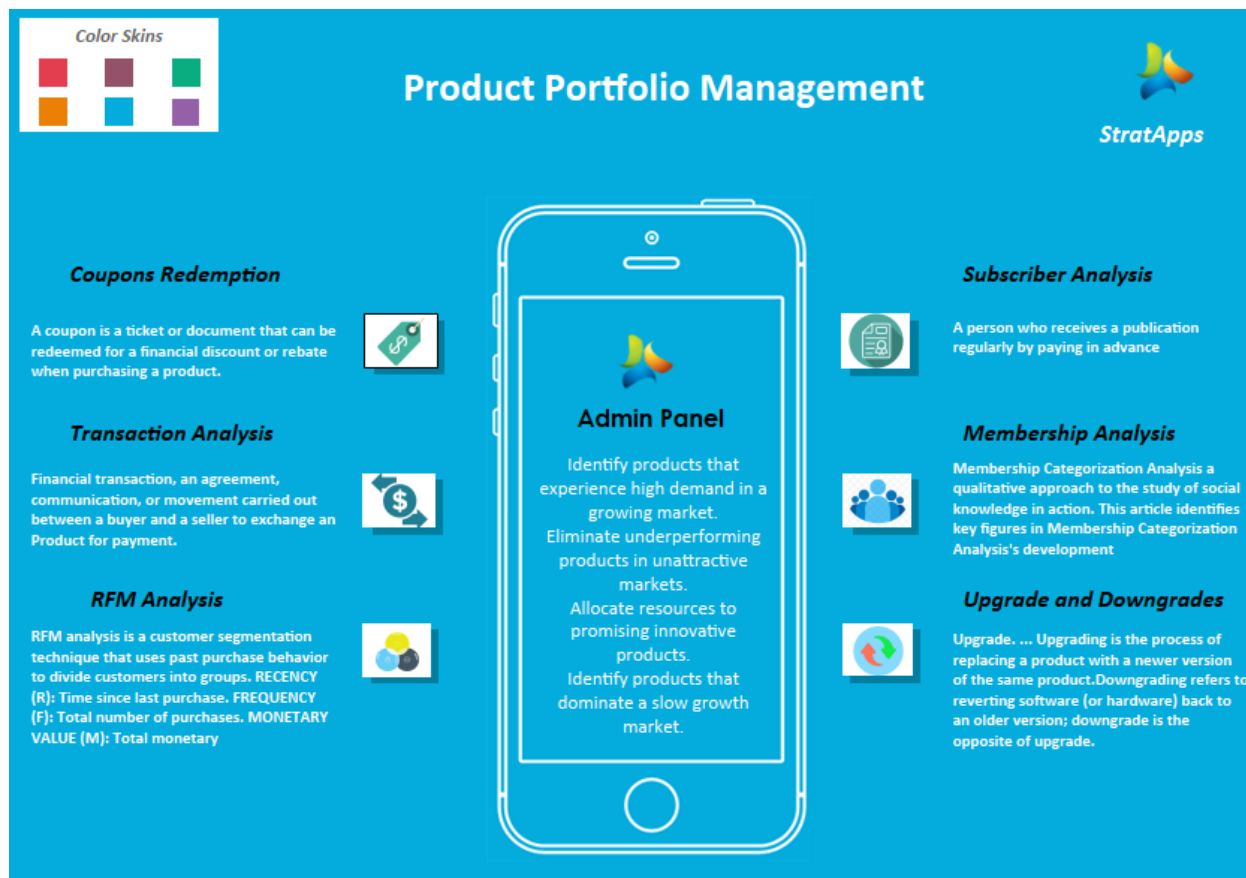# Product Portfolio Management

Home Page:

