

Customer Ranking

Overview

Customer Rankings provide an easy way to see a customer's standing with your store. Key statistics are displayed, and metrics provided. These appear on the **bottom** of the **General** tab of the **Customer Display**.



Please note that for **multi-store** users, rankings are calculated **company wide**. They are **NOT** store specific.

Date Entered Customer Since 8/5/2022	Recent Sale 10/19/2023	Item Count 8	Total Items \$23,375.00
Transaction Count 35	Transaction Total \$74,495.94	Transaction Avg \$2,128.46	Service Total \$500.00
Overall Rank #35	Merchandise Rank #64	Repair Rank No Rank	Transaction Rank #17

Overall Rank	The customer's overall rank in your store based on total dollars spent.
Merchandise Rank	The customer's rank based on merchandise purchases.
Repair Rank	The customer's rank based on the amount spent on custom and repair jobs.
Transaction Rank	The customer's rank based on the number of transactions made.

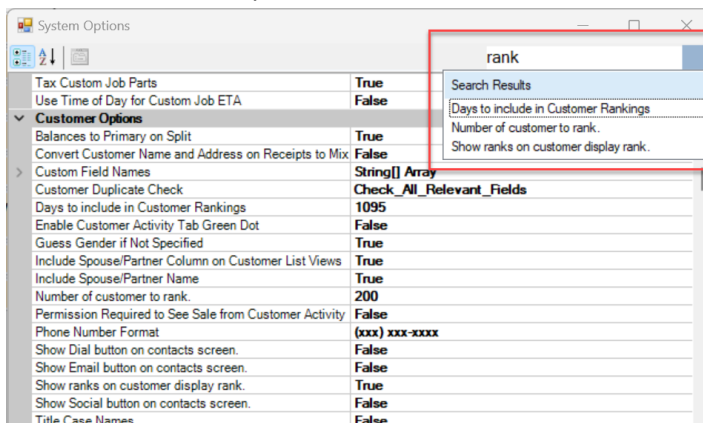
Setup

There are three new **System Options** and an **Associate Permission** added that are relevant to this feature. The **Associate Permission** is required to **Edit** or **Delete** your **Customer Rankings**.

System Options

To access System Options:

1. Navigate to **Administrative > System Options**.
2. To see all available options, use the **search bar** and search **Rank**.



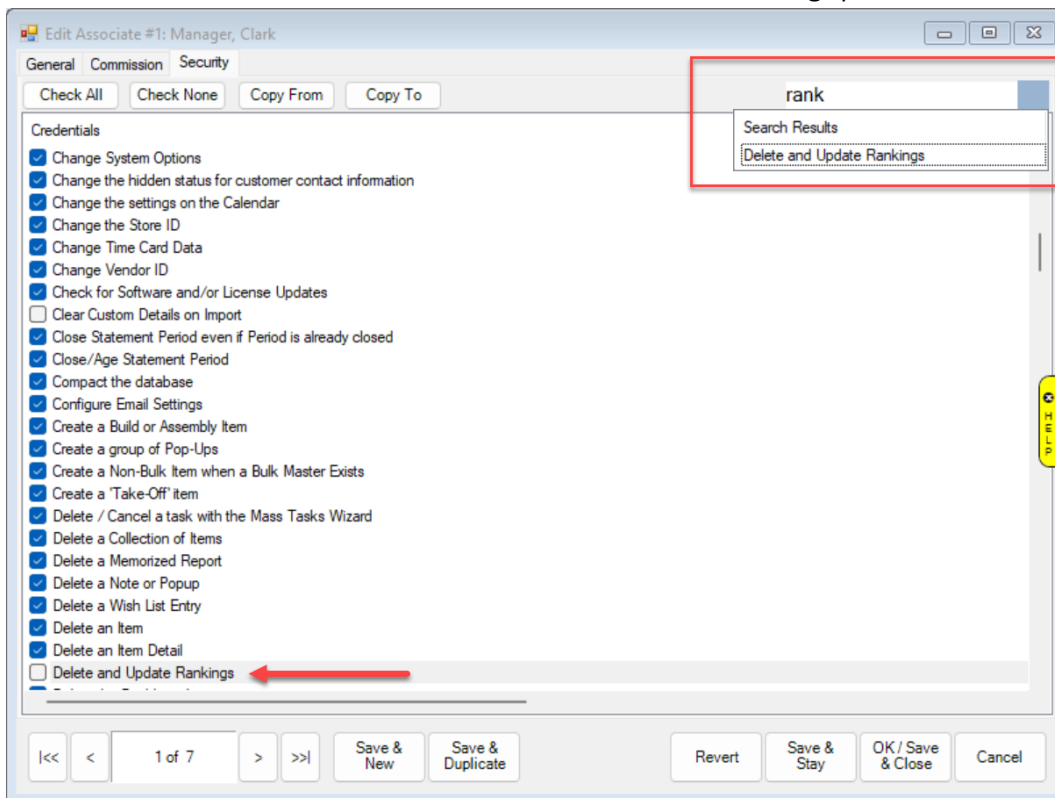
Available System Options:

Days to Include in Customer Rankings	The number of days to analyze when calculating ranking. For example, 365 would only look at the last 365 days of sales. The default is 1,095 (3 years) and the maximum is 3,652 (10 years).
Number of Customers to Rank	The number of customers to rank. The default is 200.
Show Ranks on Customer Display	This controls whether you want to display rankings. Set this to False to disable this feature.

Associate Permission

To give associates permission to Edit and Delete Customer Rankings:

1. Navigate to **Administrative > Associates > Associate List**.
2. Double click on the associate to open the **Associate Record** and click the **Security** tab.
3. Use the **search bar** and search **Rank** to locate the **Customer Rankings** permission.



4. Check the box for **Delete and Update Rankings**, then select a **Save** option to apply your changes.

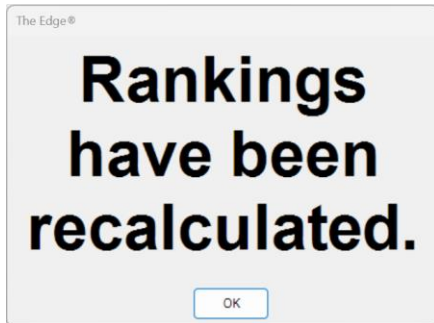
Using Customer Ranking

Rankings are calculated **once per day automatically**, but you can **manually** recalculate them at any time. You may also choose to **delete** all **existing Customer Rankings** and start fresh.

Manual Recalculation

To **manually recalculate** Customer Ranking:

1. Navigate to **Administrative > Advanced Settings > Rankings > Calculate Rankings**.
2. Enter **ID/Password** to recalculate.
3. You will see a pop-up **confirming** rankings have been **recalculated**:



Delete Rankings

To **delete** all Customer Rankings:

1. Navigate to **Administrative > Advanced Settings > Rankings > Delete Rankings**.
2. Enter **ID/Password** to delete.
3. You will see a pop-up **confirming** rankings have been **deleted**:

