

Reportal User Guide

Reportal Benefits

- Reports are more compact and fit on a screen without scrolling
- Load time is much faster with no waiting under normal circumstances
- Reports are processed faster with data up to date each day

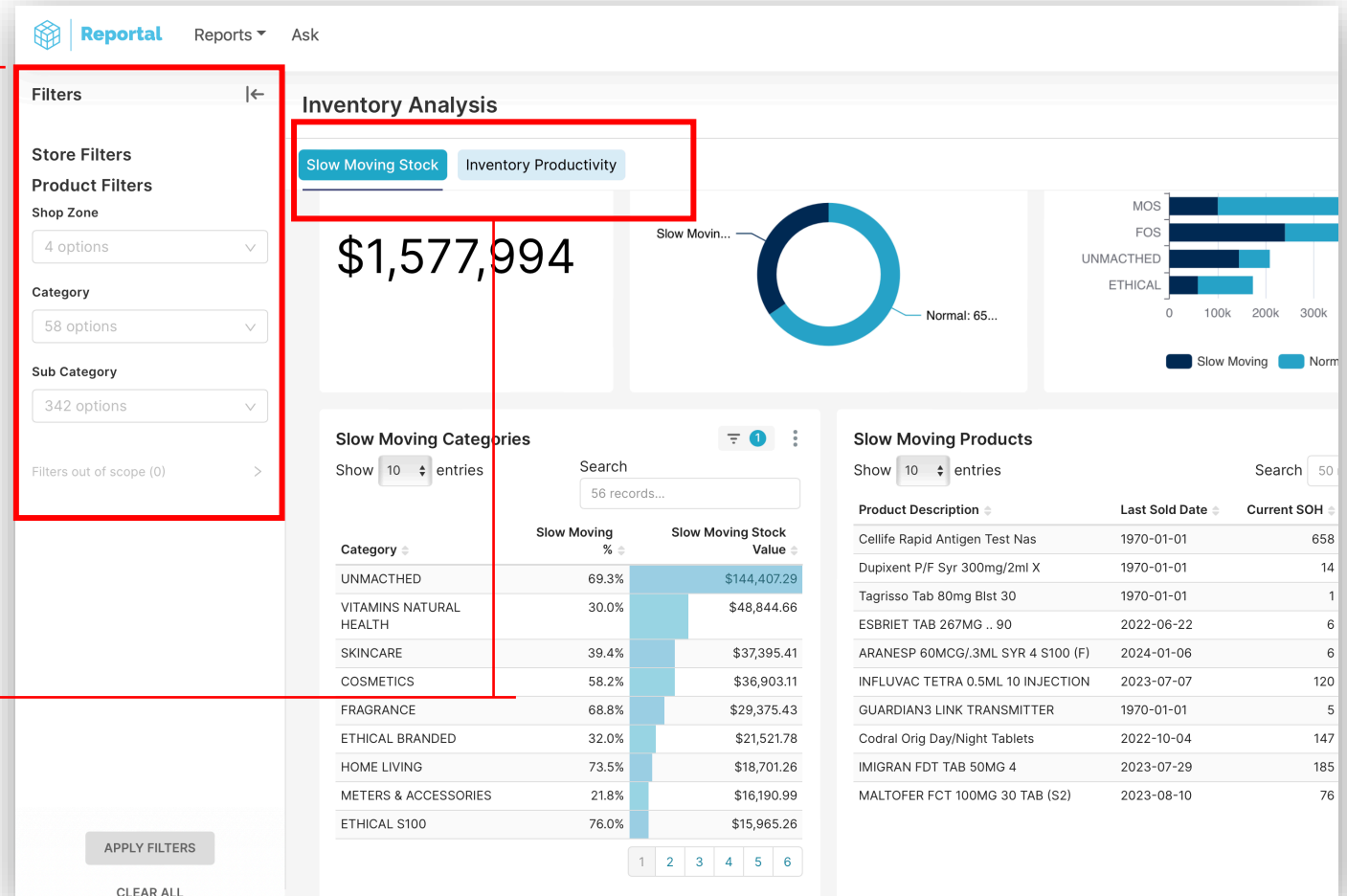
Differences

Filters

Filters appear on the left of the report. Use filters to change date range, categories or other report content.

Tabs

Reports are laid out in tabs to avoid scrolling and keep information on one screen. Each tab serves a single purpose so you won't have to switch between tabs in a report.



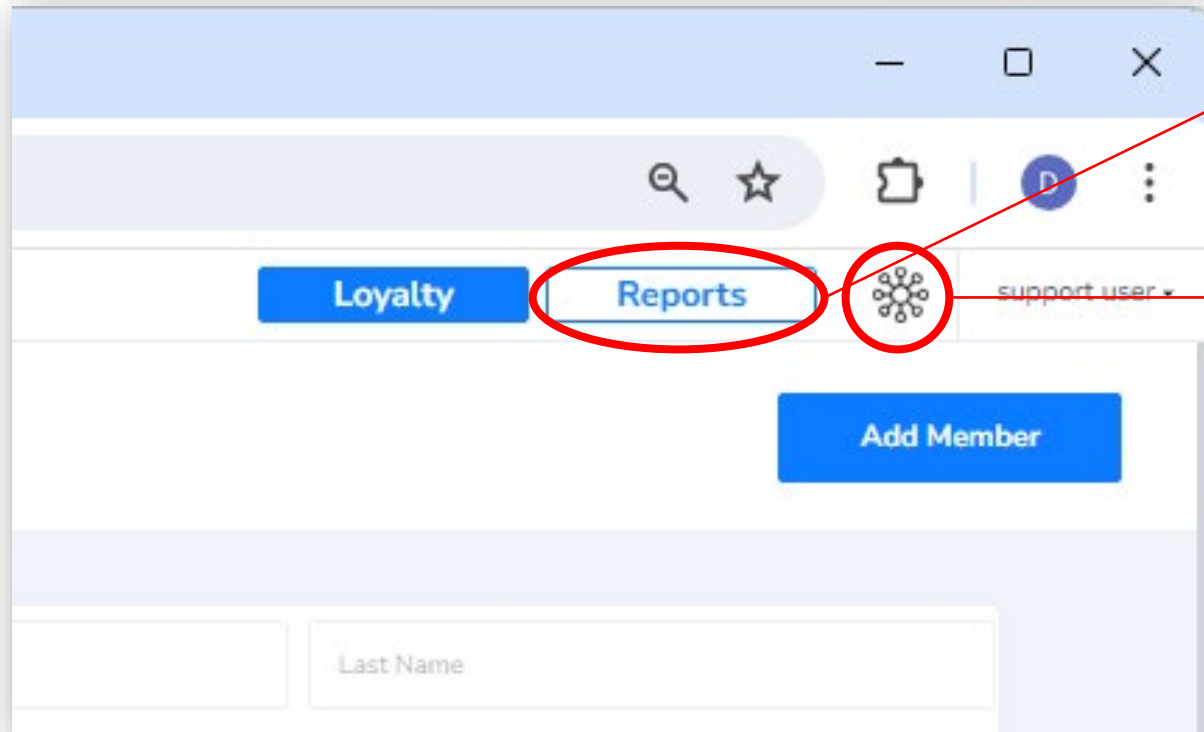
Change to log in journey

My Pharmacy Rewards now lands on member management.

The screenshot displays the 'Members' management page for the Independent Pharmacies of Australia Group. The interface includes a top navigation bar with 'Loyalty' and 'Reports' buttons, and a 'support office' dropdown. The main header features the company logo and the title 'Members', with an 'Add Member' button on the right. A left-hand sidebar contains navigation options: 'Members' (selected), 'Promotions', 'Pricing Promotions', 'Help Resources', and 'User Management'. The central content area is a search form with input fields for 'Card Number', 'First Name', 'Last Name', 'Email', and 'Mobile'. It also includes a 'Search' button, a 'Clear All' button with a refresh icon, and a 'Search All' button. Below the search fields are three dropdown menus labeled 'All Store Groups', 'All Stores', and 'Active'. A large white box at the bottom of the search area contains the text: 'Search for members by firstname, lastname, email, cardnumber or mobile'.

Change to log in journey

'Reports' now links to Reportal.
The Epica link takes users to
the Epica home page.



