automatically navigates to the Promotion Summary Details section, where the associated dimension values appear.
- **Details By (Promotion Summary Details):** Click a specific dimension value to analyze key metrics for that value only.
- **KPI Summary:** Provides an aggregated view of key metrics for a selected dimension. Click a dimension value to compare that metric across all dimension values over time.
- **Metric Comparison Table:** Provides a detailed comparison of the selected metric and dimension over time. In the example above, Offer Type is selected on the Promotion Summary page, and the associated value Activity Offer-Mass is selected on the Promotion Summary Details page. The KPI

Summary section then filters to show KPI metric values for Activity Offer-Mass only. Selecting Offer Completed Members populates the Metric Comparison table with the number of members who completed offers, broken down by offer type over time. Darker shades of blue indicate higher absolute values.

- **Go to Promotion Summary button:** Returns you to the Promotion Summary page.

Example scenarios

Find total active members since the program started

1. Select Program to Date in the Period Type filter in the KPI Summary section.
2. Select PTD in the Period Value filter in the KPI Summary section.

Find Completed Over Targeted Rate for offer type "Multiple-Targeted" in Fiscal Week 2022-W50

1. Click Offer Type under Details By in the Promotion Summary page.
2. Click Multiple-Targeted under Details By in the Promotion Summary Details page.
3. Select Fiscal Week in the Period Type filter in the KPI Summary section.
4. Select 2022-W50 in the Period Value filter in the KPI Summary section.

Find the number of Offer Accepted Members in Fiscal Week 2022-W50

1. Click LTC Indicator under Details By in the Promotion Summary page.
2. Click Non LTC-Targeted under Details By in the Promotion Summary Details page.
3. Select Fiscal Week in the Period Type filter in the KPI Summary section.
4. Select 2022-W50 in the Period Value filter in the KPI Summary section.

Compare Total Completed Transaction Sales by offer type from Fiscal Week 2022-W41 to 2022-W50

1. Click Offer Type under Details By in the Promotion Summary page.
2. Click Completed Transactions Sales under KPI Summary in the Promotion Summary Details page.
3. Select Fiscal Week in the Period Type filter in the Metric Comparison section.
4. Select 2022-W41 to 2022-W50 in the Period Value filter in the Metric Comparison section.

Promotion Details

This dashboard provides a detailed view of all promotion activities, including a Top 10 Offers measurement and the ability to create customized reports to analyze campaign and promotion effectiveness across reporting periods.

Functionality

The dashboard lets you analyze campaign and promotion effectiveness over time. The **Frequency Offers** button opens a separate dashboard with details specific to frequency offers.

The Top 10 section measures how effective the top 10 offers are relative to all other offers, and provides a direct comparison among those top 10 offers for the selected metrics.

The highlighting feature in the Promotion Details section lets you intuitively compare results across time and selected categories.

Filters

- **Year and PTD Filter:** Select single or multiple years and PTD.
- **Period Type:** Select a time dimension. The default is Program to Date.
- **Period Value:** Shows available time periods based on your Period Type selection. Supports multiple selections. Visualizations refresh to reflect your selection.
- **Display Date:** Select single or multiple promotion display dates.
- **Promo Start Date / Promo End Date:** Select single or multiple promotion start and end dates.
- **Business Unit:** Select single or multiple business units.
- **Vendor Funded:** Filter by whether the promotion was vendor-funded (True, False, or All).
- **Event ID:** Select single or multiple event IDs or codes such as Welcome.
- **Promo Audience:** Select single or multiple audiences such as Mass, Static Targeted, or All.
- **Reward Type:** Select single or multiple reward types such as Threshold, Points Per Unit, Multiplier, or All.

Note: If no data is available for a reward type, it will not appear in the filter. Recently added offer types include Multi Behavior, Dollar Off, and Percentage Off. These appear when live

data is available.

- **Offer ID:** Select single or multiple offer codes.
- **Offer Description:** Select single or multiple offer descriptions.
- **Reporting Identifier:** Select single or multiple reporting identifiers.
- **LTC Indicator:** Filter by whether the offer is LTC, Non LTC, or All.
- **Vehicle ID:** Select single or multiple vehicle IDs or codes.
- **Partner Linked:** Single-select filter to view data for partners, no partner, or both (All).
- **Frequency Offer:** Filter results by whether the offer is a frequency or continuity offer.
- **Employee:** Filter to view employee or non-employee customer data.
- **Multi-Tier Offer:** Filter results by whether the offer is a multi-tier offer.
- **Referrals Program:** A filter in the header filter section to narrow results to referral promotions (when available). Referral promotions show both Referrer and Referee-related promotions. Offer Completed Members and Bonus Points are the key metrics for these promotions.
- **KPI:** Provides an aggregated summary of key metrics for analysis.
- **Select Dimension:** Choose a single dimension to use in the TOP 10 bar chart, Share of TOP 10 from Overall donut chart, and Distribution of TOP 10 donut chart.
- **Select TOP Metrics:** Choose a single metric to use in the TOP 10 bar chart, Share of TOP 10 Offers from Overall donut chart, and Distribution of TOP 10 Offers donut chart.
- **TOP 10 – Bar Chart:** Lists the top 10 offer codes, descriptions, or reporting identifiers for comparison based on the selected metric. Darker green indicates a greater value. Hover over an offer to see its metric trend for the selected period range.
- **Share of TOP 10 Offers from Overall – Donut Chart:** Compares the top 10 offers against all other offers for the selected metric. Hover over an offer to see its metric trend and aggregated market share percentage.

- **Distribution of TOP 10 Offers – Donut Chart:** Compares the top 10 offers against each other for the selected metric. Clicking a bar in the TOP 10 chart or the Distribution donut highlights that offer across all three charts and shows its metric value versus remaining offers.

Clicking a bar in the **Top 10** chart or a segment in the **Distribution of Top Offers** donut chart highlights the selected offer across all three charts, and shows a comparison of the metric value and market share percentage between the selected offer and all remaining offers.

- **Select Category:** Select single or multiple metric groups to show in the data cube table. All metrics are shown by default.
- **Tier Name:** Multiselect filter for the promotion details table. View all tiers or select specific tiers.
- **Promotion Details – Table:** Provides detailed metric comparison across time with color highlighting. The darker the color (blue or red), the greater the absolute value. Click a metric in the table to see its trend.

Gameplay Rewards

Gameplay rewards are tracked in a two-step process.

Step 1: Offers that award a gameplay

Search for the gameplay phrase in the Offer Code filter. For such offers:

- **# of Gameplays Awarded:** Total number of gameplays earned.
- **Offer Completed Members:** Number of members who were awarded the gameplay.

Step 2: Offer codes showing a gameplay was completed and points were earned

Gameplay-rewarded points are tagged with Offer Type = Ad Hoc Reward. Filter offer codes related to gameplay to find:

- **Bonus Points:** Total points earned by members from gameplay bonus points issued.
- **Completed Offer Transactions:** Number of gameplays completed by members and rewarded.
- **Offer Completed Members:** Number of members who played the game and were rewarded with points.

Example scenarios

Compare Completed Transaction Sales for kitchen-related offers from Fiscal Week 2022-W47 to 2022-W52

1. Select 2022 in the Year and PTD Filter.
2. Select Fiscal Week in the Period Type filter.
3. Select 2022-W47 to 2022-W52 in the Period Value filter.
4. Uncheck All in the Offer Description filter, search for "Kitchen," and select all kitchen-related descriptions.
5. Review aggregated Completed Transaction Sales in the KPI section.
6. Review Completed Transaction Sales in the Promotion Details section for further breakdown. Click a metric to see its trend.

Compare the top 10 offer codes of Redeem reward type by Promotional Item Sales in Fiscal Week 2022-W45

1. Select 2022 in the Year and PTD Filter.
2. Select Fiscal Week in the Period Type filter.
3. Select 2022-W45 in the Period Value filter.
4. Select Redeem in the Reward Type filter.
5. Select Offer Code in the Select Dimension filter in the TOP 10 section.
6. Select Promo Item Sales in the Select TOP Metrics filter in the TOP 10 section.
7. Click individual offer codes in the TOP 10 bar chart to update the donut charts.