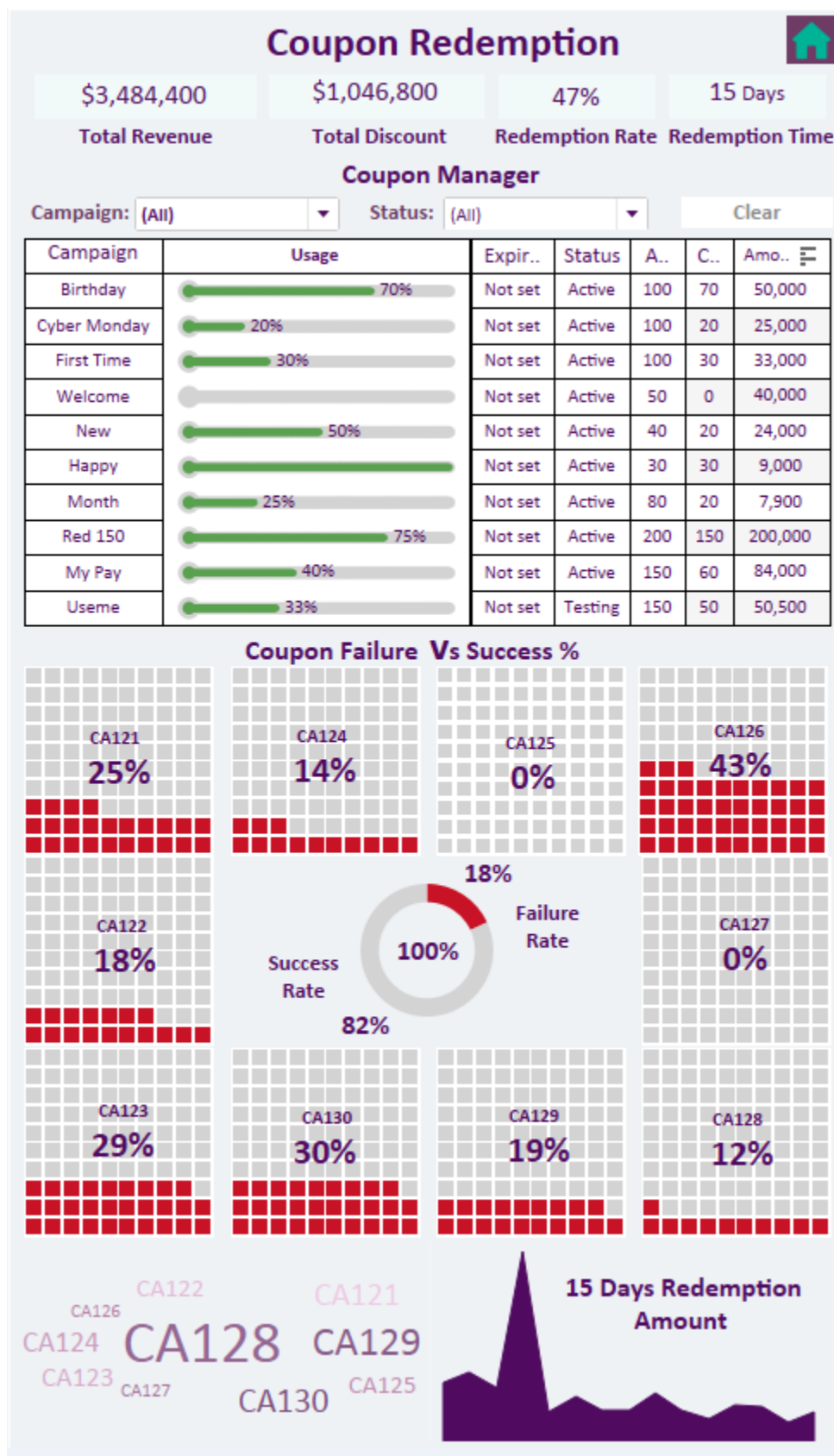To Home Page, choose one of the following Icons.



To identify products that experience high demand in a growing market. Eliminate underperforming products in unattractive markets. Allocate resources to promising innovative products. Identify products that dominate a slow growth market.

**Coupon Redemption:** **C**oupon is a ticket or document that can be redeemed for a financial discount or rebate when purchasing a product.

Customarily, coupons are issued by manufacturers of consumer packaged goods or by retailers, to be used in retail stores as a part of sales promotions. You can restrict coupon redemptions by customer, time, or order configurable redemption limits (such as redemption limit per coupon code, redemption limit per customer or redemption limit per time frame). If the customer provides a coupon code that has not reached its redemption limits, the customer qualifies for any promotion associated with that coupon. Since only price conscious consumers are likely to spend the time to claim the savings, coupons function as a form of price discrimination, enabling retailers to offer a lower price only to those consumers who would otherwise go elsewhere. In addition, coupons can also be targeted selectively to regional markets in which price competition is great.

