



Member search by spending trend

Go to Member > Member Record > Spending Trend

Users can search for members using their spending trends across different time periods as a criteria. Spending trend includes both uptrend and downtrend.

Member spending trend search results				Member spending trend search results			
1-Mar-2019 to 31-Mar-2019				1-Apr-2019 to 30-Apr-2019			
Member code	Member name	Cumulative billing	Cumulative payment	Member code	Member name	Cumulative billing	Cumulative payment
WeM-00001	Mary Ho	\$ 5,000.00	\$ 5,000.00	WeM-00001	Mary Ho	\$ 11,600.00	\$ 11,600.00
WeM-00002	Man Kin San Ray	\$ 12,900.00	\$ 12,900.00	WeM-00002	Man Kin San Ray	\$ 20,000.00	\$ 20,000.00
WeM-00004	Cobi	\$ 3,000.00	\$ 3,000.00	WeM-00004	Cobi	\$ 13,000.00	\$ 13,000.00
		\$ 21,900.00	\$ 21,900.00			\$ 49,600.00	\$ 49,600.00

The table above is a list of members with an increasing spending trend from Mar 2019 to Apr 2019.

By spending trend search member

Member join shop: All, CWB, MK

Member group: All, New Member, VIP Silver, VIP Gold, VIP Platinum, Group Buying

Cumulative invoice amount: >=

Cumulative payment amount: >=

Default consultant: All, CWB, MK, Sales, Sales Manager, Sales Trainee, Amy (S007), Anna (S004), cobi ng (MK001), Gary (S002), Ivy Lee (beauty)

Include or exclude item: Include item to or

Invoice date 1: From 1 / Mar / 2019 to 31 / Mar / 2019 Last month

Invoice date 2: From 1 / Apr / 2019 to 30 / Apr / 2019 Last month

Invoice date 3: From -- / -- / to -- / -- / Clear selection

Submit Reset

Users can make use of the following criteria:

1. Member shop
2. Member group
3. Cumulative invoice / payment amount
4. Consultant
5. Items included / not included to filter member search results.

Users can select a spending uptrend, downtrend, or no change in spending. Invoice amount can be selected for comparison instead of payment amount.

The member search by spending trend function can also be used to compare member spending over 3 time periods.

Member spending trend search results				Member spending trend search results				Member spending trend search results			
1-Feb-2019 to 28-Feb-2019				1-Mar-2019 to 31-Mar-2019				1-Apr-2019 to 30-Apr-2019			
Member code	Member name	Cumulative billing	Cumulative payment	Member code	Member name	Cumulative billing	Cumulative payment	Member code	Member name	Cumulative billing	Cumulative payment
WeM-00001	Mary Ho	\$ 900.00	\$ 900.00	WeM-00001	Mary Ho	\$ 5,000.00	\$ 5,000.00	WeM-00001	Mary Ho	\$ 11,600.00	\$ 11,600.00
WeM-00002	Man Kin San Ray	\$ 0.00	\$ 0.00	WeM-00002	Man Kin San Ray	\$ 12,900.00	\$ 12,900.00	WeM-00002	Man Kin San Ray	\$ 20,000.00	\$ 20,000.00
WeM-00004	Cobi	\$ 1,000.00	\$ 1,000.00	WeM-00004	Cobi	\$ 3,000.00	\$ 3,000.00	WeM-00004	Cobi	\$ 13,000.00	\$ 13,000.00
		\$ 2,500.00	\$ 2,500.00			\$ 21,900.00	\$ 21,900.00			\$ 49,600.00	\$ 49,600.00

The table above is a list of members with an increasing spending trend through Feb 2019, Mar 2019 and Apr 2019.