

RFM Report

Introduction

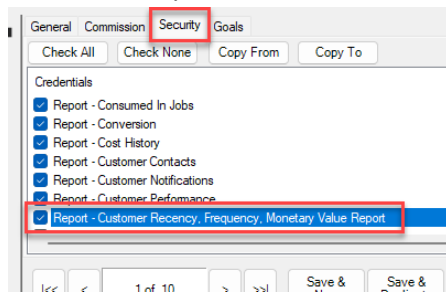
A new **Customer** report was added called the **RFM (Recency, Frequency, and Monetary Value) report** that was developed to increase your marketing potential by allowing you to search for customers within a specific time period, return detailed information for that time, and export that information from Edge.

Reportable data includes **Customer Contact** information (including **Social** address), **Total Purchase** and **Total Transaction** for the period, **Last Transaction** and **Last Purchase** dates, **Lifetime #** and **Lifetime amount** of transactions, **# of** and **\$ amount** of **Transactions for Last 90 Days**, and **more**.

Running the RFM Report

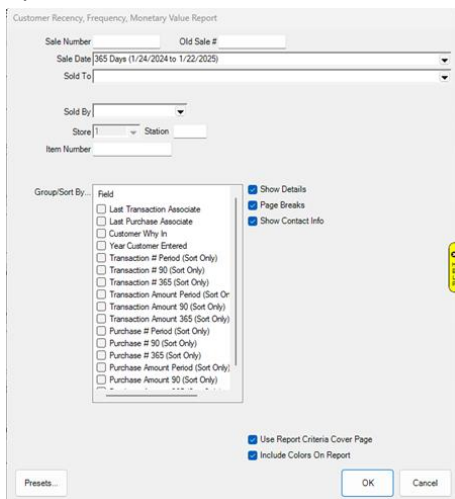
As with other reports, you must make sure you have the appropriate **permission** set prior to running it otherwise Edge will alert you with a **pop-up** letting you know you do not have permission to run the report.

Visit the **Security** tab on the Associate record that should have permission to run this report, and either search or scroll until you find the **Customer Recency, Frequency, Monetary Value Report** permission.



To run the **RFM Report**:

1. Navigate to **Reports > Customers > RFM**. The **Recency, Frequency, Monetary Value Report** window will open.



2. Enter any **report criteria** at the top, then select how you would like your results to be grouped by checking the desired boxes in the **Group/Sort By** field.
3. Click **OK** to generate your report.

Customer Recency, Frequency, Monetary Value Report

2/3/2025
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365 Days (2/5/2024 to 2/3/2025); Store #: 1; Other Selected Options: Show Details, Show Contact Info; Sort By: Last Transaction Associate, Last Purchase Associate, Customer Why In, Year Customer Entered, Transaction # Period (Sort Only);

Customer	Transaction #			Transaction \$			Purchase #			Purchase \$			
	Period	90	365	Period	90	365	Period	90	365	Period	90	365	
Address		Last Transaction Date			Last Transaction Associate			Last Purchase Date			Last Purch. Assoc.		
Phone		Email			Social			Date Entered			Last Amt		
(001-00012)	1	1	1	\$106	\$106	\$106	1	1	1	\$100	\$100	\$100	
	11/20/2024		(22)				11/20/2024		(22)			\$100	
												12/16/2021	
(001-00029)	2	1	2	\$570	\$570	\$570	2	2	2	\$418	\$418	\$418	
	12/12/2024		(22)				12/12/2024		(22)			\$183	
							@strange@things.c					8/24/2022	
(001-00039)	40	40	40	\$27,151	\$27,151	\$27,151	28	28	28	\$22,630	\$22,630	\$22,630	
	1/27/2025		(22)				1/27/2025		(22)			\$11,275	
							https://www.facebook.com/					11/18/2024	
(001-00018)	1	0	1	\$62	\$0	\$62	0	0	0	\$0	\$0	\$0	
	10/17/2024		(3) Assoc Three						(3) Assoc Three			\$0	
							@britscan.com					3/29/2022	
(001-00021)	1	0	1	\$58	\$0	\$58	1	0	1	\$41	\$0	\$41	
	10/17/2024		(3) Assoc Three				10/17/2024		(3) Assoc Three			\$41	
							@trinityfict.ccc					4/5/2022	
Grand Totals	45	42	45	\$27,947	\$27,827	\$27,947	32	31	32	\$23,189	\$23,148	\$23,189	