Coupon Redemption view explains details of coupons and there success failure rating , if you want to see the further details of that particular coupon used customer details then click on the filled bars.

# Coupon Redemption

| $3,484,400 | $1,046,800 | 47% | 15 Days |
|---|---|---|---|
| **Total Revenue** | **Total Discount** | **Redemption Rate** | **Redemption Time** |

## Coupon Manager

Campaign: (All) ▼    Status: (All) ▼    Clear

| Campaign | Usage | Expir.. | Status | A.. | C.. | Amo.. |
|---|---|---|---|---|---|---|
| Birthday | 70% | Not set | Active | 100 | 70 | 50,000 |
| Cyber Monday | 20% | Not set | Active | 100 | 20 | 25,000 |
| First Time | 30% | Not set | Active | 100 | 30 | 33,000 |
| Welcome | | Not set | Active | 50 | 0 | 40,000 |
| New | 50% | Not set | Active | 40 | 20 | 24,000 |
| Happy | | Not set | Active | 30 | 30 | 9,000 |
| Month | 25% | Not set | Active | 80 | 20 | 7,900 |
| Red 150 | 75% | Not set | Active | 200 | 150 | 200,000 |
| My Pay | 40% | Not set | Active | 150 | 60 | 84,000 |
| Useme | 33% | Not set | Testing | 150 | 50 | 50,500 |

## Coupon Failure Vs Success %

CA121 **25%**

CA124 **14%**

CA125 **0%**

CA126 **43%**

CA122 **18%**

CA123 **29%**

CA130 **30%**

18% Failure Rate

100%

Success Rate

82%

CA129 **19%**

CA127 **0%**

CA128 **12%**

CA122  CA121  CA126  CA124  **CA128**  CA129  CA123  CA127  CA130  CA125

**15 Days Redemption Amount**

You can restrict coupon redemptions by customer, time, or order configurable redemption limits (such as redemption limit per coupon code, redemption limit per customer or redemption limit per time frame). If the customer provides a coupon code that has not reached its redemption limits, the customer qualifies for any promotion associated with that coupon.

This Detailed Report Explain the details of that Particular Coupon used customers with the Redeemed value.