View gameplay metrics for offer code CATBOOM_ENROLL with type Ad hoc Reward

1. Select CATBOOM_ENROLL in the Offer ID filter.
2. Select Ad hoc Reward in the Reward Type filter.
3. Bonus Points Issued in the KPI section reflects total points earned from gameplay.
4. Completed Offer Transactions (Promo Eligible) reflects the number of gameplays completed.
5. Offer Completed Members reflects the count of members who played and were rewarded.

View gameplay award metrics for offers with "gameplay" in the Offer Code

1. Search for and select offers containing "gameplay" in the Offer Code filter.

2. **of Gameplays Awarded in the KPI section reflects the total number of gameplays earned.**

3. Offer Completed Members in the KPI section reflects the count of members who were awarded gameplay.

Frequency Offer Details

This dashboard provides both summary and detail views of frequency offers based on the selected promotion start date. It shows how far along members are in completing the offer requirements, captured in five completion percentage ranges: 1–25%, 26–50%, 51–75%, 76–99%, and $\geq 100\%$.

Functionality

This dashboard gives insights into the overall performance of frequency offers and how easy or difficult it is for members to complete them. It accumulates frequency offer data based on the promotion start date. All metrics for an offer code are tied to its promotion start date. Period Value lets you search by promotion start date. All sales, margin, and derived metrics are based on total qualifying sales and margin — any member targeted who makes a qualifying purchase is tracked, regardless of whether they complete the offer.

Filters

- **Business Unit:** Select single or multiple business units.
- **Period Type:** Select a time dimension. The default is Program to Date.
- **Period Value:** Shows available time dimensions based on your Period Type selection. Supports multiple selections.
- **Promo Start Date / Promo End Date:** Select single or multiple promotion start and end dates.

Overall Summary metrics

- **Participated Members:** Members eligible or participating in completing the offer.
- **Promo Eligible Sales:** Qualifying product sales eligible for the offer code.
- **Promo Eligible \$ Value:** Qualifying product margin eligible for the offer code.
- **Promo Eligible Transactions:** Transactions where the offer code applies.
- **Completed Members:** Total members who completed the offer requirements.
- **Bonus Pts Issued:** Bonus points distributed for completing the frequency offer.
- **Bonus Pts \$:** Dollar value of bonus points issued.
- **Avg # of Items in Cart:** Total eligible sales divided by total eligible transactions.
- **Avg Basket Size:** Average number of items per transaction.
- **Active Offers:** Total frequency offers where members are actively participating.

Charts and visualizations

- **Completion Distribution among 4 major KPIs:** Four donut charts showing completion percentage distribution for the four major KPIs.
- **Frequency Offer KPI by Type:** Shows KPI metrics by offer type against different completion percentages. Switch between metrics using the drop-down.
- **Metric for Color Band:** Choose a metric to color the heatmap. Darker color indicates higher distribution.
- **Member Distribution by Offer Type:** Shows the distribution of members across different offer types.
- **Top N:** Adjust the number of promotion codes shown in the Top Frequency Offer views (default: 10).
- **Select Dimension:** Choose a single dimension for analysis in the Top N and All Offer Codes distribution views.
- **Select Metric:** Choose a single metric for analysis in the Top N and All Offer Codes distribution views.
- **Top 10 Frequency Offer:** Shows top frequency offers based on the selected metric, in offer code or description mode.
- **All Offer Codes Distribution:** Shows the distribution of the selected dimension for the selected metric.
- **Frequency Offer Detail Summary table:** Provides detailed metric comparison across time, with color highlighting based on individual value ranges. This table uses only its own set of filters:
 - **Period Type:** Select a time dimension.
 - **Period Value:** Select specific periods based on your Period Type.

- **Offer Code:** Select single or multiple offer codes.
- **Offer Description:** Select single or multiple offer descriptions.
- **Completion%:** Select single or multiple completion percentages.

The % of Mbrs by Completion metric shows the distribution of members among different completion percentages within a specific frequency offer.

Promotion Impact

This dashboard provides a comparison and measurement of promotion impact. It highlights both the top and bottom 10 offers by promotion effectiveness and lets you create customized reports to compare individual campaigns and promotion effectiveness across reporting periods.

Functionality

This dashboard shares many design elements with the Promotion Details dashboard. Refer to that section for filter descriptions that also apply here. The Top/Bottom N section measures how effective the top and bottom N offers are compared to all others, and enables direct comparison among them for a selected metric.

- **Top/Bottom N:** Select the number of dimensions to compare in the charts (maximum 20).
- **Select Dimension:** Choose a single dimension — Offer Code, Offer Description, or Reporting Identifier — for analysis in the bar charts.
- **Select Metrics:** Choose a single metric for analysis in the bar charts.
- **Offers With Completion:** Analyze completed offers only, or all offers.
- **Top/Bottom N – Bar Charts:** Lists top or bottom N items for comparison based on the selected metric. Darker green indicates a higher positive value; darker red indicates a higher negative value. Click a bar to highlight that offer in the Share of Top/Bottom N chart.
- **Share of Top/Bottom N – Bar Charts:** Compares Top/Bottom N items against all others based on the selected metric.
- **Promotion Performance KPI – Table:** Shows detailed campaign performance metrics across time. Blue-teal or green indicates positive values; red indicates negative values. The darker the

color, the greater the value.

- **Analysis Metrics:** Choose a single metric for the box plot chart.
- **Color By:** Choose a dimension to highlight the box plots by.
- **Number of Periods to Show (max 24):** Select how many recent periods to display in the box plot. The default is 12.
- **Promotion Analysis – Box Plot Chart:** Provides an intuitive view of the distribution and spread of campaign offer performance for the selected metric. Click a data point to see that offer code's performance in the Promotion Performance KPI table.

Example scenarios

Compare Incremental Sales trend for offer "Welcome Bonus" from Fiscal Week 2022-W47 to 2022-W52

1. Select 2022 in the Year and PTD Filter.
2. Select Fiscal Week in the Period Type filter.
3. Select 2022-W47 to 2022-W52 in the Period Value filter.
4. Select Incremental Sales in the Analysis Metrics filter in the Promotion Analysis section.
5. Select Offer Code in the Color By filter.
6. Click WelcomeBonus in the color legend to highlight its trend. Click the data point in the graph to review all metrics for that offer in the Promotion Performance KPI section.

Compare top and bottom 10 offer codes by Incremental Sales in Fiscal Week 2022-W45

1. Select 2022 in the Year and PTD Filter.
2. Select Fiscal Week in the Period Type filter.
3. Select 2022-W45 in the Period Value filter.
4. Select Offer Code in the Select Dimension filter in the Top/Bottom 10 section.
5. Select Promo Item Sales in the Select Metrics filter.
6. Click individual offer codes in the Top/Bottom 10 bar chart to update the Share of Top/Bottom from Overall charts.

Sales Activity

This dashboard provides an instant, customizable sales tracker. It includes high-level trending on key performance metrics and detailed comparison across dimension combinations using a data cube.

Functionality

The dashboard displays KPIs and trends for overall sales and transaction data, and presents key metrics based on the selected category combinations in a data cube.

Filters (common to all views)

- **Transaction Date:** Select the desired time period of transactions to summarize points for.
- **Date Group:** Select a date group from the available options.
- **Date Element:** Select specific days, weeks, months, or other periods based on the date grouping selected in the previous filter.
- **Terminal Type:** Select a terminal type.
- **Primary Payment Type:** Select a payment method, such as Cash, Debit, or Cheque.
- **Channel:** Select a payment channel, such as Online, Offline, or Ecom.
- **Store Division:** Select a division to filter the list of stores within that division.
- **Store Province:** Select the province of the store to analyze.
- **Store Number:** Select from a list of store numbers based on the previous filters.
- **Store Name:** Select the store name corresponding to the selected store number.
- **Outlier Flag:** Choose to include or exclude outlier transactions. Outliers are flagged based on a percentile threshold applied to transaction amount or points, depending on the dashboard.
- **Loyalty Identifier:** Select the type of identifier used to identify members at the time of transaction.

KPI and Trends – Line Charts

Each KPI card displays two pieces of information: the aggregated value and its associated trend over the selected periods. Hover over the trend line to view an enlarged graph for more detailed analysis.

For example, Total Sales reached \$531,906,703 over the latest 5 fiscal weeks, with a peak of \$120.29M in Fiscal Week 2022-W14.

