Customer Engagement

User Guide
Global Payments Analytics

Transform your business data into insights to improve decision making and help your business grow.
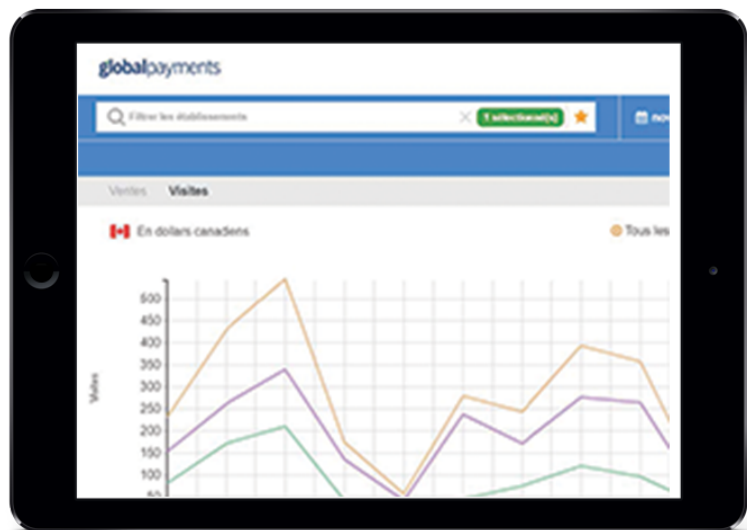

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Introduction

Global Payments Analytics is a web-based application that analyzes customer business data – payment card data and online and social media metrics – to deliver insights to help drive informed decision making.

Analytics includes two (2) modules:

Analytics ("Core") – tracks key metrics for new vs. returning customers, including:

- Sales volume

- Total visits

- Average ticket size

- Visits and sales by day and time

Social Reputation Management – Reputation is everything. Manage it effectively with:

- A single dashboard providing access to customer reviews from popular online and social media sites

- One-click access to view and respond to customer reviews

- Online reputation competitive comparison, to see how your business stacks up against the competition

Getting started

The Analytics application is accessible within BusinessView, providing you with a single platform for reporting and insights.

Within BusinessView, access Analytics within the **Applications** menu. Clicking on the **Analytics** link will launch the application in a new window.

Within the Analytics application, the top navigation allows you to toggle between **ANALYTICS** and **REPUTATION**, as well as exit the application, and it includes the date range and location selectors. The navigation is static and remains visible as you scroll through the page.

The body section contains the various graphs and charts that display sales insights, driven by the selections made in the navigation.
If the application does not detect any user activity for 15 minutes, it will display a timeout message:
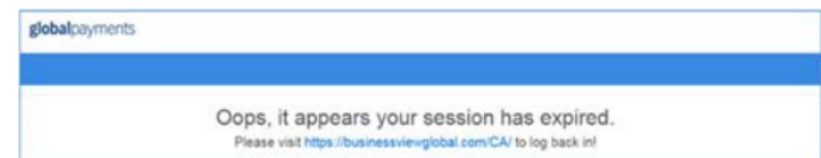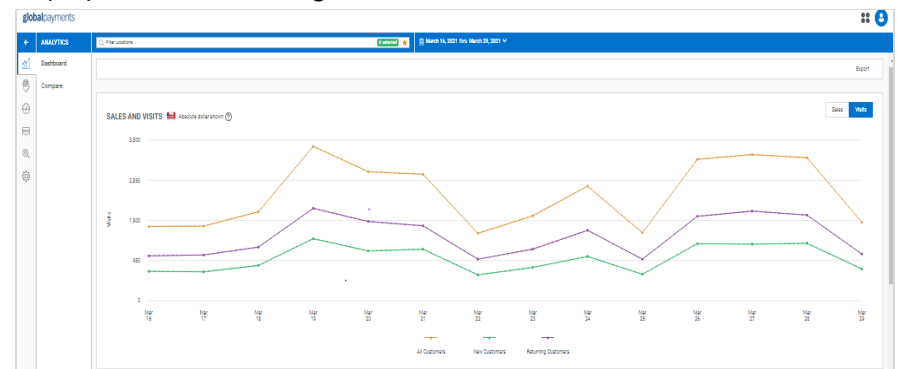
Menu items

Module Selector

From the top navigation, you can toggle between the two available Analytics modules and exit the application. The Analytics modules are:

- **Analytics** – analyzes data from the payment cards used at your business

- **Reputation** – enables you to view and respond to customers' online and social media reviews and feedback


Business location selector

In the bottom left of the top navigation is the location selector. If you have more than one business location, this option allows you to select the application location(s) for their reporting. By default, all locations are selected when you log into the Analytics application.

