

April 17, 2017 - Improved Rider Rewards Chronological Report

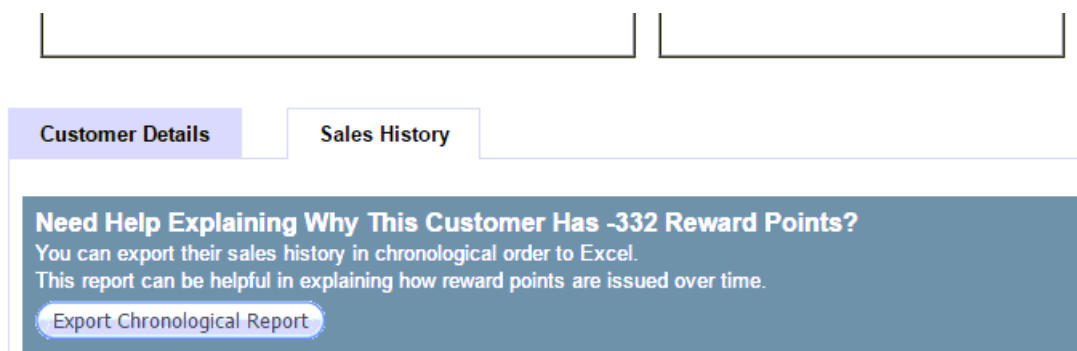
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Simpler Is Better

Bottom-line: If your dealership uses **multiple reward groups**, we are improving the Chronological Report so it's easier to read! If you want to quickly see exactly what we changed, [click here and jump to the end](#). Otherwise, if you want to read the details leading up to the change, continue reading.

About The Chronological Report

While available reward point balances are and always have been 100% accurate, customers often want detailed explanations of how their balances were created. The "Chronological Report" was intended to provide answers to those questions. It provides a detailed breakdown of a customer's point balance from their very first sale to their most recent sale.



The Chronological Report is located on the Sales History page.

What's Changing With This Report?

NOTHING IS CHANGING WITH YOUR CUSTOMER DATA. However, we have updated the Chronological Report (shown above) so that dealers who have multiple reward groups can read the results easier.

This Only Affects Dealers Who Use Reward Groups

Previously, this report would display the "Reward Group Multiplier" as the customer's current reward group that they are in "today." It did not show what reward group the customer was part of during the time of a particular transaction.

Presenting data this way has created confusion because the current reward group would appear on every historical transaction. The viewer would unintentionally think the group multiplier applied to "that day." Also, the report would reconcile line item entries when customers changed groups to show exactly how many points they

had before and after the group change.

While this method provided 100% accurate numbers, it created questions for those who do not fully understand how the system calculates historical reward points.

A type of "year-end" reconciliation occurs every time someone changes their reward group. The system does this to "lock in" points so that a customer's previous reward account balance would not be affected. In the bonus points ledger, the viewer would see the values of the differences, depending on what reward groups customers were part of — these are large positive or negative numbers indicating reward group changes.

This method allowed the Chronological Report to be smaller, as we did not need to display every reward group change a customer made. It seemed that the reconciled numbers were sufficient because the current balances were 100% accurate. Although, we later realized that showing these summarized entries defeated the report's intention of showing historical details.

Why Our Customers — And Even Our Own Customer Service Department — Requested The Report Change

While the report's data was technically accurate, many customers were still asking, "How did I get that many reward points?" Somewhere along the line, we forgot that the entire point of this report is to make your life easier — to provide assurance to customers that their point balances are error-free. So, with this update we're providing everyone a much-needed improvement.

The Report Did Not Display Reward Group History

In the previous Chronological Report, we did not display the historical group multiplier for each transaction. This caused confusion for dealers using more than one reward group, as we only included the reconciled values instead of line-by-line breakdowns.

Even though the report always displayed a customer's reward balance correctly, the main point of confusion involved the "running total" field. This is because the field is calculated based on the previous line entry; and since the previous line entry did not contain the reward group multiplier, the report does not calculate what a customer's point balance was on a given day.

It's not until the reconciliation line item is included into the calculation that the running total field becomes accurate. However, once that occurs, the details are no longer there — only a balance.

Normally, you can just quickly do the math and see how the running total values are calculated. You would only notice problems with customers that have a lot of transactions while changed reward groups (since you don't have the line-by-line history of the reward groups). We find this can be very confusing when trying to understand the report and provide explanations to customers.

HERE ARE THE CHANGES WE MADE TO THE REPORT

- **We Added the Daily Group Multiplier**

"The Group Multiplier Field" now displays what the group multiplier was on the day of a transaction rather

than the customer's current reward group (at the time of running the report). This provides an accurate "running total" by day, each row showing the customer's point balance and reward group "as it was."

- **We Hide the Group Locking Entries**

"The Group Change Locking" reconciliation entry really has no bearing on the overall points now that the daily group multiplier is listed. Previously, having this field was critical since there was no way of readily seeing what reward group a customer was in. But now that you can see the groups, it's better to just not display. It would only cause more confusion; the daily totals are more important to see.

NOTE: The Chronological Report will only display group multipliers on purchases made on or after May 1st, 2017.

PLEASE REMEMBER, THESE CHANGES ARE JUST TO MAKE THE REPORT EASIER TO READ - NO DATA HAS CHANGED!

IF YOU HAVE QUESTIONS, CALL US AT 414-326-4100.