Detail Analysis, Product Details

Use these navigation buttons to jump to the Detail Analysis page or the Product Details page.

Category 1 to 4

Select up to four dimensions to add to the data cube for analysis. Use these selections to drill up and down the data across various categories.

- **Loyalty Identifier:** Shows the identifier used to identify a loyalty member during a transaction, such as Loyalty ID, email, or phone number.
- **Terminal Type:** A configurable field that displays customized values based on provided business logic. Potential use cases, depending on client-provided logic, include identifying Self Checkout, In-Store POS, or Outside Store POS terminals.

Select Metric Group

Select all metrics or the relevant metrics for a single section to display in the data cube table. All metrics are shown by default.

Data Cube – Table

Provides detailed metric comparison across time based on the selected category combinations. Metrics are highlighted based on their individual value ranges — the darker the color (blue or red), the greater the absolute value (positive or negative).

KPI & Data Cube, Product Details

Use these navigation buttons to jump to the KPI & Data Cube or Product Details pages.

Select Metric

Select a single metric for analysis in the Current vs. Last Periods and Running Total Current vs. Last Periods line charts.

View Metric By

Select a single dimension for analysis in the Current vs. Last Periods and Running Total Current vs. Last Periods line charts.

Current vs. Last Periods – Line Chart

Provides a direct day-to-day, week-to-week, or month-to-month comparison between the current and previous periods based on the selected metric.

Running Total – Current vs. Last Periods – Line Chart

Provides a cumulative comparison between the current and previous periods based on the selected metric.

Compared By

Select a single dimension for analysis in the Comparison by Dimension box plot chart and Metric 1 vs. Metric 2 line chart.

Select Metric 1

Select a single metric for analysis in the Comparison by Dimension box plot chart and Metric 1 vs. Metric 2 line chart.

Select Metric 2

Select a single metric for analysis in the Metric 1 vs. Metric 2 line chart.

Comparison by Dimension – Box Plot Chart

Provides an intuitive view of the locality, spread, and skewness of the selected dimensions based on the metric selected in Select Metric 1. For example, you can view total sales broken down by store province over the latest 10 fiscal weeks. Click a value in the color legend at the bottom to highlight that dimension in the chart.

Metric 1 vs. Metric 2 – Line Chart

Provides a direct trend comparison between Select Metric 1 and Select Metric 2. Each line is color-coded to match its associated metric filter, and the label beside each line shows the metric value for the latest period. Clicking a data point in the Comparison by Dimension box plot chart filters the line chart to show only the selected dimension. For example, clicking Store Province = AB in the box plot displays the Total Sales and Loyalty Sales Penetration trend for Alberta over the selected fiscal weeks.

Sales Activity – Product Details

The Sales Activity – Product Details dashboard provides a deep dive into the sales performance of product categories within the scope of the business. In addition to key performance metrics and their trends, this dashboard compares loyalty and non-loyalty metrics across different product categories.

Note: Click any product category in the top two charts to filter the KPIs, trends, Total vs. Loyalty Metric & Penetration chart, and Avg Loyalty vs. Non-Loyalty per Transactions chart for that specific category.

Functionality

Filters (common to all views)

- **Transaction Date:** Select the desired time period of transactions to summarize points for.
- **Date Group:** Select a date group from the available options.
- **Date Element:** Select specific days, weeks, months, or other periods based on the date grouping selected in the previous filter.
- **Terminal Type:** Select a terminal type.
- **Primary Payment Type:** Select a payment method, such as Cash, Debit, or Cheque.
- **Channel:** Select a payment channel, such as Online, Offline, or Ecom.
- **Store Division:** Select a division to filter the list of stores within that division.
- **Store Province:** Select the province of the store to analyze.
- **Store Number:** Select from a list of store numbers based on the previous filters.
- **Store Name:** Select the store name corresponding to the selected store number.
- **Outlier Flag:** Choose to include or exclude outlier transactions. Outliers are flagged based on a percentile threshold applied to transaction amount or points, depending on the dashboard.
- **Loyalty Identifier:** Select the type of identifier used to identify members at the time of transaction.

Product Performance – KPI section

The KPI strip displays loyalty and total metrics for the selected time period, along with the loyalty penetration rate for applicable metrics (Sales, Margin, and Quantity). The penetration percentage shows the share of loyalty relative to the overall value for each relevant metric. The last two sections of the strip show the dollar values of Bonus and Base Rewards, which are configurable based on the program — either as points or as the dollar value of points. Use the filters at the top of the dashboard to view these trends for any period type or custom date range.

Total vs. Loyalty Metric Comparison & Penetration

This chart provides a visual comparison of the total vs. loyalty absolute values for the selected metric across each product category. Hover over the Loyalty or Total bar to view the loyalty and total distribution share for that product category. Click a category name to filter the KPI section and the Average Loyalty vs. Non-Loyalty Comparison chart on the right for that specific category. For example, clicking Product Category 30 updates the Average Comparison chart and the entire KPI section to reflect that category's values.

Average Loyalty vs. Non-Loyalty Metric Comparison

This chart compares the loyalty vs. non-loyalty averages of KPIs across categories based on the selected comparison metric (Sales, Margin, or Quantity). A reference line for each category indicates the total value of the selected metric, letting you compare loyalty, non-loyalty, and total values side by side. This chart shares the same click functionality as the Total vs. Loyalty Metric Comparison & Penetration chart above. For example, clicking **Product Category 8** updates the Total vs. Loyalty Comparison chart and the KPI section to reflect that category's values.

Distribution of Top N Selected Dimension by Selected Metric

This chart identifies the top N product categories based on the selected metric, and shows the share of those categories across the selected dimension (Store Province/State or Channel). Use this chart to identify which product categories perform best in each province, state, or channel, or to compare top-performing categories overall. For example, hovering over the stacked bar for Nova Scotia shows the percentage share of the selected metric for the top 10 product categories in that province.

YoY Comparison of Selected Metric by Product Category

This chart shows time period comparison trends — such as fiscal weeks within a year — for the selected metric across a single product category at a time. The blue line represents the current year

and the green line represents the previous year. Use this chart to compare performance across different seasons and evaluate how a product category performs year over year.

Data Cube – Table

This table lets you view the raw numbers used in the reports across a given date element and product category. Display metrics as aggregated values or broken down by any applicable combination of dimensions to slice and dice the data as needed.

Expiry Forecasting

This dashboard provides forecasting data for reward expiry.

Functionality

Use this dashboard to forecast when rewards are expected to expire, enabling proactive management of reward liability.

Fiscal Period: Select one or more fiscal periods to display in the dashboard visualizations. Similar to the Date Element filter in the Common Filters section, use the **Apply** button to confirm multiple selections.

Months to Expire: Select one or more values for the number of months until expiry for analysis in the bar chart.

Months of No Activity: Select one or more values for the number of months of no activity for analysis in the bar chart. For example, Months of No Activity = 24 (Months) – Months to Expire.

Months of No Activity Trend – Bar Chart

This bar chart categorizes points about to expire based on the number of months of no activity. The total points are labeled at the end of each bar, and the percentage value shows each category's share of total points within the same period. Use the highlighting feature to focus on a desired category and quickly identify the severity of points nearing expiry.

Vendor Billing

The Vendor Billing dashboard provides a deep dive into vendor performance and their associated offers. Use this dashboard to build a custom, self-serve view for analyzing points issued and quantity sold across various dimensions and reporting periods.

The dashboard consists of two pages. The first page provides a summarized view of vendors, their distribution, associated product categories, and metric trends. The second page offers slicing and dicing capabilities for building more granular reports across different dimensions and time periods.

Functionality

The Vendor Billing dashboard provides an aggregated view of key KPIs, letting you analyze and compare vendor performance across various time periods.

Filters

- **Business Unit:** Select single or multiple business units for analysis.
- **Fiscal Year:** Select single or multiple fiscal years for analysis.
- **Year: Period:** Select single or multiple year and month combinations for analysis.
- **Vendor Name:** Select a single vendor name for analysis.
- **Product Category:** Select single or multiple product categories for analysis.
- **Promotion Code:** Select single or multiple promotion codes for analysis.
- **Vehicle ID:** Select single or multiple vehicle IDs for analysis.
- **Event:** Select single or multiple events for analysis.
- **Frequency Offer:** Filter results by offer type — either frequency offer or continuity offer.

