Merchant Access Portal Reports
August 2009

Introduction

ProfitPoint's Merchant Access Portal (MAP) can be a powerful tool for managing your gift and/or loyalty program. The reports available to you can help you account for your program, monitor the success of the program generally and for specific locations and groups, find ways to improve your sales opportunities, identify customers for marketing, and even protect yourself against fraudulent use of the program. This article will focus on how the MAP reports can be used to accomplish these tasks.

Additionally, we are continually developing the MAP, and expect to make it even more helpful to you as a merchant by adding additional reports and new features and integrations. Our goal is for the MAP to become your one-stop location for everything related to your gift & loyalty needs. Our most recent added feature is an integration with iContact, a mass-email marketing tool. Expect more new features to come!

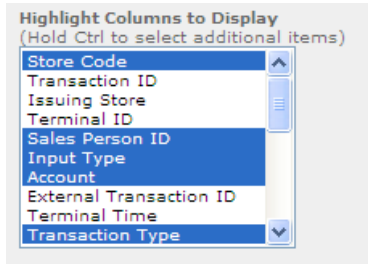
Selecting Data, Options and Navigation

The reports are designed to have the flexibility needed for all of our different customers. We also tried to make them as easy to use as possible. However, sometimes those two goals conflict a little, so this section is aimed to help you understand how to actually navigate and use the report interface.

When you log into the MAP, you will see only those elements to which you have been granted access. There is a section for reports, user management, profile management, billing, additional services and help. There is also an overview of your program on this first page. This home page uses "portals" (boxes on the page) and tabs to display these sections. The default, "My Navigation Pane" lists all reports to which you may have been granted access, and a portal for managing users if you have that access. The "My Information" tab shows your login, name and Personal Preferences and is where you can change your email and password. Lastly under "Help," there are many useful tips and links to further assist you, as well as the phone number to our technical support department.

When you select a report, you will first be sent to a page of options for the report. On this page, you will need to select a data set, either by manually selecting one or more store locations, or by using a saved "View Set." For most reports, you will also need to select a date or a date range. You may do this by clicking on the name of a predefined date, such as "yesterday," "last month" or "current month to date," or you may select dates manually by typing in dates in "m/d/y" format or by clicking on the calendar icons ( ) and selecting a date there. Many reports also have advanced option, such as the ability to select what fields to display in your report as columns (Figure 1.1); account, issuing store, transaction type, ending gift balance, etc. or fields to total; net gift value, net points, number of transactions, etc.

Figure 1.1



For example, our standard Transaction Activity report (available to everyone by default), has over 20 column headers to choose from, 7 columns to total (Figure 1.2) and 4 columns for subtotals. The columns to total will show the total amount of each column selected; total number of transactions, total gift value, etc. The subtotaling options (Figure 1.3) include store code, transaction type, terminal id or salesperson.

Figure 1.2

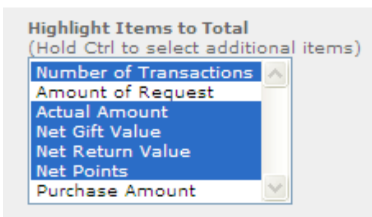
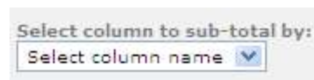


Figure 1.3



Once you click "Get Report," you will be sent to the page with the report described by the options you selected. Please be aware that if your report has many thousands of rows, it may take a little longer to display.

Within the report itself, you may see many links. There are two different kinds of links: "drill down" links and "sorting" links. Drill down links will send you to other reports related to the item you clicked. For example, in an overview report each store is a link in which will take you to a detailed report of that particular store. Other links such as the account number will take you to an Account Profile page for that particular card where you can see demographics and past transaction history. "Sorting" links are when column headers in a report are links; you can click them to sort the report by that column. Click a second time to reverse the sort order.

All reports are also able to be downloaded as CSV files. CSV stands for Comma Separated Values. It is a standard text format used for transferring data between systems. CSV files can be imported into nearly any spreadsheet or database program. If you have Microsoft Excel installed on your system, when you download these files, your computer will offer to open them in Excel. Be careful of this, as Excel has a limit of 15 digits when handling numbers. If your card numbers are 16 digits or longer, Excel will change the 16th digit and on to zeros. If you need to preserve the card numbers, please follow the instructions on the CSV download page.

Each page throughout the portal has a navigation menu to go to another report, back to the navigation pane or help.

Reports Overview

This table lists all of our currently available reports. The reports included in our “Standard” package are available to everyone, and will be discussed in greater detail in the next section.