Where to find your favourite metrics

MPR Reports

Sales Overview

Member Overview

Member Sales Analysis

Department Analysis

Sales & Loyalty

Members Life Cycle

Rewards Analysis

Staff Members

Dead Stock Report

Inventory Productivity

Product Promotional Report



Reportal

Sales Performance Overview

Member Summary

Loyalty Sales Analysis

Loyalty Sales Analysis

Replaced by 'Ask Reportal'

Loyalty Engagement

Loyalty Rewards

Staff Member Analytics

Inventory Analysis

Inventory Analysis

Promotion (Catalogue Report)

NEW REPORTS

1. Sales Performance Overview
2. Script only Sales (Head Office View)
3. Staff Member Analytics
4. Benchmarking
5. Sales by hour of week
6. Inventory Analysis

LOYALTY REPORTS

1. Member Summary
2. RFM Segmentation
3. Loyalty Sales Analysis
4. Loyalty Engagement
5. Loyalty Rewards

Sales Performance Overview

OVERVIEW

The overview tab shows aggregated metrics of

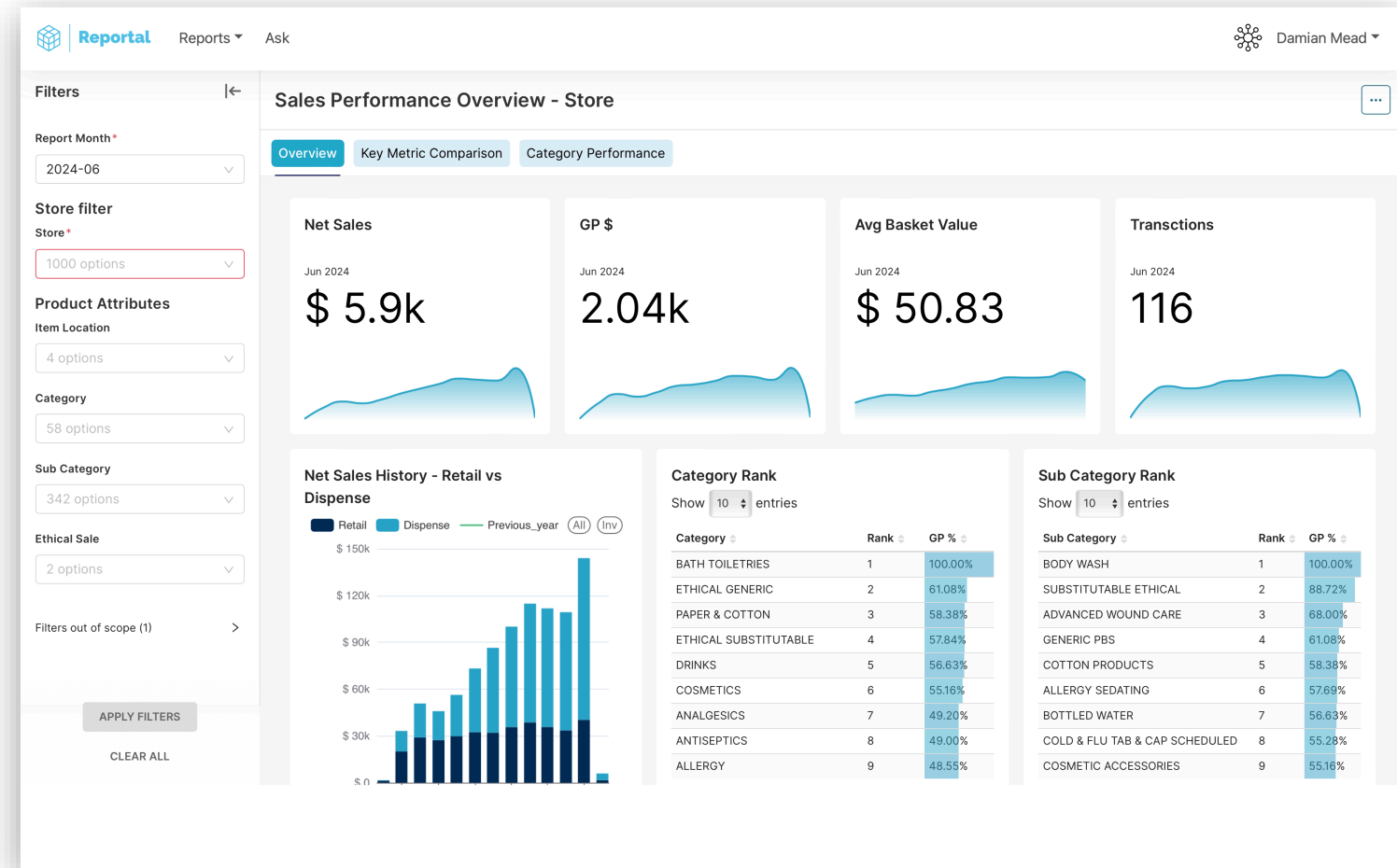
- Net Sales (ex GST)
- GP\$
- Average Basket Value
- Transactions

The report is filterable by

- Shop Zone
- Category
- Sub-category
- And Ethical/Retail sale

The report shows the most recent completed month by default.

Categories used are ranked by GP\$ and are KIA master categories.

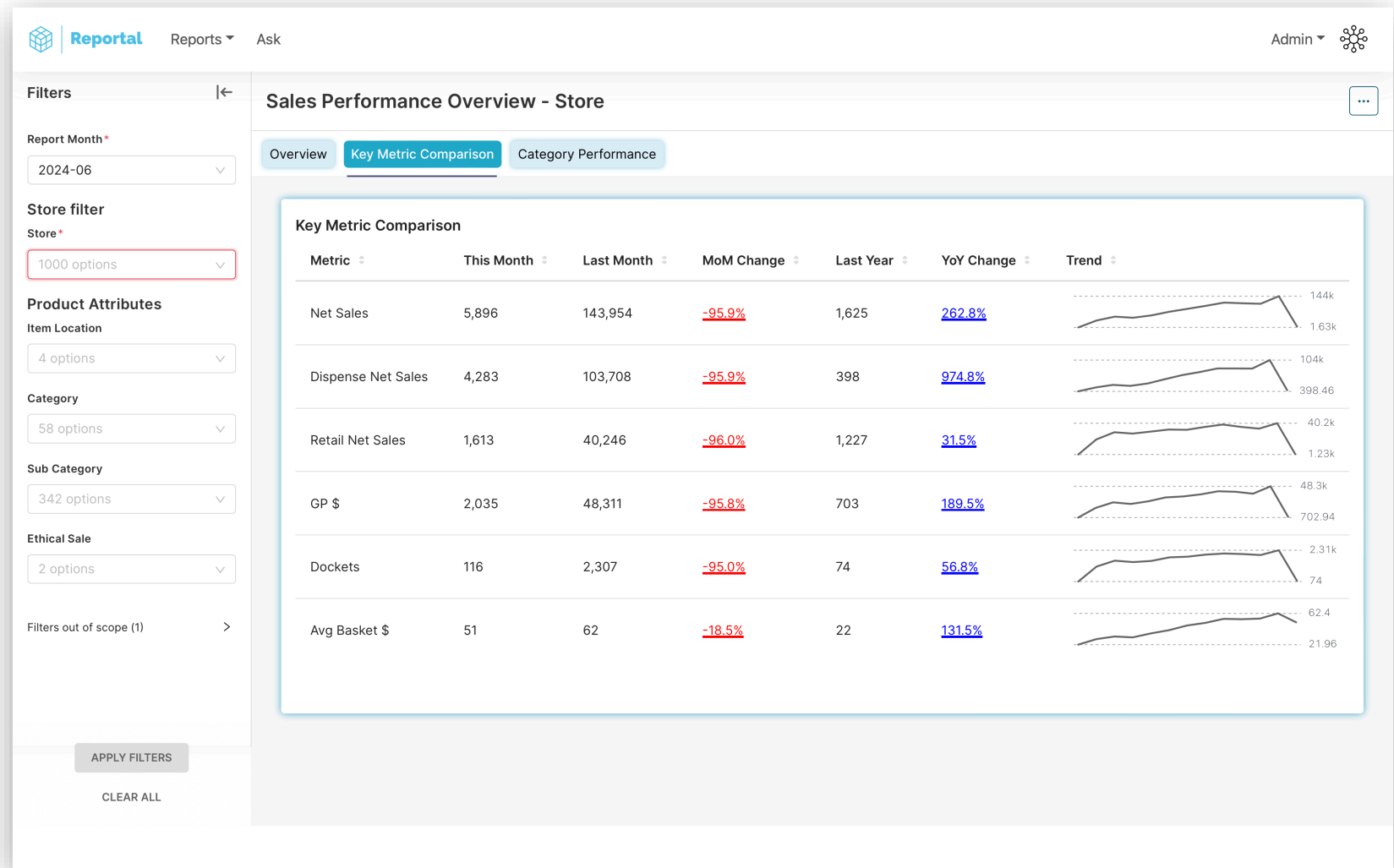


Sales Performance Overview

KEY METRIC COMPARISON

The comparison tab shows metrics for the selected period versus the preceding period, the month-on-month change, the equivalent period last year and the year-on-year change.

