**Phase 7: Reports & Dashboards**

**1. Objective**

The goal of this phase was to provide **business visibility** into the Loyalty Program by creating **Reports and Dashboards**.  
These reports give Support Managers and Administrators insight into:

* Loyalty Member growth and distribution.
* How orders are driving loyalty point accumulation.
* Reward redemption activities.
* Customer inactivity and re-engagement campaigns.
* Overall performance of the loyalty program.

This aligns with the project’s business requirement of ensuring managers can **track KPIs (Key Performance Indicators)** without technical intervention.

**2. Reports**

All reports were created and stored in the **Public Reports** folder for easy access by managers.

**2.1 Loyalty Members by Tier Report**

* **Type:** Summary Report
* **Object:** Loyalty Member (Loyalty\_Member\_\_c)
* **Group By:** Loyalty\_Tier\_\_c
* **Fields Displayed:** Loyalty Member Name, Contact, Current Balance
* **Purpose:** Shows distribution of customers across Silver, Gold, Platinum tiers.
* **Business Value:** Quickly identify how many customers are in each tier.

**2.2 Orders Driving Loyalty Points Report**

* **Type:** Tabular Report
* **Object:** Orders (Order)
* **Filters:** Status = "Activated"
* **Fields Displayed:** Order Number, Customer (Contact), Total Amount, Points Earned
* **Purpose:** List all activated orders contributing to loyalty points.
* **Business Value:** Ensures managers know which orders are generating loyalty benefits.

**2.3 Loyalty Points Balance by Member Report**

* **Type:** Summary Report
* **Object:** Loyalty Member (Loyalty\_Member\_\_c)
* **Group By:** Contact (Customer)
* **Fields Displayed:** Member Name, Contact, Loyalty Points Balance
* **Purpose:** Shows point balances for each member.
* **Business Value:** Identify high-value customers with large point balances.

**2.4 Reward Redemptions by Status Report**

* **Type:** Summary Report
* **Object:** Reward Redemption (Reward\_Redemption\_\_c)
* **Group By:** Status\_\_c
* **Fields Displayed:** Reward Name, Amount, Requested Date, Contact
* **Purpose:** Track redemptions by Submitted, Approved, and Rejected.
* **Business Value:** Helps in monitoring the approval process and detecting bottlenecks.

**2.5 Inactive Customers Reengaged Report**

* **Type:** Summary Report
* **Object:** Contact
* **Filters:** Reengagement\_Email\_Sent\_\_c = True
* **Fields Displayed:** Contact Name, Email, Last Order Date, Reengagement Sent
* **Purpose:** Show inactive customers targeted for reengagement.
* **Business Value:** Validate whether campaigns are targeting the right customers.

**3. Dashboards**

Dashboards were created in the **Private Dashboards** folder and shared with **Support Manager** users.

**3.1 Loyalty Program Dashboard**

This dashboard consolidates all reports into **visual components**.

* **Component 1: Loyalty Members by Tier (Pie Chart)**
  + Visualizes distribution across Silver, Gold, and Platinum.
* **Component 2: Orders Driving Loyalty Points (Bar Chart)**
  + Displays top orders contributing to loyalty points.
* **Component 3: Loyalty Points Balance by Member (Table)**
  + Shows top customers and their balances.
* **Component 4: Reward Redemption by Status (Funnel Chart)**
  + Provides redemption process flow (Submitted → Approved → Rejected).
* **Component 5: Inactive Customers Reengaged (Bar Chart)**
  + Tracks number of inactive customers contacted for re-engagement.

**4. Linking to Support Agent Console**

* The **Loyalty Program Dashboard** was added to the **Support Agent Console App**.
* The **Reports tab** was added to the navigation bar for Support Managers.
* Agents and managers can now:
  + View reports directly in the console.
  + Open dashboards to analyze customer trends.
  + Use analytics during case handling.

**5. Business Benefits**

* **Visibility:** Managers gain a 360° view of loyalty program performance.
* **Efficiency:** Easy monitoring of orders, loyalty points, and redemption activities.
* **Actionable Insights:** Quickly identify inactive customers, approve redemptions, and monitor high-value customers.
* **Data-Driven Decisions:** Encourages proactive engagement with customers to drive retention.