Summary KPIs

Shows an aggregated summary of key Vendor Billing KPIs.

Vendor Contribution

Lets you analyze data across different dimensions and metrics. Charts in this section support click-through drill-down — clicking a vendor name or product category filters the graphs to show only relevant information for that selection. Click again to revert to the original view.

Trends Over Time

This section supports the same click-through drill-down capability as the Vendor Contribution section. Clicking any data point in either graph — or in the Vendor Contribution section above — filters all

dashboard graphs to show relevant information for that selection.

- **Points Issued Over Time:** Shows total points issued over the latest 13 periods.
- **Total Quantity Sold vs. Quantity Sold with Offer:** Shows total quantity sold compared to quantity sold with an offer over the latest 13 periods.
- **Periods to Show:** Type a value to limit the number of periods displayed in the Trends Over Time section. The maximum value is 13.

Data Cube

Lets you analyze vendor billing data across up to eight dimensions. Categories 1 to 8 let you drill up and down to view the data. The data cube table shows a detailed tracking list based on selected category combinations across time.

For details on filters 1–9, see the [Filters section](#) above.

Category 1 to 8: Select up to eight dimensions to add to the data cube for analysis. Use these selections to drill up and down the data across various categories.

Data Cube – Table: Provides a detailed tracking list for vendor billing information based on the selected combination of category values across time.

Fraud Report – Members with Negative Balances

This dashboard provides a detailed tracking list of potential fraud cases based on predefined rules. It highlights the account balance and account status of members who have had negative balances.

Functionality

Use this dashboard to track members and accounts with potential fraud issues.

Minimum Days Down: Select a range for the minimum number of days a member's account has had a negative balance.

Table

Shows a detailed list of accounts with account balance and status for members who have had negative balances. Accounts that went negative but have since returned to a positive balance and remained positive will not appear in this list.

Membership Tiers

This dashboard provides both summary and detail views of how members are distributed across tiers at the end of the selected period, with cumulative results.

Functionality

This dashboard highlights the movement of members shifting between tiers during the selected period.

Ending Period Tiers Summary – KPI – Total Members: Shows the total number of members at the end of the selected period.

Ending Period Tiers Summary – Donut Chart: Click a segment to see the breakdown of member tiers and tier status changes at the end of the selected period.

Note: New members who stay in Tier 1 are not included in the % Same for Tier 1 calculation, as they were not registered at the beginning of the period.

Member Tier Migration – Sankey Chart: Provides an intuitive view of the movement of members between tiers during the selected period.

Drill Down by Beginning Tier: Lets you include or exclude the Beginning Tier from the analysis.

Ending Period Tier Detail – Table: Shows detailed metric comparison across time based on combinations of Beginning and Ending Tiers. Darker blue indicates a greater positive value.

Loyalty Members

The Loyalty Members dashboard is a comprehensive tool for analyzing your Loyalty Member customer base. It focuses on member and household behavior, and purchasing and redemption habits. It also lets you view predefined member segments, create custom segments based on criteria, compare different segments, and analyze behavior across segments.

Functionality

Members Overview View

Filters

- **Start Date & End Date (Current Period Date Range):** Select the date range for which the current period KPIs are calculated and summarized.
- **Start Date & End Date (Comparison Period Date Range):** Select the date range for the comparison period. Comparison period KPIs can be used to evaluate changes relative to the current period and display the percentage change for each metric.
- **Date Group:** Select a grouping value — Day, Week, Month, or Year — to modify how dates are grouped across visualizations that display data by time period, such as trends that appear when hovering over metrics.
- **Business Unit:** Select the business unit for which to display KPIs.
- **Channel:** Select the sales channel at which the transaction was made, such as Console, POS, or App.
- **Province/State:** Select the province or state for the transactions.
- **Device Type:** Select the device or terminal type for the transactions, such as Online, POS Terminal, Self-Checkout, or In-Store.
- **Registered as of End Date:** Filter KPIs to show only members who were registered on or before the selected period's end date.
- **Employee:** Filter KPIs to show results for employees or non-employees.
- **Is Referee (Part of referral feature):** Filter to show activity-based KPIs and member stats for members who were referred by an existing program member. This filter is only available if the program uses the referrals capability.
- **Eligible Metrics:** Choose whether to display KPIs based on loyalty-eligible transactions (eligible spend, eligible quantity, and eligible transactions) or standard transaction metrics (loyalty spend, quantity, and transactions).
- **Show Trend:** Enable tooltip subsections for specific KPIs in the Activity Member Stats section. These subsections display day-level trend lines comparing the current period to the same period in the previous year.

Overall Program Member Snapshot section

Shows key overall program member metrics as of the current period's end date.

- **Base:** Total members actively part of the program as of the end date (registered and unregistered ghost accounts).
- **Registered:** Number of registered members as of the end date.
- **Expired:** Number of expired members as of the end date.

- **Closed/Suspended:** Number of closed, deceased, or suspended members as of the end date.
- **Partner Linked:** Number of members linked to a partner as of the end date.
- **Activity Member Penetration:** Percentage of members who completed a transaction (purchase or redemption) within the current period, out of total base members.
- **Redemption Blocked:** Number of members currently restricted from redemption. Redemption Blocked % is the share of Base Active Accounts. Only available if the redemption blocked capability is enabled.

Member Engagement KPIs section

All metrics in this section are based on the selected current period date range.

- **Activity:** Members who completed a purchase or redemption transaction within the current period. Shows YoY change and period change subsections.
- **New:** Members with their first purchase within the current period. Shows YoY and period change.
- **Redeemers:** Members who completed a redemption transaction within the current period. Shows YoY and period change.
- **Re-engaged:** Members who had a transaction within the current period after a gap of X or more months (configured based on business need).
- **Digital Offers Activations:** Members who accepted a digital LTC promotion offer within the current period. Not affected by Business Unit filter.
- **Redeemers Donut Chart and Bar Chart:** This section contains two charts:
 - **Donut Chart:** Shows the percentage of redeemers out of the total active members count within the selected current period date range. The percentage change reflects the absolute difference between the current and comparison period's redeemer percentages.
 - **Bar Chart:** Shows the total number of redeemers distributed by device or terminal type, using the naming convention defined by the business.
- **Registered Members Gauge Chart, Donut Chart, and KPI:** This section contains three components:
 - **Gauge Chart:** Shows the percentage of registered members as of the current period's end date, out of the total base members as of the same date.

- **Donut Chart:** Shows the count and percentage distribution of members who had activity and were registered on or before the selected period's end date. The first percentage represents the share of total activity members. The percentage with an up or down arrow shows the change between the current and comparison periods for activity and registered members.
- **New Registrations:** Shows the number of new registered members within the selected current period date range. The percentage shows the change between the current and comparison periods for new registered member counts.
- **Linked Members Donut Charts and KPI:** This section contains three components:
 - **First Donut Chart:** Shows the percentage of partner-linked members out of the total base members count as of the current period's end date.
 - **Second Donut Chart:** Shows the count and percentage distribution of members who had activity and were linked at the time of activity, compared to unlinked activity members. The first percentage represents the share of total activity members. The percentage with an up or down arrow shows the change between the current and comparison periods for activity and linked members.
 - **New Linked:** Shows the number of new linked members — based on the first link date tracked in the system — within the selected current period date range. The percentage shows the change between the current and comparison periods for new linked member counts.

Additional Members Details View

Activity Member Stats

- **Spend:** Shows the total amount spent within the selected current period date range from loyalty transactions by members. The percentage reflects the difference between the current and comparison period spend amounts. Selecting **Yes** in the Eligible Metrics filter switches all applicable metrics — except Redemption Metrics — to reflect KPIs based on loyalty-eligible transactions, meaning transactions that included loyalty-eligible products.
- **Spend per Member:** Shows the average amount spent per member within the selected current period date range, considering all transactions. The percentage reflects the change between the current and comparison period values.