The trend line shows how each metric is trending over the last 24 months.



Sales performance Overview

CATEGORY PERFORMANCE

Key metrics are shown aggregated by

- Shop Zone
- Category
- Sub category

Click on any row to filter all other rows on the page.

Any current filters you have applied will be shown on the top of the Filters on the left.

Reportal Reports Ask Damian Mead

Filters

Cross-filters

Sales by Shop Zone

Shop Zone FOS

Sales by Department - Make a selection

Category HAIR CARE

Report Month*

2024-06

Comparison Month*

Last Month

Store filter

Store*

1000 options

Product Attributes

Item Location

4 options

Category

58 options

APPLY FILTERS

CLEAR ALL

Sales Performance Overview - Store

Overview Key Metric Comparison **Category Performance**

Sales by Shop Zone

Shop Zone	Net Sales (Selected)	Net Sales (Comparison)	GP % (Selected)	GP % (Comparison)	Avg Basket \$ (Selected)	Avg Basket \$ (Comparison)	Dockets (Selected)	Dockets (Comparison)
ETHICAL	\$ 2,610.65	\$ 75,411.67	34.33%	28.88%	56.75	78.23	46	964
UNMATCHED	\$ 1,736.98	\$ 31,785.18	25.20%	29.54%	78.95	61.84	22	514
MOS	\$ 1,198.07	\$ 28,569.33	45.11%	46.71%	24.45	29.79	49	959

Sales by Department - Make a selection in shop zone to show sales by department

Category	Net Sales (Selected)	Net Sales (Comparison)	GP % (Selected)	GP % (Comparison)	Avg Basket \$ (Selected)	Avg Basket \$ (Comparison)	Dockets (Selected)	Dockets (Comparison)
HAIR CARE	\$ 74.00	\$ 445.47	47.74%	47.50%	37	26.2	2	17
BABY	\$ 66.00	\$ 689.29	41.53%	42.85%	16.5	15.67	4	44
EAR	\$ 42.00	\$ 228.89	36.48%	44.43%	14	14.31	3	16
SKINCARE	\$ 35.97	\$ 1,473.76	38.73%	44.78%	11.99	18.66	3	79
METERS &	\$ 35.00	\$ 335.76	44.91%	70.90%	35	15.26	1	22

Sales by Sub Department - Make a selection in department to show sales by sub department

Sub Category	Net Sales (Selected)	Net Sales (Comparison)	GP % (Selected)	GP % (Comparison)	Avg Basket \$ (Selected)	Avg Basket \$ (Comparison)	Dockets (Selected)	Dockets (Comparison)
HAIR LOSS	\$ 65.00	\$ 64.99	48.55%	48.55%	65	64.99	1	1
HAIR FIXATIVES	\$ 9.00	\$ 8.99	41.89%	40.16%	9	8.99	1	1
HAIR LICE	\$ 0.00	\$ 139.97	N/A	44.60%	N/A	34.99	N/A	4

Staff Member Analytics

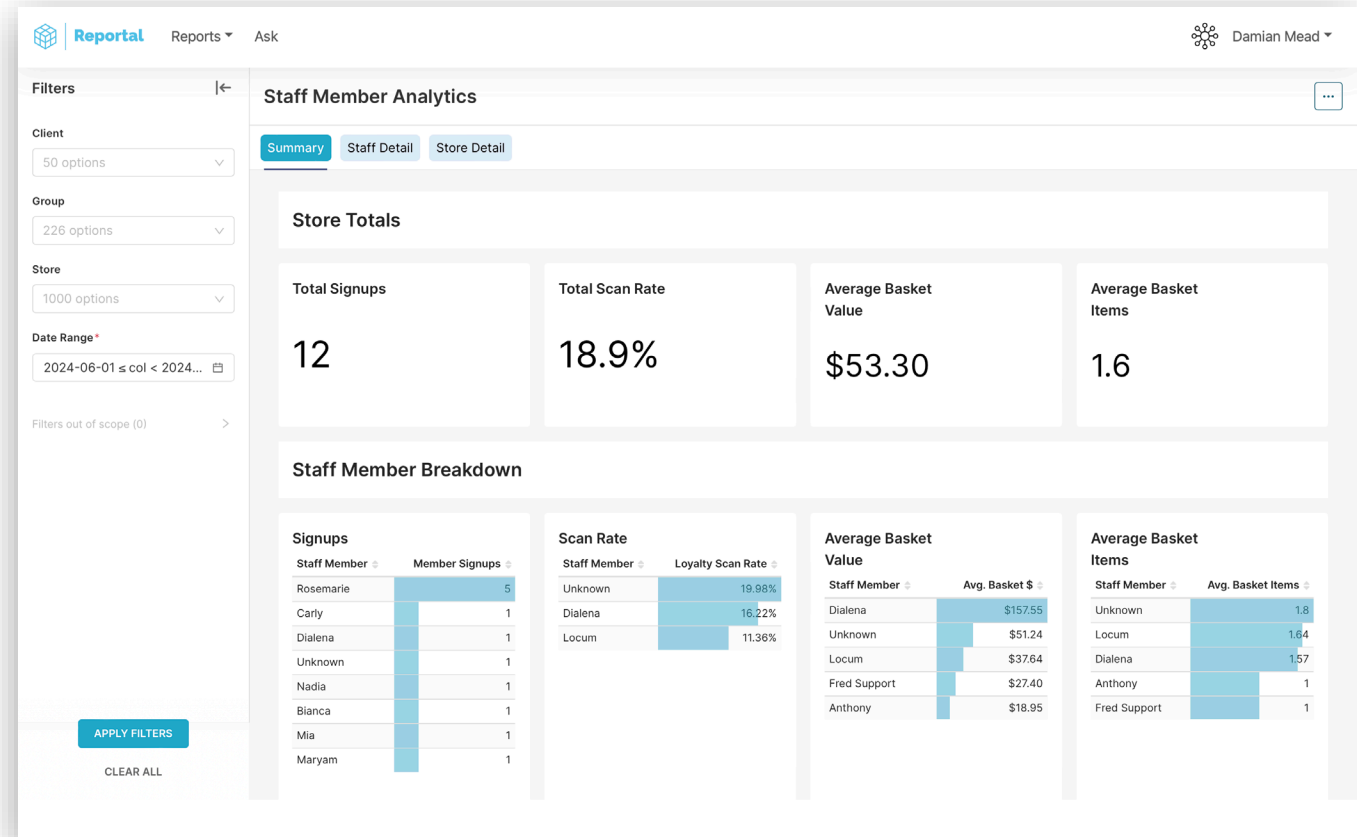
SUMMARY

Key metrics are shown aggregated by

- Sign ups
- Total scan rate
- Average basket \$
- Average basket U

Each staff member is shown in the Staff Member Breakdown. Staff are ranked by the same key metrics:

- **Sign-ups:** The number of sign-ups each staff member has done in the selected period
- **Scan Rate:** The number of loyalty transactions against total transactions
- **Average Basket Value:** The average transaction value per staff member limited to the FOS items in the transaction.
- **Average Basket Items:** The average number of retail items in a transaction per staff member.



Staff Member Analytics

STAFF DETAIL

- The table displays the key metrics of
- Sign ups
- Sales
- Dockets
- Loyalty scan rate
- Average basket \$
- Average basket items

Metrics shown are aggregated for the selected period by staff member. A staff member will only be shown in this table if they have been active in the period.

Staff Member	Member Signups	Sales	Dockets	Loyalty Dockets	Loyalty Scan Rate	Avg. Basket \$	Avg. Basket Items
Anthony	0	\$18.95	1	0	0.0%	\$18.95	1.00
Bianca	1	\$0.00	0	0	N/A	N/A	N/A
Carly	1	\$0.00	0	0	N/A	N/A	N/A
Dialena	1	\$5,829.17	37	6	16.2%	\$157.55	1.57
Fred Support	0	\$986.54	36	0	0.0%	\$27.40	1.00
Locum	0	\$1,656.15	44	5	11.4%	\$37.64	1.64
Maryam	1	\$0.00	0	0	N/A	N/A	N/A
Mia	1	\$0.00	0	0	N/A	N/A	N/A
Nadia	1	\$0.00	0	0	N/A	N/A	N/A
Rosemarie	5	\$0.00	0	0	N/A	N/A	N/A
Unknown	1	\$54,881.72	1,071	214	20.0%	\$51.24	1.80
Totals	12	\$63,372.53	1,189	225	18.9%	\$53.30	1.60

Staff Member Analytics

STORE DETAIL TAB

- The table displays the key metrics of
- Sign ups
- Sales
- Dockets
- Scan rate
- Average basket \$
- Average basket items

Metrics shown are aggregated for the selected period by store. A store will only be able to view their own data in this table.

