Customers by Recent Sale

Product Development - 2025-07-01 - Major Features

Description

The Customers by Recent Sale screen is an analytical tool designed to monitor customer engagement by tracking the time since their last invoice. This screen categorizes customers into four distinct statuses based on the duration since their last transaction, helping businesses identify engagement levels and potential risks in customer retention.

The statuses (Recent, Stale, At Risk, and Churned) are defined here.

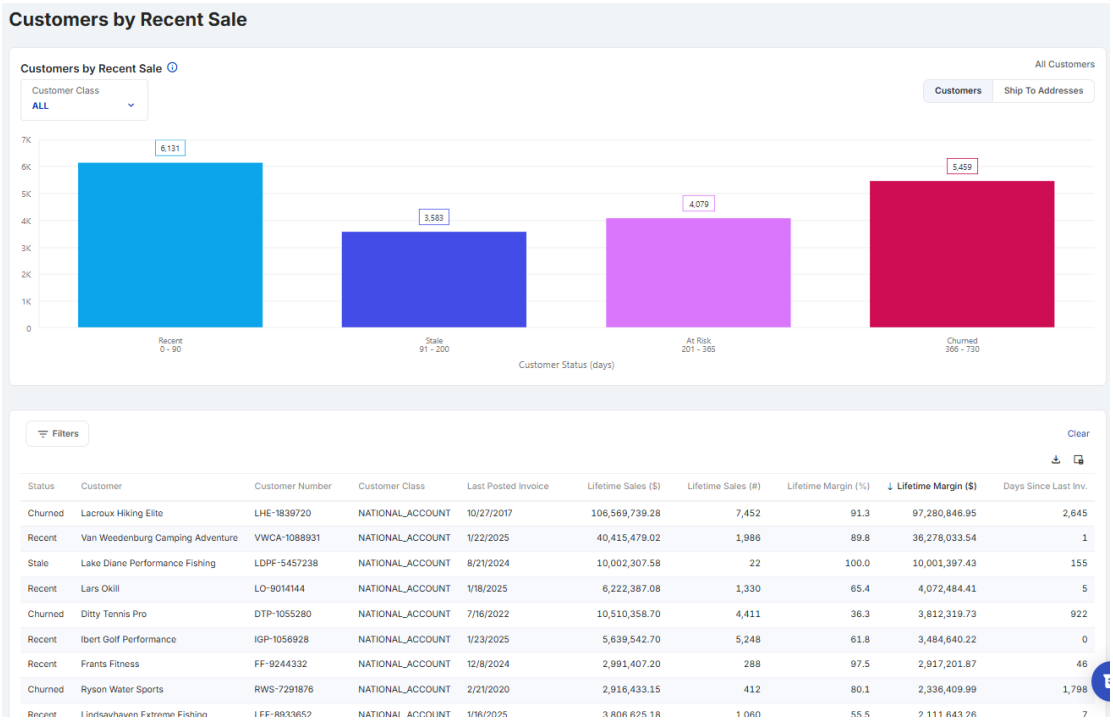
Each status is visually represented, allowing users to quickly assess the health of customer relationships and prioritize follow-up actions. The screen supports click-through functionality, enabling users to delve deeper into specific customer data to understand individual behavior patterns and potentially devise personalized strategies to re-engage them. This targeted approach is crucial for improving customer retention and preventing churn.

The Customers by Recent Sale widget also supports a Ship To Address mode. When Customers by Recent Sale is in **Ship To Address mode**, the customer data presented will reflect unique combinations of **Customer + Ship To Code**. If you have a customer called ABC with Ship To Codes corresponding to Location 1, Location 2, Location 3, etc., they will be treated independently in the Customers by Recent Sale results, each presented with the composite customer name "Customer Name: <ship to code>".

Now, a user could quickly identify that ABC Location 1 has bought recently while Location 3 has not and act accordingly.

Please note that this feature uses the Ship To Code assigned at the Sales Line Item level.

Chart



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Visual Elements

- 4 bars, each representing the count of customers with that respective status.
- A **Customer Class dropdown** filter allows the customer to filter the data to only customers with the specified Customer Class.
    - Default Value: All
- A **mode selector** allows the user to choose whether the widget bases its results on standard Customer records or each unique Customer + Ship To Code combination.

Statuses