Date range selector

Near the bottom left of the top navigation, the date range selector allows you to choose a reporting period. Several predefined time periods are available to choose from (i.e. Yesterday, Last 7 Days, This Month, etc.). You can also use the calendar tool to define your own reporting period.
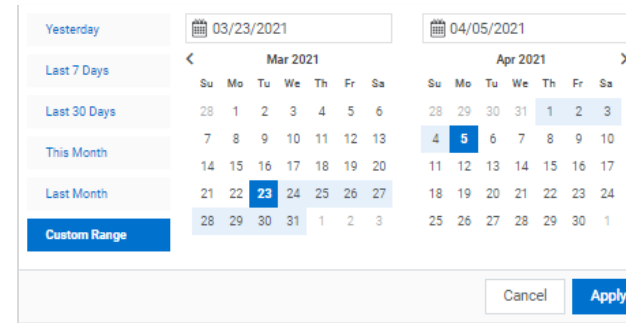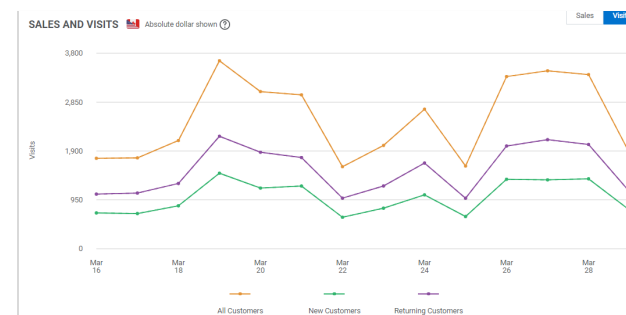

How it works

Analytics module

The Analytics module provides information based on an analysis of the payment cards used at your business. The Analytics module contains the following sections:

- **Sales and Visits** – graphical representation of sale amounts and number of visits, for new customers, repeat customers, and all customers.
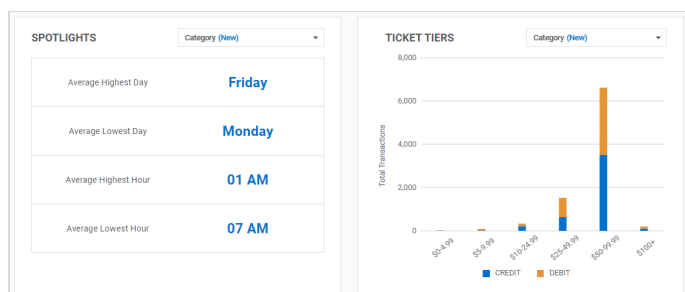

- **Sales, visits, and average ticket** – table representation of sale amounts and number of visits, for new customers and repeat

customers, with trend indication.

- **Spotlights and ticket tiers** – display the busiest and least busy days and times for the business, as well as the ratio of credit card purchases to debit card purchases, for new customers, and repeat customers.


- **Sales and visits by time segments** – graphical representation of sales amounts and number of visits, for morning, afternoon, and evening time segments, for new customers, repeat customers, and all customers.
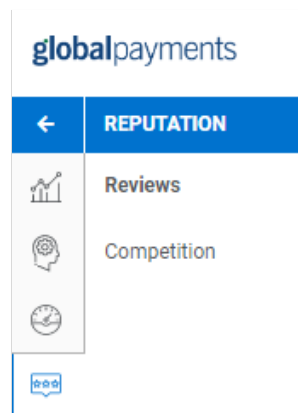

Reputation module

The Reputation module provides the capability for you to view and respond to online and social media reviews and commentary, and to compare your business' online presence to that of a competitor.

The first time that you access the Reputation module, a Terms and Conditions pop-up is presented, which you must review and accept in order to proceed.
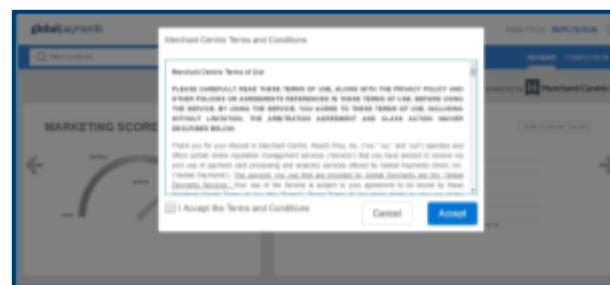