- **Spend per Transaction:** Shows the average amount spent per transaction within the selected current period date range, considering all transactions. The percentage reflects the change between the current and comparison period values.
- **Transactions per Member:** Shows the average number of transactions per member within the selected current period date range, considering all transactions. The percentage reflects the change between the current and comparison period values.
- **Quantity per Member:** Shows the average number of individual product units purchased per member within the selected current period date range, considering all transactions. The percentage reflects the change between the current and comparison period values.
- **Redemption Spend:** Shows the total reward value won through coupon redemptions for catalogue products within the selected current period date range. The percentage reflects the change between the current and comparison period values.
- **Redemption Spend per Member:** Shows the average reward value won per redemption member within the selected current period date range. A redemption member is a member who has redeemed a coupon to purchase a specific product from the catalogue. The percentage reflects the change between the current and comparison period values.
- **Redemption Spend per Transaction:** Shows the average reward value won per redemption transaction within the selected current period date range. A redemption transaction is a transaction in which a member redeemed a coupon to purchase a specific product from the catalogue. The percentage reflects the change between the current and comparison period values.
- **Redemption Transactions per Member:** Shows the average number of redemption transactions per redemption member within the selected current period date range. The percentage reflects the change between the current and comparison period values.
- **Quantity per Transaction:** Shows the average number of product units per transaction within the selected current period date range, considering all transactions. The percentage reflects the change between the current and comparison period values.

Note: Enabling Eligible Metrics switches all metrics above (except Redemption Metrics) to reflect only transactions with loyalty-eligible products.

Additional Activity Members Info

- **Activity Members by Province/State of Activity:** Shows the distribution of activity members on a map within the selected current period date range. Hover over a region to view the total number of new members within the same date range.

- **Members by Channel and Device:** Shows activity members broken down by channel or device/terminal type. Toggle between the two views as needed. For definitions of channel and device type, see the earlier sections.
- **Redemption Rate:** Shows the redemption rate in a gauge chart — the percentage of redemption transactions out of the total number of transactions within the selected current period date range. The period change percentage reflects the absolute difference between the current and comparison period redemption rates.

Partners section

Provides KPIs for multiple partners, where applicable:

- **Base as of Current Period's End Date:** Shows the total number of Partner 1 linked members, regardless of activity, as of the current period's end date.
- **New Linked (Within Date Range):** Shows the number of new Partner 1 linked members within the selected current period date range.
- **Activity (Within Date Range):** Shows the number of Partner 1 linked members who had activity — a purchase or redemption transaction — within the selected current period date range.
- **Redeemers (Within Date Range):** Shows the number of Partner 1 linked members who completed a redemption transaction within the selected current period date range.

Households section

- **Base Households as of End Date:** Shows the total number of households as of the current period's end date.
- **Activity Households (Within Date Range):** Shows the number of active households with purchase activity within the selected current period date range.

New Members section

- **Registered Before First Purchase (Within Date Range):** Shows the total number of new members — based on first purchase date — who were already registered on or before their first purchase transaction within the selected current period date range.
- **Unregistered Before First Purchase (Within Date Range):** Shows the total number of new members who were unregistered at the time of their first purchase transaction within the selected current period date range.
- **Gauge Chart:** Shows the percentage of new registered members and new unregistered members out of the total number of new members.

Phone Number Metrics section

Note: This section is only available when the Phone Number capability of ESL is in use.

- **Members with Phone Number as of End Date:** Shows the number of registered and unregistered members who have provided their phone number as of the selected current period end date.
- **Members with Phone Number by Source as of End Date:** Shows the number of members who have provided their phone number, broken down by the source from which it was captured, as of the selected current period end date.
- **SMS Subscription by Short Code as of End Date:** Shows the number of registered and unregistered members who have opted in or opted out of SMS subscription short code messages as of the selected current period end date.
- **Phone Number Provided Between Start and End Date:** Shows a daily count of members based on the date they provided their phone number, broken down by source, within the selected date range. For example, 20 members provided their phone number between July 2023 and December 31, 2024 via console. Note: if a member removes and re-provides their phone number, they are recounted based on the new date within the date range.

Referrals metrics section

Note: This section is only available when the Referrals capability of ESL is in use.

The visualization displays the following KPIs:

- **Total Referrers as of End Date:** Shows the number of members who have referred others as of the selected end date.
- **Total Referees as of End Date:** Shows the number of members who have been referred by other members as of the selected end date.
- **New Referrers:** Shows the number of members whose first referral date falls within the selected date range.
- **New Referees:** Shows the number of members who were referred by other members within the selected date range.

Product Details View

This view provides a product category-level breakdown of member purchase and redemption activity.

KPI Summary

- **Activity Members:** Count of active members in the given period.
- **Spend per Member:** Total Loyalty Spend divided by total active members.
- **Quantity per Member:** Total Quantity divided by total active members.
- **Loyalty Spend:** Total loyalty sales in the given period.
- **Quantity:** Total number of items sold.

All charts in this view support click-through filtering — click a category to narrow all visualizations to that category.

- **Purchase Members Chart:** Shows the number of members who made a purchase in each product category during the selected time period, along with each category's percentage share of total purchasing members. Hover over any product category to view a trend chart of members and percentage share across the selected period.
- **Purchase Spend Chart:** Shows the loyalty purchase spend for each product category during the selected time period. Use the highlight drop-down filter at the top to focus on a specific category — this highlights the selected category across all six charts in the Product Details view. Hover over any product category to view a trend chart of loyalty spend and percentage share across the selected period.
- **Purchase Spend & Transactions per Member Chart:** Shows the average spend, transactions, and basket size patterns across each product category during the selected time period. Choose from three metrics:
 - **Spend & Transactions per Member:** Shows the average spend and average number of transactions per member across each product category.
 - **Spend & Quantity per Member:** Shows the average spend and average number of items sold per transaction across each product category.
 - **Quantity per Member:** Shows the average quantity of items sold per member across each product category, helping identify which categories have the highest sales volume.
- **Redemption Members Chart:** Shows the number of unique members who had each product category in a redemption transaction during the selected time period, along with each category's percentage share of total redeemers. The up and down arrows with percentages show the period change between the current and comparison period date ranges. Hover over any product category to view a trend chart of members and percentage share based on the selected period type.

- **Redemption Spend Chart:** Shows the redemption reward value redeemed by members, distributed across product categories during the selected time period. Use the highlight drop-down to highlight a selected category across all six charts in the Product Details view. Hover over any product category to view a trend chart of loyalty spend and percentage share based on the selected period type.
- **Redemption Spend & Transactions per Member Chart:** Shows the average spend, transactions, and basket size patterns for redemptions across each product category during the selected time period. Choose from two metrics:
 - **Spend & Transactions per Member:** Shows the average spend and average number of transactions per member across each product category.
 - **Spend per Transaction:** Shows the average spend per transaction across each product category.

Member Segmentation View

This view displays KPIs for the standard member segments identified in the product. Extended segments may also be available based on business needs — for example, RFM, Cherry Picker, and Recency segments, which may not apply to all businesses.

Choose Your Segment

Filters

- **Month:** Select the months for which to display the charts.
- **Top N Months - Segment:** Select the number of months to display in the charts.
- **Business Unit:** Select the business units for which to display the charts.
- **Channel:** Select the sales channel through which the product was sold, such as Console, POS, or Web POS.
- **Device Type:** Select the device used to sell the product, such as Console, Online, POS Terminal, or Self-Checkout.
- **Employee:** Filter results to show KPIs for employees or non-employees only.

Click one or more segments to combine them as filters and narrow down the KPIs for the selected segment options. Only standard segments are documented here — extended segments may be available depending on the business.

Note: A member is identified as belonging to a segment, and all their transactions are associated with that segment.

- **New/Existing:** A member is classified as new if their first purchase falls within the selected month. All other members are classified as existing.
- **Redeemer:** A member is classified as a redeemer if they had a redemption transaction within the last X months, where X is configured based on the business definition.
- **Registration:** A member is classified as registered if they registered within the selected month.
- **Geographical:** A member is associated with a province if they have shopped there at least once. Provinces are identified by their abbreviated Canadian names.
- **Digital Offers:** A member is classified as digitally active if they accepted a Load to Cart digital offer within the last X months, where X is configured based on the business definition.
- **Partnership:** A member is classified as linked to a partner if they were linked to that partner during the month of consideration.
- **RFM:** An extended segment configured from the extended member feed. Definition and configuration depend on the business.
- **Cherry Picker:** An extended segment configured from the extended member feed. Definition and configuration depend on the business.
- **Recency:** An extended segment configured from the extended member feed. Definition and configuration depend on the business.