The screenshot shows the 'Reportal' interface for 'Staff Member Analytics'. The 'Store Detail' tab is active, displaying a table of metrics by store. The table includes columns for Store, Member Signups, Sales, Dockets, Loyalty Dockets, Loyalty Scan Rate, Avg. Basket \$, and Avg. Basket Items. The data is aggregated for the period 2024-06-01 to 2024-06-30. The table shows three rows of data and a Totals row.

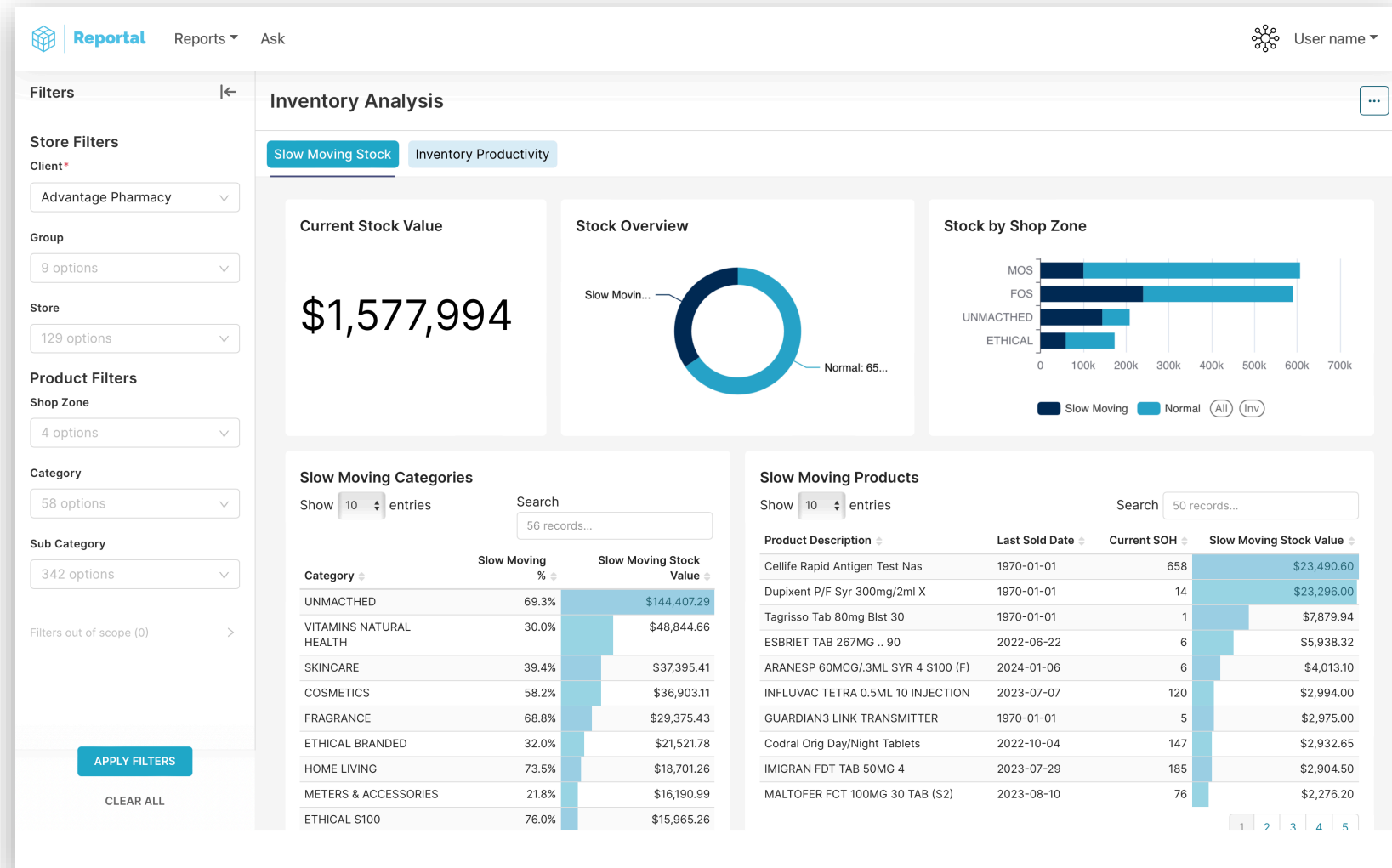
Store	Member Signups	Sales	Dockets	Loyalty Dockets	Loyalty Scan Rate	Avg. Basket \$	Avg. Basket Items
7 Day Pharmacy, Coorparoo	1	\$19,665.18	266	27	10.2%	\$73.93	1.54
7 Day Pharmacy, Coorparoo	3	\$30,924.70	577	154	26.7%	\$53.60	1.90
7 Day Pharmacy, Coorparoo	8	\$12,782.64	346	44	12.7%	\$36.94	1.51
Totals	12	\$63,372.53	1,189	225	18.9%	\$53.30	1.60

Inventory Analysis

SLOW MOVING STOCK

Identify problem categories and products.

- This report highlights stock that has not sold in the last 90 days.
- View the cost value of slow-moving stock by category and select a category to show the worst performing products in that category.
- To use this report, target the top items in each category to get the most benefit.
- As an exception report not all products will genuinely be slow-moving lines. Skip over any products that are new in store and focus on the problem stock.



Inventory Analysis

This report highlights the general performance of stock in the store.

GMROI:

- The gross margin return on investment (GMROI) assesses how much profit inventory sales produce after covering the costs of inventory.

*Calculation: Last 180 days sales GP \$ annualised (/180*364) / SOH Value*

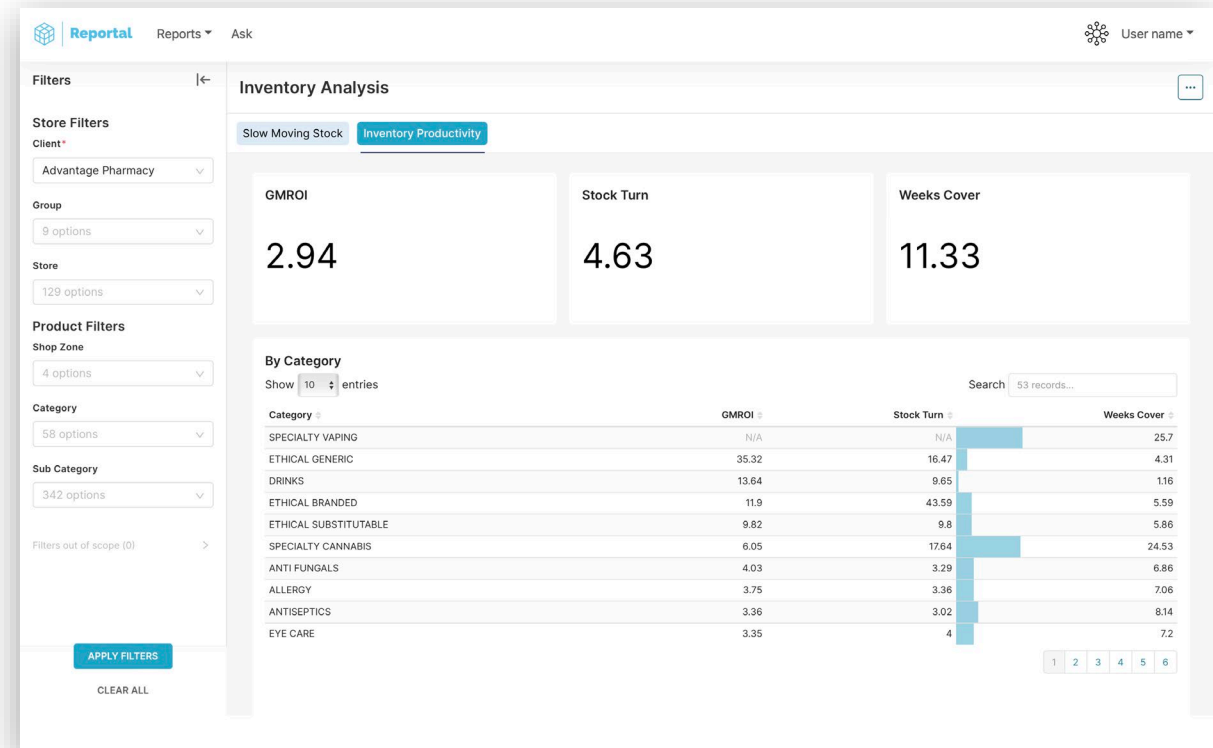
Stock turn:

- Stock Turn : Stock turn measures operational efficiency by assessing how many times total inventory is sold over a period.

*Calculation: Last 180 days sales cost annualised (/180*364) / SOH Value*

Weeks Cover:

- Weeks Cover: Weeks cover assesses how long your stock will last given your current rate of sale and stock holding.
Calculation: SOH Qty / (Last 180 days Sales Qty / Weeks in 180 days (25.7))



RFM Segmentation

RFM Segmentation breaks up your membership into understandable groups.

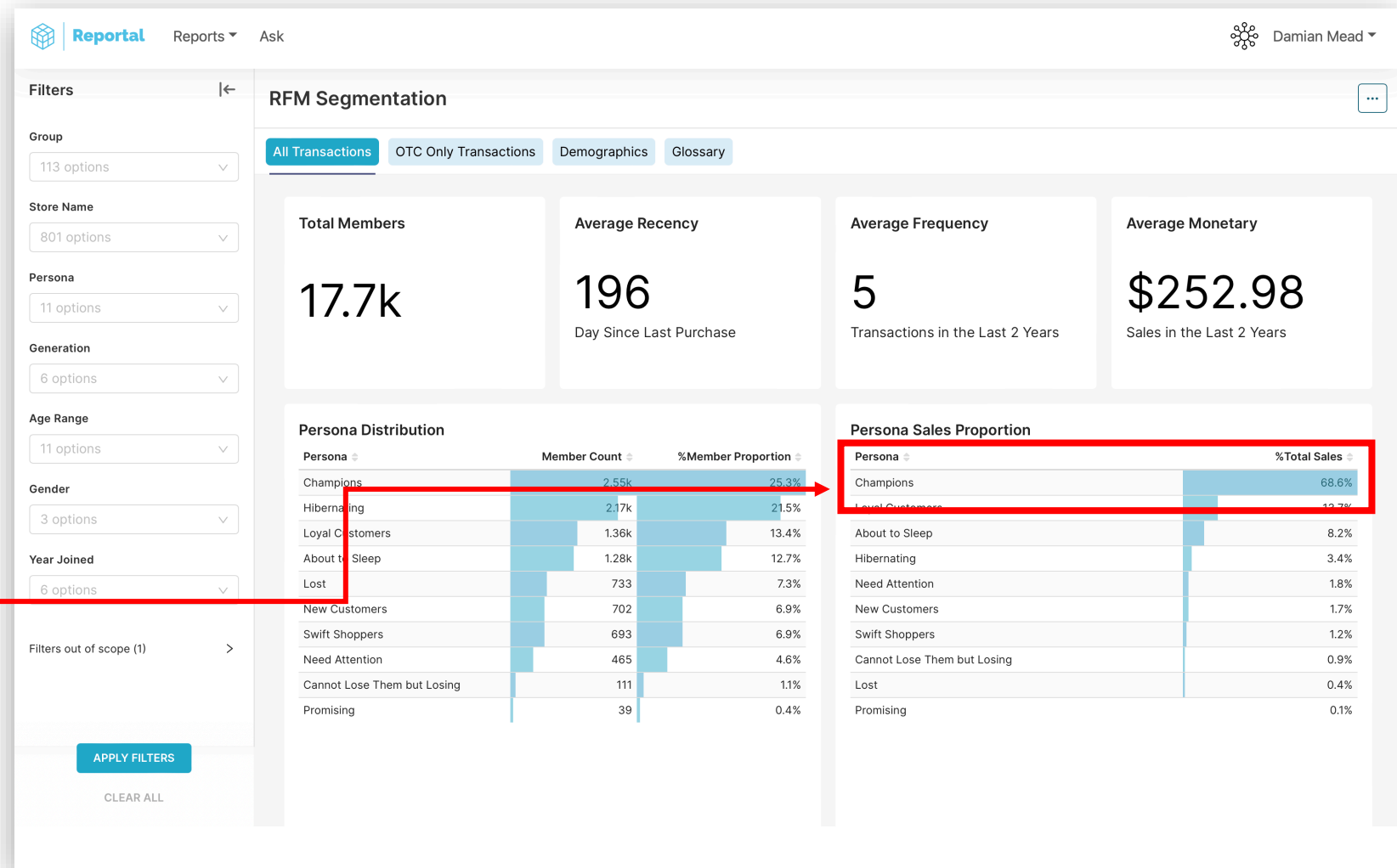
Using Recency (how recently the member has shopped), Frequency, how often the member shops and Monetary (how much money the member has spent).

The system uses RFM values from 1 to 5 to create personas.

In the screenshot on the right, you can see that 25% of the members are responsible for 68% of the sales.

Good practice is to try to move each persona up into the next level.

Use the OTC Only transactions tab to limit to retail purchases only.

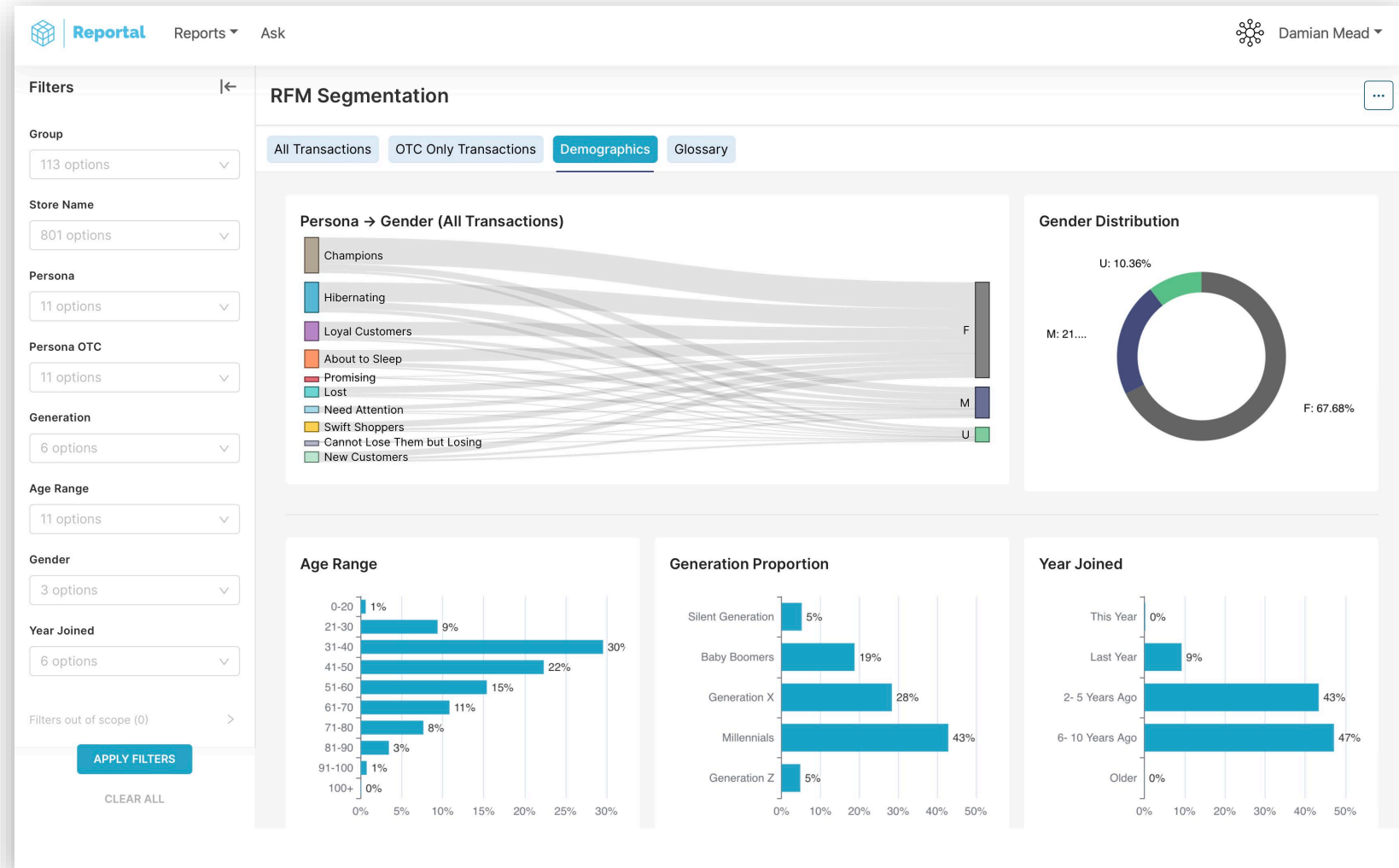


RFM Segmentation

DEMOGRAPHICS

- Collecting good data when signing up a member is invaluable.
- The Demographics tab helps you understand your valuable customers by age range, gender or generation.
- Generations are defined for this purpose as:

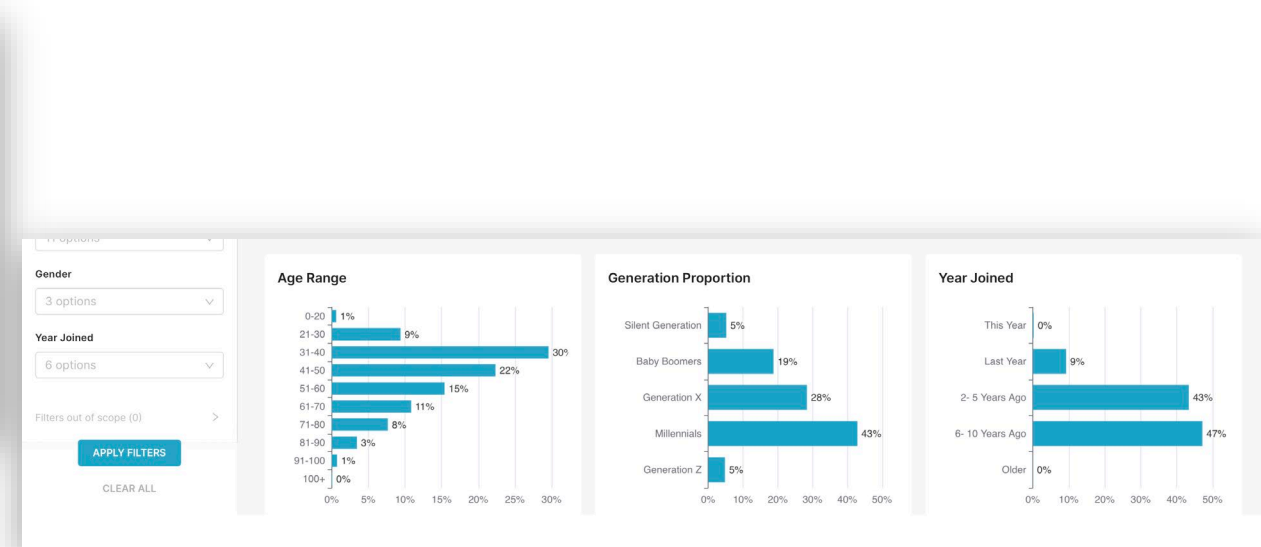
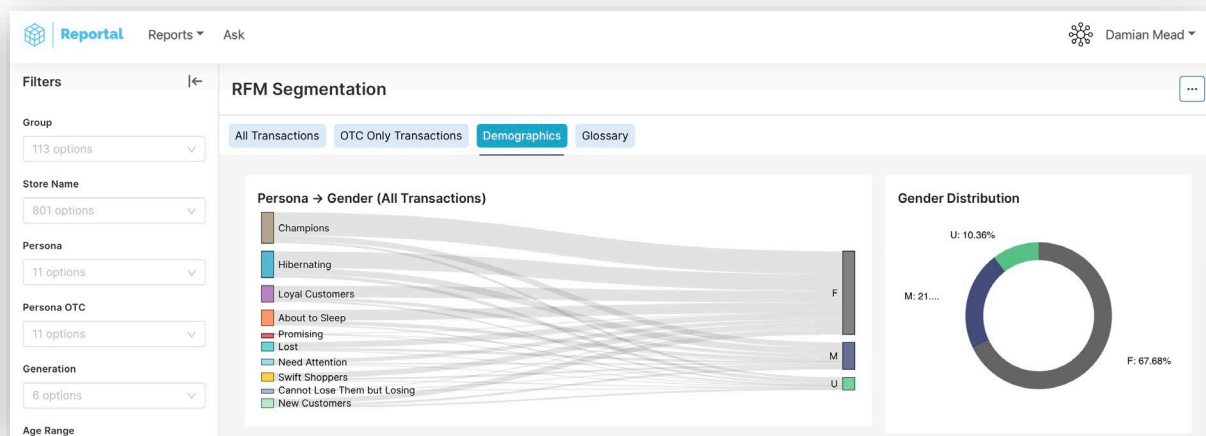
Generation	Year of Birth
Generation Alpha	2011 - 2021
Generation Z	1996 - 2010
Millennials (Gen Y)	1981 - 1995
Generation X	1966 - 1980
Baby boomers	1946 - 1965
Silent Generation	1945 or earlier



RFM Segmentation

PERSONA DEFINITIONS

- **Promising** Customers who have made purchases fairly recently but their frequency and monetary value are relatively low.
- **Champions** Your best customers, who shop frequently and spend a lot.
- **Cannot Lose Them but Losing** Customers who used to shop frequently and spend a lot, but they've been less active recently.
- **Lost** Customers who haven't made a purchase in a long time and have low overall engagement.
- **New Customers** Customers who have made their first purchase recently.
- **Need Attention** Customers who were once active and spent a decent amount but have been less engaged recently.
- **Swift Shoppers** Customers who shop frequently and have made a purchase recently.
- **Loyal Customers** Customers who shop regularly and have been doing so for a long time.
- **Hibernating** Customers who haven't made a purchase in a long time and have low engagement levels.
- **About to Sleep** Customers who have been inactive recently and might need a re-engagement campaign.



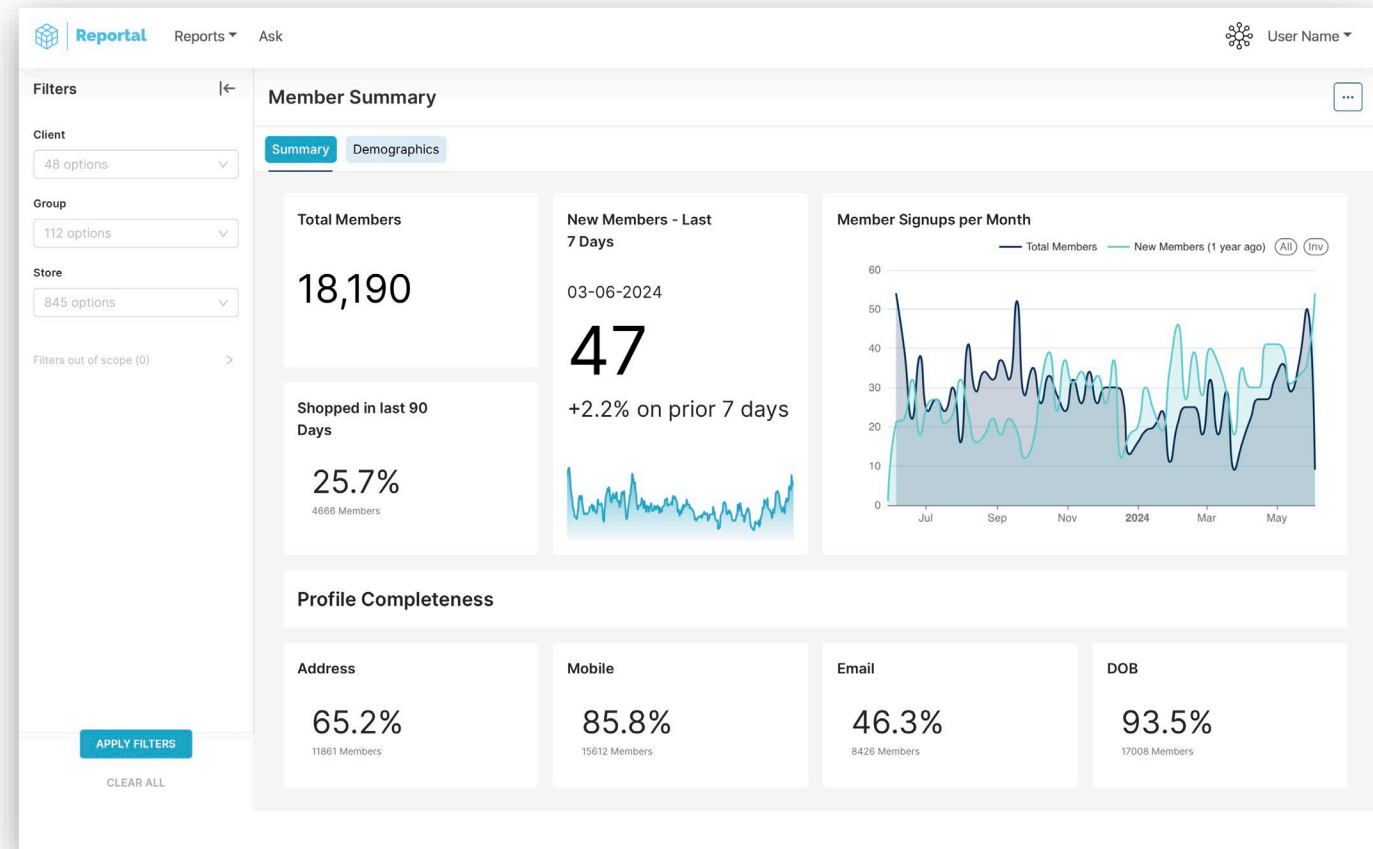
Member Summary

SUMMARY

- This dashboard shows the total health of your membership.
- How many active members you have (ie members who are not cancelled). To know if this is a good figure you can ask 'How does this compare to the size of your active dispensary database or total number of customers'? Ideally the majority of your customers should be in your loyalty system.
- How many new members you are still adding. New customers will always be coming to your store so this figure should show a high proportion of those new customers.

