

# Loyalty Card Usage Report

## Hints and Tips

- ✓ Use this report to audit operator scan rate of loyalty cards, to identify any improvements. E.g. if there are lower figures on cigarette tills and SCO's. It could be because the operator isn't asking the customer if they have a loyalty card (or it could simply be that those customers didn't have cards!)
- ✓ This report can be run on a BOS or a HOS. If run at a HOS, the data is grouped by Store. However, the operator names will not be accurate because the HOS doesn't have the same operator data that's stored in the BOS.
- ✓ The data reports on prefixed cards used at POS:
  - A prefixed card is one that has been set up in POS Config | Accounts | Customer Card.
  - The report first looks at the System Params CustomerLoyaltyPrefixes for the prefixes to include; separate each with a comma. Surefire Support can assist with this setup.
  - If this system param doesn't exist or is blank, the **Prefixes Selection** Parameter returns (daily.dat) data for defaults 2001, 2001, and 2050.
  - If two prefixed cards are scanned in the same transaction, the **Card Trans.** field will only report [1] instance. For example, a customer may have a Loyalty Card and a Senior Discount card.
  - You cannot filter the report by prefix.
- ✓ The report only provides totals for each operator's transaction activity, there is no loyalty card detail included.

The Loyalty Transactions by Operator report is used to review if an operator has an unusually low or high scanning rate of loyalty cards; the report shows the number and percentage of card transactions compared to the total number of transactions at POS.

1. From the BOS **Reports** menu, select **Security**, then **Loyalty Transactions by Operator** report.
2. Select the required parameters:
 

Parameter	Value	Result
<b>End Date</b>	The end date you wish to review till (inclusive); select a date option or type a date as dd/mm/yyyy.	
<b>Start Date</b>	The start date you wish to review from; select a date option or type a date as dd/mm/yyyy.	
<b>Store Number</b>	Blank	Data returns for by store for all stores (if reporting from the HOS), or the store linked to the BOS.
	A Store Number	Will only return data for this store.
3. Click **OK**.
 

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Selection Parameters:			Report Date:	Time:
Start Date:	19/07/2021 12:00:00AM	End Date:	19/07/2021 12:00:00AM	Prefixes: 2001,2002,2050
Operator No.	Name	Card Trans	Number of Trans	% Usage
Store: 3991 Ritches TCC Testing				
11	Jerry Lewis	1	1	100.00%
12	Dean Martin	0	1	0.00%
9,819	Surefire Support Surefire Support	2	7	28.00%
<b>Totals</b>		<b>3</b>	<b>9</b>	<b>42.67%</b>