The KPIs update to reflect the selected segments.

- **Members / Spend & % of Total:** By default, shows the number of members belonging to the selected segment and their percentage distribution out of total members with activity within the selected month. Switch to Spend to view the total loyalty spend by members in the selected segment.
- **Multiple KPIs Bar Chart:** Shows the following KPIs for the selected segment: Transactions per Member, Spend per Member, Spend per Transaction, Quantity per Member, or Quantity per Transaction.
- **Points / Rewards \$ Issuance - per Member / Spend:** Select from multiple options to analyze either points or rewards dollar value — based on business need — per member or per dollar spend for the selected segments.

Analyze Your Own Segment

This section lets you select a custom subset of members based on criteria and analyze their KPIs.

Filters

- **Start Date & End Date:** Select the date range within which the member subset is selected and KPIs are calculated and summarized.
- **Date Grouping:** Select a grouping value — Day, Week, Month, Quarter, or Year — to control how dates are grouped across visualizations.
- **Top N Date (Max 14):** Select the number of date elements — based on the selected date grouping — to display in the charts.
- **Eligible Metrics:** Filter the member subset and analyze KPIs based on transactions that included an eligible product.
- **Spend \geq and Spend \leq :** Filter the member subset based on a minimum and maximum average spend, along with other selection criteria.
- **Transactions \geq and Transactions \leq :** Filter the member subset based on a minimum and maximum average number of transactions, along with other selection criteria.
- **Quantity \geq and Quantity \leq :** Filter the member subset based on a minimum and maximum average quantity purchased, along with other selection criteria.
- **Business Unit:** Select the business unit for the member subset selection criteria and summarized KPIs.
- **Channel:** Filter member stats by the sales channel through which the transaction was made, such as Console, POS, or Web POS.
- **Province/State:** Filter member stats by the province or state where the transaction was made.
- **Registration as of End Date:** Filter members based on their registration status on or before the selected end date.
- **Device Type:** Filter member stats by device type, such as Console, Online, POS Terminal, or Self-Checkout.
- **Employee:** Filter member stats to show results for employees or non-employees only.

KPI Summary

- **Activity Members:** Count of active members in the given period.
- **Loyalty Spend:** Total loyalty sales in the given period.
- **Spend per Member:** Total Loyalty Spend divided by total active members.
- **Transactions per Member:** Shows the average number of transactions per member within the selected current period date range, considering all transactions. The percentage reflects the change between the current and comparison period values.

- **Spend per Transaction:** Shows the average amount spent per transaction within the selected current period date range, considering all transactions. The percentage reflects the change between the current and comparison period values.
- **Quantity per Member:** Shows the average number of individual product units purchased per member within the selected current period date range, considering all transactions. The percentage reflects the change between the current and comparison period values.
- **Bonus Points per Member:** Shows the bonus points issued per member within the selected date range, based on the applied filters.
- **Total Points per Member:** Shows the total points issued per member within the selected date range, based on the applied filters.
- **Members / Spend & % of Total:** By default, shows the number of members belonging to the selected segment and their percentage distribution out of total members with activity within the selected month. Switch to Spend to view the total loyalty spend by members in the selected segment.
- **Multiple KPIs Bar Chart:** Shows the following KPIs for the selected segment: Transactions per Member, Spend per Member, Spend per Transaction, Quantity per Member, or Quantity per Transaction.
- **Points / Rewards \$ Issuance - per Member / Spend:** Select from multiple options to analyze either points or rewards dollar value — based on business need — per member or per dollar spend for the selected segments.

Member Segments Comparison View

This view lets you compare KPIs for two combinations of multiple selected segments side by side.

- **Choose 1st and 2nd Combination:** Select multiple segments to build two combinations for side-by-side comparison. For example, compare members linked to Partner 1 who are RFM-Gold against members with no partner link who are also RFM-Gold.
- **Members & % of Total:** Compares the two segment combinations by members or spend associated with members who satisfy each combination. Use the slider to toggle between Members and Spend, and between absolute numbers and percentage share of total.
- **Average KPIs Line Chart:** Compares trends between the two segment combinations for any of the following metrics: Transactions per Member, Spend per Member, Spend per Transaction, Quantity per Member, or Quantity per Transaction.
- **Points Issuance – per Member:** Compares the points issued per member across time for each segment combination. Toggle between Total Points and Benefits Points as needed.

Members Data Cube View

This view lets you drill up and down into KPIs using a combination of available dimensions.

Data Cube

Provides member data at the channel, device type, and province/state level. Slice and dice member data across up to three dimensions — channel, device type, and province/state — and analyze KPIs by different period types, such as day, week, month, quarter, or year. The following filters are available in this view:

- **Metrics:** Filter the data cube to show all metrics or a selected subset.
- **Eligible Metrics:** Works as described in the earlier sections of the dashboard.
- **Registration as of End Date:** Filter to show data for registered members, unregistered members, or both.
- **Business Unit:** Select the business unit for which to display data.
- **Channel:** Filter data by selected sales channels.
- **Device Type:** Filter data by selected device types.
- **Employee:** Filter data by employee status.

Available metrics in the Data Cube

The metrics in the Data Cube view are defined in the previous dashboard views.

Metric
Activity Members
New and Registered Members
Redemption Members %
Activity & Registered % of Active
Spend per Member
Spend per Transactions

Metric
Quantity per Member
Redemption Spend per Member
Redemption Transactions per Member
Loyalty Spend
New Members
New and Unregistered Members
Re-engaged Members
Partner 1 Linked – Activity Members
Partner 1 Linked – Spend per Member
Transactions per Member
Redemption Spend
Redemption Spend per Transactions
Redemption Rate
Total Tender Reward Value

Navigation Bar

Use the navigation bar to move between the following views of the Loyalty Member Dashboard:

1. Membership Overview
2. Additional Activity Members
3. Product Detailed View

4. Members Segmentation
 5. Member Segments Comparison
 6. Members Data Cube
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Point Bank

The Point Bank dashboard is a centralized tool for analyzing loyalty points and rewards in detail. It reports on the point types applicable to the business and breaks them down into subtypes as needed. Use this dashboard to monitor program costs across each sub-program and initiative, and to analyze earned and redeemed points or rewards by channel, terminal, product category, redemption type, and redeemed catalog products where applicable. Points and rewards terminology varies by business.

Summary

The Summary page shows different categories — such as Base, Bonus, Discretionary (for example, call center, goodwill rewards), Redeemed, Expired, and Transferred — and further breaks them down into types and sub-types for a selected period.

Filters

- **Date Range:** Select the time period of transactions for which to summarize points.
- **Date Grouping:** Select a date grouping from the available options.
- **Date Elements:** Select specific days, weeks, months, or other periods based on the date grouping selected in the previous filter.
- **Select Metric:** Select either Points or Rewards \$ as the metric to display on the Summary page.
- **Business Unit:** Select a business unit applicable to the business.
- **Site Group:** Select from the available site groups.

Point categories

- **Base Points:** Non-bonus points earned by members as part of the loyalty program.
- **Bonus Points:** Points awarded from promotional offers, activity, gameplay points (ad hoc rewards), referrals, partner promotions, partner linked purchases, and similar sources.
- **Discretionary Points:** Points awarded by the call center, as goodwill gestures, or through similar means during the selected time period.
- **Redeemed Points:** Points redeemed by members during the selected time period.

- **Expired Points:** Points that expired and can no longer be used for purchases or redemptions during the selected time period.
- **Transferred Points:** Points transferred out during the selected time period.

Points Category chart

A bar chart showing total points for each point category (Base, Bonus, Discretionary, and Redeem). Click a category to view a breakdown by type in a pie chart on the right.

Point Type and Sub-Type Details

Shows a detailed breakdown of the selected category by configured point types (for example, Activity, Partner Promo). Clicking a Point Type shows the corresponding Point Sub-Type in an additional pie chart.

Data Cube (Summary page)

The Data Cube lets you slice and dice data across four dimensions: Point Type, Point Sub-type, Category, and Site Group. The following metrics are available. Note that additional point types may be added based on business needs — the list below reflects the standard available types:

1. Base Points/Reward \$
2. Bonus Points/Reward \$
3. Discretionary Points/Reward \$
4. Expiry Points/Reward \$
5. Redeem Points/Reward \$
6. Transfer Points/Reward \$ – In
7. Transfer Points/Reward \$ – Out

Clicking a metric in the Data Cube displays a trend chart at the bottom of the cube for that specific points or rewards dollar metric. Use this chart to analyze the overall behavior of those points during the selected time period.