Profile completeness

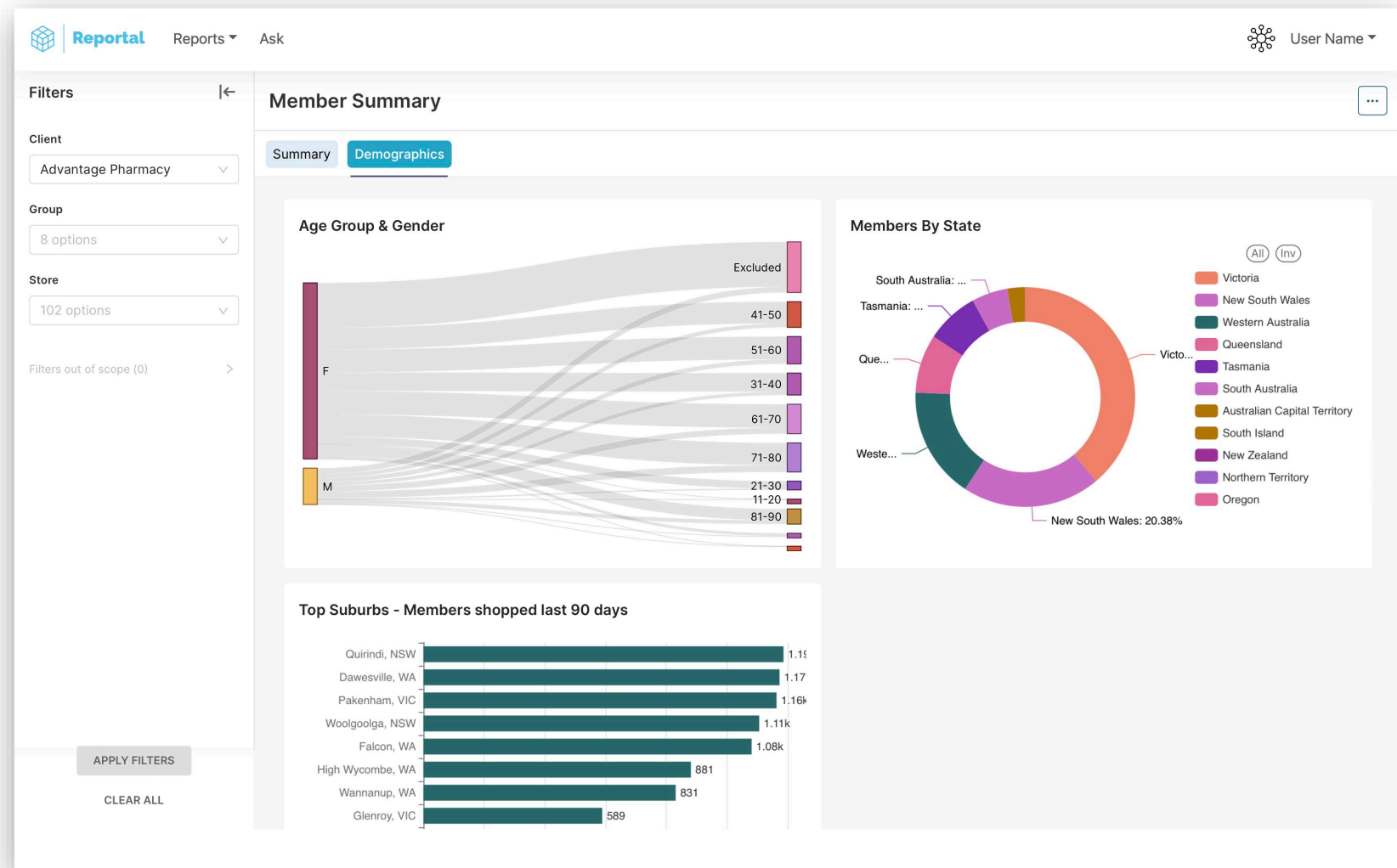
- It is essential to collect as much accurate information as possible. Always aim for above 80% mobile and 60% email address completion. Note that the email metric does not consider if the member has unsubscribed.



Member Summary

DEMOGRAPHICS

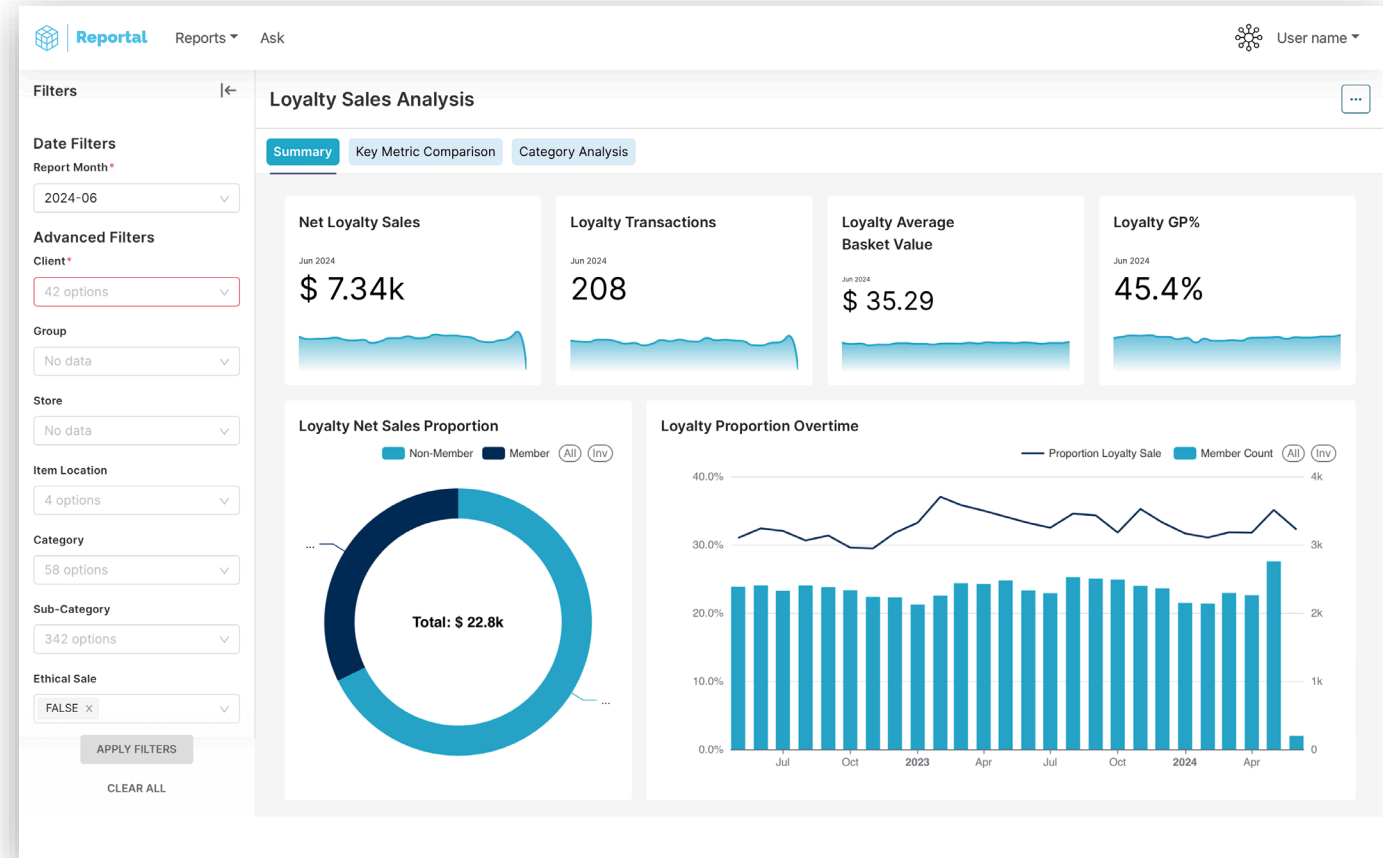
- Your membership is shown broken up by age and gender, state and suburb.
- For an individual store it can be useful to consider which suburbs members are from when running campaigns and catalogues.