Report	Description	Report Package
Transaction Activity	This report is a simple list of transactions that have occurred that meet the criteria selected.	Standard
Outstanding Balance/Liability	This report shows the balance on all active cards as of a selected date.	Standard
Gift Activity Summary	This report shows gift activity summarized by transaction type.	Standard
Loyalty Activity Summary	This report shows loyalty activity summarized by transaction type.	Standard
Activity Summary	This report breaks down transactions by type.	Standard
Customer Demographics	This report shows all account demographics.	Standard
Card Expiration	This report shows cards expiring upon selected date(s)	Standard
Gift Activity Overview	This report provides an overview of the gift card activity at multiple locations.	Premium
Fraud/Error Report	This report allows a user to select a number of criteria to find transactions that could indicate fraud, errors or other abuses of their program.	Premium
Loyalty Activity Overview	This report provides an overview of the reward card activity at multiple locations.	Premium
Customer's Last Visit	NEW! This report shows the date and time of the last transaction of a card holder in your store or program.	Premium
Transaction Volume Summary	Breaks down the transactions by type for a selected data set.	Premium
Dormancy Report	This report shows the cards with balances and last update that have not been used since a selected date.	Premium
Auto-Reward Issuances	This report details the rewards granted to card holders by reaching automatic point redemption thresholds.	Premium
Activity Overview	Summary of Gift and Loyalty activity of ALL locations	Premium
By Purchase Volume	NEW! Segment your loyalty customers by filtering on number of purchases and/or purchase volume over a period.	Premium
Customer Demographics - Advanced	A version of the standard Customer Demographics report that includes the ability to report on Custom Questions	Custom Questions
Transaction Activity - Advanced	A version of the standard Transaction Activity report that includes the ability to report on Custom Questions	Custom Questions
Interlocation Settlement Overview (card-based)	This settlement report assumes all balance on the card is owned by the first store to process the card.	Card-based Settlement

Interlocation Settlement - Location Detail	This report is a detail report for a location that is part of a card-based interlocation settlement.	Card-based Settlement
Interlocation Settlement Overview (value-based)	This settlement report assumes all balances on the card are owned by the stores that issued the balance	Value-based Settlement
Location Liability	This report shows the outstanding liability for a single location which is participating in a value-based interlocation settlement program.	Value-based Settlement

Standard Reports

Transaction Activity

The Transaction Activity report displays information on the successful transactions processed as part of your ProfitPoint gift and/or loyalty programs. Almost any data collected or calculated as part of the transaction is available in this report, but the most commonly used information is selected for you by default.

By using the various options to subtotal and total the report, you can answer basic questions about your program, such as "how many gift cards did I sell in the past two weeks, and for how much?" To answer this specific question, you would select the appropriate date range and then have the report subtotal by Transaction Type. Your report would then include subtotals for each type and would additionally display a table similar to Figure 1.4, giving you the answer that you issued 20 gift cards for a total of $1719.99.

Figure 1.4

Trans Type	No. of Transactions	Actual Points	Gift Balance
Issuances	20	0	$1,719.99
Loy Redemptions	5	-295.54	$0.00
Point Accum	196	9379.07	$5,100.00
Inquiries	9	0	$0.00
Redemptions	106	0	($6,315.59)

The Transaction Activity report is also the best report from which to download data if you plan to create your own reports.

Outstanding Balance/Liability

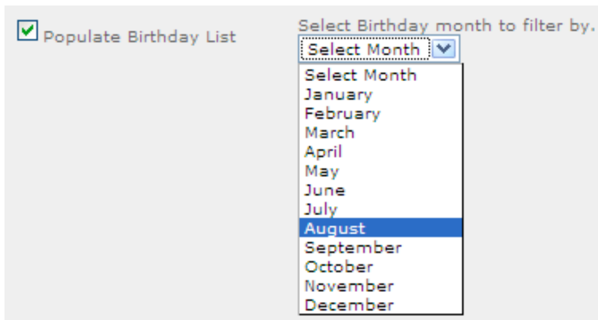
The Outstanding Balance/Liability report is used to display all of the active cards for your program which hold balances and the totals of those balances. It does not include cancelled or expired cards. Neither does it include cards with zero balances.

This report, along with the Transaction Activity report can be used to do basic program reconciliation. The balances at the beginning of the month plus the balances added and subtracted via transaction activity should equal the balances at the end of the month. However, it is important to note that there are options for managing your program that could potentially throw off this reconciliation. Making cards expire, cancelling and reactivating cards, combining and transferring balances, could all, potentially affect this reconciliation. It may help to run a Card Expiration report for the month.

Customer Demographics

The Customer Demographics report shows all accounts and demographics tied to your cards, with options of selecting what columns to view including first name, last name, address, gift balance, etc. This report also gives the option of selecting a birth month of accounts, for example selecting August would show all accounts that have a birthday in August (Figure 1.5).

Figure 1.5



Card Expiration

The Card Expiration report actually runs several different expiration-based reports. You can get a list of all of your cards with an expiration date attached, a list of all cards that are (or will be) expired as of a specific date, a list of cards that expired during a specific period, or a list of cards that are not yet expired, but will be expiring by a selected future date.

Activity Summaries

Currently, we provide two separate activity summary reports, Gift Activity Summary and Loyalty Activity Summary. The activity summary reports break down the transaction activity by transaction type. Because there are many transaction types that apply equally to gift and loyalty, we will soon be replacing these two reports with a unified Activity Summary report. The new report will be basically the same as the other two except that it will include all transaction types.

Getting a MAP account

There are two options to get MAP access. First, you can register from the home page of ProfitPoint at www.rewardforloyalty.com. On the top right portion of the page click on register, and follow the instructions. Second, you can simply dial 1-800-661-0781 ext 103 and our team of technical support representatives will assist you with setting up your MAP access.

Additional Information

You can find additional information about reports and other MAP functions in the MAP User Manual, available here: http://map.profitpointinc.com/docs/user_manual.pdf