Purchase Details

The Purchase Details page shows Base and Bonus Points earned during purchases across multiple attributes, including Site Type, Terminal Type, Channel (such as Store or Online), and the products on which points were earned.

Filters

- **Date Range:** See Date Range in the [Common Filters](#) section.
- **Date Group:** See Date Group in the [Common Filters](#) section.
- **Date Elements:** See Date Elements in the [Common Filters](#) section.
- **Business Unit:** See Business Unit in the [Common Filters](#) section.
- **Point/Reward \$:** See Select Metric in the [Common Filters](#) section.
- **Site Type:** Select the site type where the transactions were made.
- **Store/Online:** Filter by whether the transaction was made in a physical store or through an online portal.
- **Terminal Type:** Select the point of payment type, such as Self-Checkout, POS terminal, or online payment.
- **Type:** Select from the available product categories within the scope of the business.

Charts

The following charts are clickable drill-down charts. Clicking a value in one chart narrows results across all other charts and the data cube.

- **Bonus Points/Reward (\$) by Store & Online:** This bar chart shows the share of purchase points or rewards dollars by channel — for example, Store and Online — including the actual values and percentage share for each channel during the selected time period. Use the drop-down to switch between Bonus Points, Base Points, or Total Points (Base + Bonus).
- **Bonus Points/Reward (\$) by Terminal Type:** This pie chart shows the share of purchase points or rewards dollars across each terminal type during the selected time period — for example, Online, Self-Checkout, or POS Terminal. Use the drop-down to switch between point types as described above.
- **Bonus Points/Reward (\$) by Type:** This bar chart shows the purchase points or rewards dollars earned across each product category. The darker the color and the longer the bar, the greater the points or rewards dollar value. Use this chart to identify which product categories are most popular and generating the highest points. Use the drop-down to switch between point types as described above.
- **Data Cube – Purchase Details Page:** The Data Cube lets you slice and dice data across four dimensions: Site Type, Store/Online, Terminal Type, and Type. The following metrics are available:
 - Points/Reward \$
 - Bonus Points/Reward \$
 - Total Points/Reward \$

Note: Clicking a metric displays a vertical bar chart at the bottom of the cube for that specific points or rewards dollar metric. Use this chart to analyze the overall behavior of those points during the selected time period.

Redemption Details

The Redemption Details page provides information on redeemed points across attributes including Site Type, Terminal Type, and Channel. It also shows results by redemption type and specific redeemable products, where applicable.

Filters

- **Date Range:** See Date Range in the [Common Filters](#) section.
- **Date Group:** See Date Group in the [Common Filters](#) section.
- **Date Elements:** See Date Elements in the [Common Filters](#) section.
- **Business Unit:** See Business Unit in the [Common Filters](#) section.
- **Point/Reward \$:** See Select Metric in the [Common Filters](#) section.
- **Site Type:** Select the site type where the transactions were made.
- **Store/Online:** Filter by whether the transaction was made in a physical store or through an online portal.
- **Terminal Type:** Select the point of payment type, such as Self-Checkout, POS terminal, or online payment.
- **Type:** Select from the available product categories within the scope of the business.

Note: The following three charts support click-through drill-down. Clicking a value in any of these charts filters the other charts to show only relevant information for that selection.

Redemption Points/Reward (\$) by Store & Online: This bar chart shows the share of redeemed points or rewards dollars by channel — for example, Store and Online — including the actual values and percentage share for each channel during the selected time period. Use this chart to identify where redemption transactions are occurring.

Redemption Points/Reward (\$) by Terminal Type: This pie chart shows the share of redeemed points or rewards dollars across each terminal type during the selected time period — for example, Online, Self-Checkout, or POS Terminal. Available values depend on the business.

Redemption Points/Reward (\$) by Type: This bar chart shows the redeemed points or rewards dollars across multiple redemption types or specific products eligible for redemption, based on

business applicability. The darker the color and the longer the bar, the greater the points or rewards dollar value.

Data Cube – Redemption Details Page: The Data Cube lets you slice and dice redemption points or rewards dollars across four dimensions: Site Type, Store/Online, Terminal Type, and Type. Clicking a value displays a vertical bar chart at the bottom of the cube for the selected redemption points or rewards dollar metric. Use this chart to analyze the overall behavior of those points during the selected time period.

Points Lifecycle

The Points Lifecycle dashboard uses FIFO (First In, First Out) tracking to manage loyalty points, meaning the oldest points earned by a member are used before newer ones. FIFO tracking helps businesses manage the financial liability associated with points — since points represent a future obligation, this method allows businesses to more accurately predict and control when those liabilities are settled.

The dashboard is organized into the following sections:

Points Lifecycle Summary

- Summary of Points – KPIs
- Waterfall of Average Points
- Average Points Activity by Range of Reporting Period

Points Lifecycle Details

- Data Table
- Trend 1 – Across Reporting Periods
- Trend 2 – Across Period Labels (from selected Earned Periods)

Points Lifecycle Summary

Summary of Points – KPIs

This section reports earned points for a selected earned period and tracks the various types of burn activities associated with those points. Select an Earned Period and a Reporting Period to track consumption. By default, KPIs show the latest burn period information for the selected earned period.

Note: Reporting Period is based on business fiscal or normal calendar. It is tied to the date of the burn transaction that consumed points from a particular earned period using FIFO. Only fully complete reporting periods are included.

Each KPI card displays the following information for each type of burn activity — such as Redeemed, Transfer, Expired, or Adjusted:

- **Redeemed Points:** Shows the redeemed points for the selected earned period as of the latest reporting period, which is the default when the dashboard loads. Click the card to view redeemed points for any reporting period using the Select Reporting Period filter.
- **% Increase or Decrease vs. Average of nth Period:** A benchmark comparison of redeemed points in the selected reporting period against the overall average for the nth reporting period across all earned periods. For example, for earned period 2022 P10, if 2025 P03 is the 30th period — with 2022 P10 as period 1, 2022 P11 as period 2, and so on — the benchmark is the average redeemed points for the 30th period across all earned periods that have at least 30 periods to date. This average is then compared to the redeemed points in 2025 P03 to calculate the percentage change.
- **Average Redeemed Points per Period across N Periods:** Shows the average points redeemed per period for the selected earned period, based on the nth period determined by the reporting period selection.
- **Trend Graph:** Shows the percentage rate of the redeemed points metric as a running sum across reporting periods for the selected earned period.

Waterfall of Avg. Points

This graph tracks Burned, Redeemed, and Unused points across reporting periods. The leftmost value — Avg. Points Issued — shows the average points earned across all earned periods. The waterfall chart on the right tracks the selected metric (Unused, Burned, or Redeemed) across the progression of reporting periods.

Filters

- **Range of Reporting Periods:** The waterfall chart tracks the average of the selected metric across all earned periods, from reporting period 1 to n, based on the selected range. Each reporting period is labeled sequentially from 1 to n across each earned period. The following range options are available:
 - **At Most 12 Periods:** Reporting periods ranging from 1 to 12.
 - **At Most 24 Periods:** Reporting periods ranging from 1 to 24.

- **At Most 36 Periods:** Reporting periods ranging from 1 to 36.
- **All:** All reporting periods, regardless of their period label range.
- **Waterfall Metric:** Select the metric to display in the waterfall chart across the series of period labels (1 to n).

Average Points Activity by Range of Reporting Period

This section shows the different categories of average points for the selected earned year across a range of reporting periods. Averages are calculated from all earned periods in the selected year that had at least n reporting periods, where n is determined by the selected range of reporting periods. Use this section to forecast average burned and unused points for different period ranges — for example, the percentage of points redeemed within 3, 6, or 9 periods.

Select the earned period year and the desired range of reporting periods using the following options:

- **3 Periods:** Earned periods with at least 3 reporting periods.
- **6 Periods:** Earned periods with at least 6 reporting periods.
- **9 Periods:** Earned periods with at least 9 reporting periods.
- **12 Periods:** Earned periods with at least 12 reporting periods.