Loyalty Sales Analysis

SUMMARY

- **Net loyalty sales** are shown for the selected period. The last two years are shown in a trend chart under the total. The month in progress is included in the chart and will dip down until the month is complete.
- **Loyalty transactions**, IE any transaction where a loyalty card was scanned is shown with a trend chart showing the last 2 years by month.
- Average basket value in \$ is shown for the selected period along with a trend chart for the last 2 years by month.
- Loyalty GP% is shown for the selected month along with a 2 year trend chart.
- **Loyalty Net Sales Proportion** shows the value of member sales as a proportion of total sales. This is calculated as the sales amount including govt contribution.
- **Loyalty Proportion over time** shows the trend of the proportion of loyalty sales over time

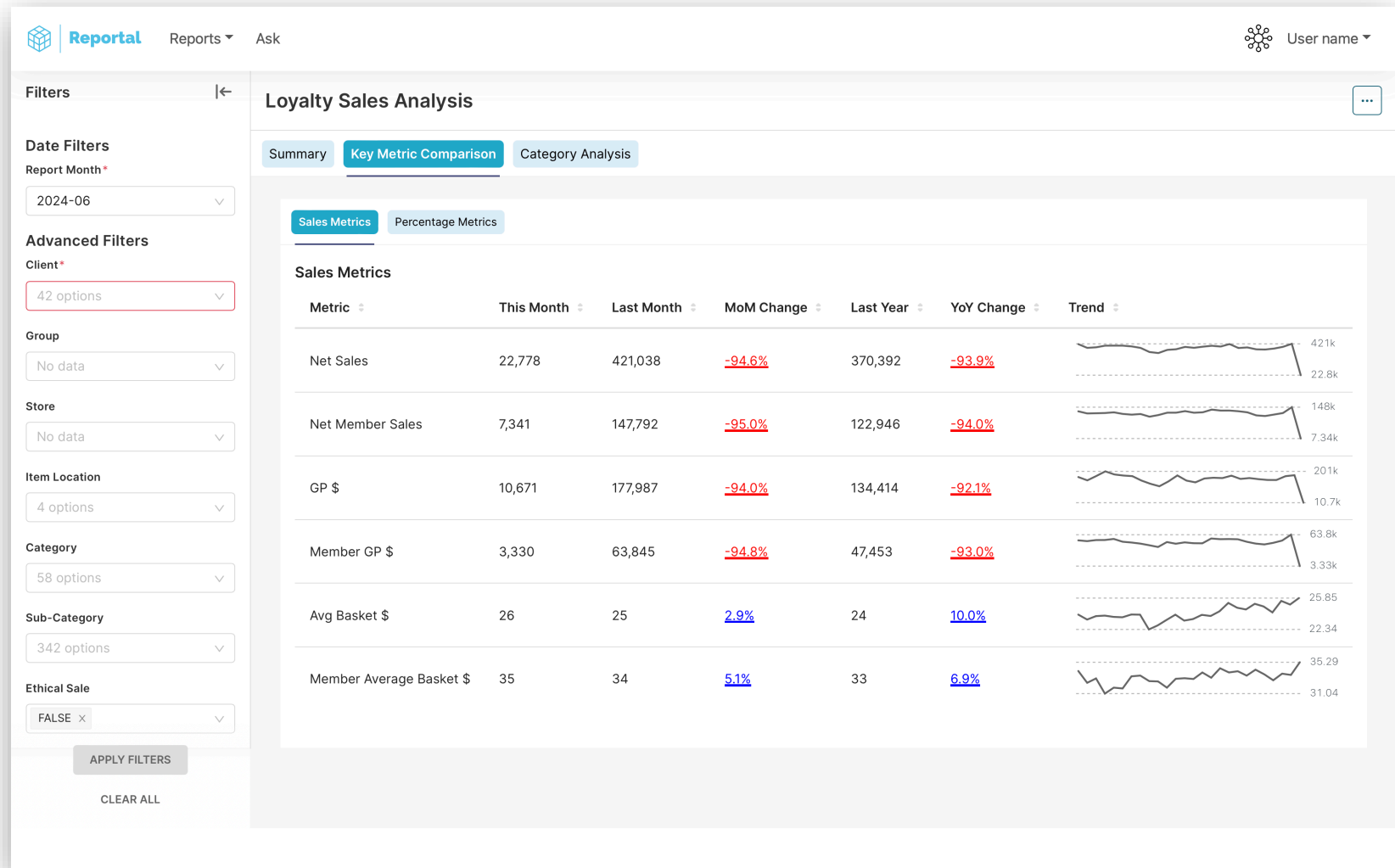


Loyalty Sales Analysis

Key Metric Comparison Tab

The Metric Comparison shows how each metric is trending against the previous month and year to identify growth or shrinkage.

- The following key metrics are shown for the current and previous month; the current and previous year and the year on year and month on month percentage change. A trend line is shown for the last two years.
- Net loyalty sales
- Loyalty transactions
- Loyalty GP
- Loyalty Net Sales
- Loyalty Proportion over time



Loyalty Sales Analysis

CATEGORY ANALYSIS

The category analysis shows how each category is growing over time for the selected period against the previous period.

- The categories shown are Know it All's master categories.
- Selecting a category filters the sub-category table.
- Ethical sales are excluded by default but can be re-included using the filter on the left.

The screenshot displays the Reportal interface for a Loyalty Sales Analysis. The top navigation bar includes the Reportal logo, 'Reports' dropdown, 'Ask' button, and a user profile icon labeled 'User name'. The main content area is titled 'Loyalty Sales Analysis' and features three tabs: 'Summary', 'Key Metric Comparison', and 'Category Analysis' (which is active). On the left, a 'Filters' sidebar contains several sections: 'Date Filters' with 'Report Month*' set to '2024-06' and 'Comparison Month*' set to 'Last Year'; 'Advanced Filters' with 'Client*' set to '42 options'; 'Group' set to 'No data'; 'Store' set to 'No data'; 'Item Location' set to '4 options'; 'Category' set to '58 options'; and 'Sub-Category' set to '342 options'. At the bottom of the filters are 'APPLY FILTERS' and 'CLEAR ALL' buttons. The main content area shows two tables: 'Category Sales' and 'Sub-Category Sales'. Both tables have a search bar and a record count. The 'Category Sales' table has 56 records and compares 'Selected' and 'Comparison' data for Net Sales and Dockets across various categories. The 'Sub-Category Sales' table has 290 records and provides a more granular view of the same data.

Category	Net Sales (Selected)	Net Sales (Comparison)	Dockets (Selected)	Dockets (Comparison)
COLD & FLU	\$ 3,219.07	\$ 59,996.69	160	2,975
VITAMINS NATURAL HEALTH	\$ 2,529.21	\$ 50,271.97	69	1,445
ANALGESICS	\$ 2,231.00	\$ 46,685.20	148	2,902
STOMACH & GI	\$ 1,927.88	\$ 26,988.04	97	1,545
BABY	\$ 1,492.15	\$ 22,436.30	58	907
SKINCARE	\$ 1,309.75	\$ 18,068.75	62	983
ALLERGY	\$ 1,039.25	\$ 18,943.01	55	1,029
UNMATCHED	\$ 920.11	\$ 10,361.54	80	1,249
METERS & ACCESSORIES	\$ 950.44	\$ 1,721.11	43	104

Sub Category	Net Sales (Selected)	Net Sales (Comparison)	Dockets (Selected)	Dockets (Comparison)
COLD & FLU TAB & CAP SCHEDULED	\$ 1,178.15	\$ 20,172.17	59	987
ANTI INFLAMMATORY	\$ 921.23	\$ 11,904.68	60	809
UNMATCHED	\$ 920.11	\$ 10,361.54	80	1,249
BABY FOOD / FORMULA	\$ 844.67	\$ 13,122.83	21	376
ALLERGY NON SEDATING	\$ 701.30	\$ 10,333.79	36	488
ANTACIDS	\$ 671.00	\$ 6,617.03	36	441
CHILDREN ANALGESICS	\$ 665.30	\$ 22,757.51	30	1,064

Technical Support

 1300 814 821

 support@knowitall.net.au