Once you have accepted the Terms and Conditions, two sub-menu items will appear:
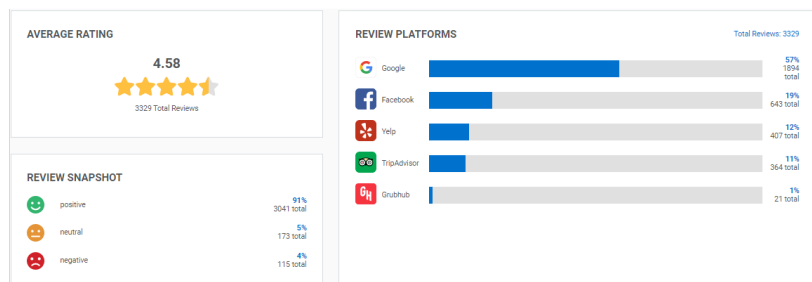
Reviews

The Reputation module's **Reviews** submenu contains the following sections:

- **Marketing Score** – based on how a business is doing across four areas: 1) reviews, 2) promotions, 3) social reputation, and 4) online visibility. Since it changes based on performance, it can be used to measure progress and track how a business compares to the competition

- **Social Reputation Rating** – the average star rating for each of the past three months. The associated **Customer Trends** button, can be used to show or hide customer sales and visits trends on the same graph
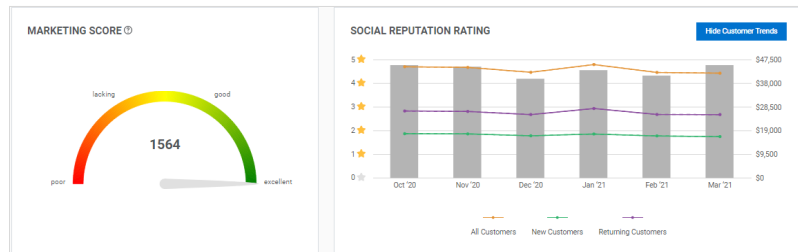
- **Overall Average Rating** – the current overall average from all ratings

- **Review Snapshot** – colour-coded representation of the nature of your business' current online and social media reviews, as well as a breakdown of review activity across the review sites contributing to its rating
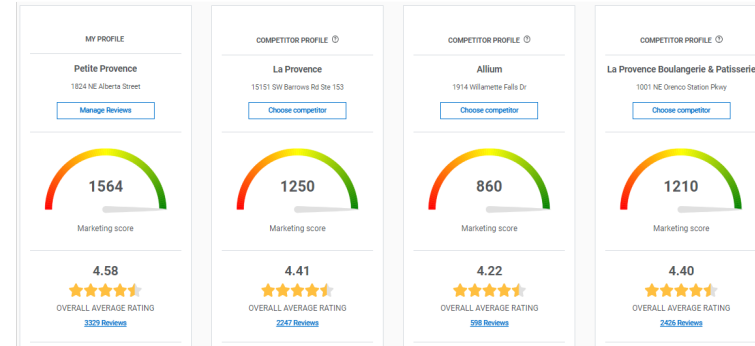

- **Reviews** – comments from customers made on popular online review and social media sites, with the option to view and reply directly from the Analytics application

Competition

The Reputation module's "Competition" sub-menu displays the profile of your business alongside the profile of a competitor, including online reviews for the competitor.

Review sites supported

The following online review and social media sites are supported through the Analytics application:

- Caring.com

- Citysearch

- Facebook

- Foursquare

- Google

- OpenTable

- SeniorAdvisor

- Superpages

- TripAdvisor

- Yahoo

- Yelp

Replying to reviews

The review sites create listings for businesses that they become aware of. The listings typically include a "Claim Listing" link, for business owners to use to claim the listings.

To claim a listing for your business, you will need to prove to the review site that you are its owner. In some cases, the process of proving ownership is as simple as the review site calling the number listed for the business, and the owner answering.

Once ownership of a listing is claimed, the owner is allowed to establish "credentials" for accessing the listing. Those credentials include a username and password, and are required whenever the owner wishes to reply to reviews. The first time that you attempt to reply to a review from within Analytics, you will be prompted for the username and password for the corresponding site.

Selecting a competitor

The competitor originally listed in Analytics is selected automatically. If you wish to have another competitor listed, contact Global Payments at 1.800.608.8620. You will need to provide the following competitor business information:

Name
Address
Phone number
Website URL

Closing the Analytics application

To close the Analytics application, click on the encircled **X**, located to the right of the Reputation module items, in the top right hand corner of the Analytics window.