Use the Summer and Winter period filters to further narrow down the results. The table shows the selected year, the total number of earned periods based on the selected range, and a series of average points metrics by category. Click a metric in the table to update the bar chart, which displays a combined view of different period ranges for the selected year. Note that this section does not display data for ranges where no earned periods have at least the selected number of reporting periods.

Points FIFO Details

Details Table

Shows various point categories and calculated metrics across every earned period and its corresponding reporting periods. Click any metric to switch the trend graphs below the table.

Table filters

- **Year of Earned Period:** Select the year of the earned period.
- **Earned Period:** Select one or more earned periods available in the report.

- **Reporting Period:** Select one or more reporting periods available across earned periods in the report.
- **Period Label:** Select the sequence of a reporting period within its earned period.
- **Winter/Summer Periods:** Filter results by Winter or Summer periods.
- **Reporting/Burn Period Start Date:** Select a start date range for the reporting or burn period.
- **Reporting/Burn Period End Date:** Select an end date range for the reporting or burn period.
- **Business Unit Calendar:** If the business has multiple business units, select the appropriate calendar for reporting based on the business unit.

Table metrics

- **Points Earned:** All types of points issued in the earned period.
- **Points Burned:** Total points burned in the reporting period, including all applicable burn types such as Redeemed, Expired, Adjusted, Transferred, Household Redeemed, Balance Update, and Other Burn.
- **Points Burned (%):** Percentage of points burned in each reporting period relative to total points earned in the earned period.
- **Running Burned to Earned Rate:** A running sum of burned points across reporting periods relative to earned points.
- **Points Adjusted:** Total points adjusted in the reporting period, including adjustments to Base, Bonus, Discretionary, and other point types.
- **Points Adjusted (%):** Percentage of points adjusted in the reporting period relative to total earned points.
- **Running Adjusted to Earned Rate:** A running sum of adjusted points across reporting periods relative to earned points.
- **Points Transferred Out:** Total points transferred out by the member in the reporting period. This excludes transfers made using the Ad Hoc Redeem action.
- **Points Transfer (%):** Percentage of points transferred out relative to total earned points.
- **Running Transfer to Earned Rate:** A running sum of transferred points across reporting periods relative to earned points.
- **Points Redeemed:** Total points redeemed through member-initiated redemptions in the reporting period.
- **Points Redeemed (%):** Percentage of points redeemed relative to total earned points.
- **Running Redeemed to Earned Rate:** A running sum of redeemed points across reporting periods relative to earned points.

- **Points Household Redeemed:** Total points redeemed from the household through member-initiated redemptions in the reporting period.
- **Points Household Redeemed (%):** Percentage of household redeemed points relative to total earned points.
- **Running Household Redeemed to Earned Rate:** A running sum of household redeemed points across reporting periods relative to earned points.
- **Points Expired:** Total points expired in the reporting period.
- **Points Expired (%):** Percentage of points expired relative to total earned points.
- **Running Expired to Earned Rate:** A running sum of expired points across reporting periods relative to earned points.
- **Points Unused:** Total points remaining after each reporting period, calculated as points earned minus points burned.
- **Points Unused (%):** Percentage of points remaining after each reporting period relative to total earned points.
- **Points Other Burn:** All other burn point categories not covered above, including Ad Hoc Redeem points.

Forecasting metrics

- **Points Out/Points Unused Prev:** Shows the percentage of total points burned in the next reporting period relative to the previous reporting period.
- **Speed of Points Out (Running Average of 3 Periods):** Shows the speed at which points are burned, based on the moving 3-period average of Points Out/Points Unused Previous. This metric requires at least 3 periods and cannot be calculated for the first 3 periods.
- **Points Redeemed/Points Unused Prev:** Shows the percentage of points redeemed in the next reporting period relative to the previous reporting period.
- **Speed of Points Redeemed (Running Average of 3 Periods):** Shows the speed at which points are redeemed, based on the moving 3-period average of Points Out/Points Unused Previous. This metric requires at least 3 periods and cannot be calculated for the first 3 periods.

Trend 1 – Across Reporting Periods

Clicking a metric in the table displays a trend graph showing that metric across all reporting periods within the selected earned period. For example, clicking Points Burned for earned period 2022 P10 displays a trend line covering reporting periods from 2022 P10 to 2025 P03 within that earned period.

Trend 2 – Across Period Labels

Clicking a percentage metric in the table displays a trend graph showing that metric across reporting periods, with period labels on the x-axis representing the sequence of reporting periods. Use this graph to compare percentage metrics across multiple earned periods using the earned period filter — for example, to compare burn rates and determine whether they are aggressive or passive. For example, clicking the % Redeemed to Earned ratio and selecting earned periods 2022 P10, 2022 P11, 2023 P10, 2023 P11, 2024 P10, and 2024 P11 displays the trend of that ratio across all selected earned periods, with period labels ranging from 1 to 28.

Tier Rollover

The Tier Rollover dashboard tracks how members move between benefit tiers across benefit periods. It summarizes total members, retention, downgrades, and upgrades, broken out by destination tier. Use this dashboard to filter by benefit period start date, review detailed period-by-period metrics, and explore historical trends. Interactive tables and charts highlight retention patterns, tier migration, and overall program health over time.

Annotations and Footnotes

Hover over the info icon in the top-left of the dashboard for definitions and usage tips. The following key definitions apply throughout the dashboard:

- **Members Retained:** Members whose ending tier in the current period equals their ending tier in the prior period.
- **Members Downgraded:** Members whose ending tier in the current period is lower than their ending tier in the prior period.
- **Members Upgraded:** Members who moved to a higher tier within the same period relative to their tier at period start. This is an in-period movement measure.
- **Tier 0:** Represents the lowest tier.

Percentage calculations work as follows:

- Headline percentages for Retained, Downgraded, and Upgraded use Total Members as the denominator.
- Percentages within a tile's breakdown — for example, Rollover Retain Tier 2 — use the tile's own total as the denominator and will sum to approximately 100%, with minor rounding differences.

Note: Retained + Downgraded + Upgraded will not necessarily equal Total Members. This is expected because Upgraded is an in-period movement metric — a member can be retained or downgraded relative to the prior period and may also have been upgraded at some point during the current period.

Summary Section

The top section provides an at-a-glance view of member tier movement for the selected benefit period and shows distribution by destination tier.

Filters

- **Benefit Period Start Date:** Select the benefit period start date to filter the dashboard.

Cards & Metrics

- **Total Members:** Shows the distinct number of members evaluated in the selected period.
- **Members Retained:** Shows the count and share of total members whose tier matched the prior period. The breakdown shows the retained tier.
- **Members Downgraded:** Shows the count and share of total members whose tier decreased relative to the prior period. The breakdown shows the destination tier.
- **Members Upgraded:** Shows the count and share of total members who moved to a higher tier at any point during the current period. The breakdown shows the highest tier reached.

Details for All Periods section

Lists detailed figures for each benefit period, letting you compare movement across all visible periods. Clicking a metric cell updates the Trend Explorer to display the time series for that metric. Clear the selection to reset.

Table columns

- **Benefit Period Start Date:** First date of the period represented by the row.
- **Benefit Period End Date:** Last date of the period represented by the row.
- **Total Members:** Distinct count of members in scope for that period.
- **New to Tiers:** Members newly introduced to the tier program in that period.
- **Members Retained and % Members Retained:** Count and share of members who kept their prior period tier.
- **Rollover Retain Tier 3, 2, 1, 0:** Distribution of retained members by retained tier.

- **Members Downgraded and % Members Downgraded:** Count and share of members ending in a lower tier than the prior period.
- **Downgrade to Tier 2, 1, 0:** Distribution of downgraded members by destination tier.
- **Members Upgraded and % Members Upgraded:** Count and share of members who moved up within the period.
- **Upgrade to Tier 3, 2, 1, 0:** Distribution of upgraded members by highest tier reached.

Trend Explorer section

Visualizes the time series for a metric selected in the Details table, enabling quick trend assessment across benefit period dates.

Functionality

- Click a metric cell in the Details table to update the corresponding trend chart. The y-axis and data points reflect the selected metric, and the x-axis shows the benefit period dates.
- Hover over any point in the trend chart to view exact values and dates.
- To switch to a different metric or row, click another cell — the chart updates instantly.
- To reset the trend view, clear the table selection.

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(Simulated during dev for better perf)