### Detail Report

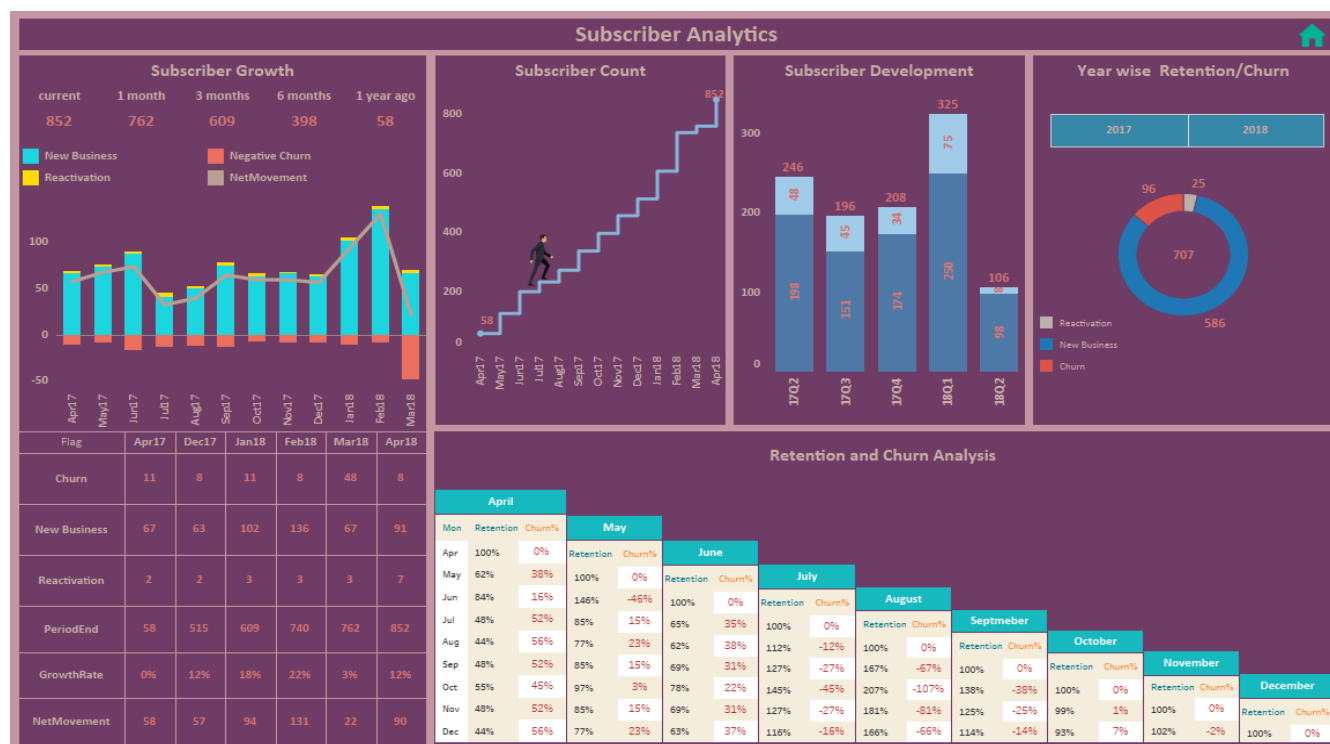| Campaign | Coupon code | Date | Customer ID | Redemed Value |
|---|---|---|---|---|
| Birthday | CA121 | March 3,2019 | CA 30187033 | 500 |
| Birthday | CA121 | March 3,2019 | CA 30187047 | 500 |
| Birthday | CA121 | March 3,2019 | CA 30187237 | 500 |
| Birthday | CA121 | March 4,2019 | CA 30187222 | 500 |
| Birthday | CA121 | March 4,2019 | CA 30187223 | 500 |
| Birthday | CA121 | March 4,2019 | CA 30187225 | 500 |
| Birthday | CA121 | March 4,2019 | CA 30187231 | 500 |
| Birthday | CA121 | March 4,2019 | CA 30187232 | 500 |
| Birthday | CA121 | March 4,2019 | CA 30187233 | 500 |
| Birthday | CA121 | March 4,2019 | CA 30187235 | 500 |
| Birthday | CA121 | March 4,2019 | CA 30187236 | 500 |
| Birthday | CA121 | March 4,2019 | CA 30187238 | 500 |
| Birthday | CA121 | March 4,2019 | CA 30187239 | 500 |
| Birthday | CA121 | March 4,2019 | CA 30187240 | 500 |
| Birthday | CA121 | March 4,2019 | CA 30187242 | 500 |
| Birthday | CA121 | March 4,2019 | CA 30187243 | 500 |
| Birthday | CA121 | March 4,2019 | CA 30187244 | 500 |
| Birthday | CA121 | March 4,2019 | CA 30187245 | 500 |
| Birthday | CA121 | March 4,2019 | CA 30187246 | 500 |
| Birthday | CA121 | March 4,2019 | CA 30187247 | 500 |
| | | | Grand Total | 523,400 |

Page No 2 < >

The **Subscribers Report** calculates the total number of active accounts and subscribers over a selected time period. The **Subscriber Growth Report** calculates the number of new subscribers, returning subscribers and churned subscribers and the Net positive or negative change over a selected time period.

The **Subscriber Retention Report** is a cohort analysis looking at retention (and churn) over time for each group of paying subscribers that signed up in a given month.

The **Churn Analysis Report** calculates the total number of subscriptions that have expired during a selected time period, sectioned by expiration reason. Each expiration reason is categorized into one of two types of churn: Voluntary or Involuntary.

If you want to drill down the further details then click on the Reports.

## Subscriber Analytics

### Subscriber Growth

| | current | 1 month | 3 months | 6 months | 1 year ago |
|---|---|---|---|---|---|
| | 852 | 762 | 609 | 398 | 58 |

- New Business
- Reactivation
- Negative Churn
- NetMovement

| Flag | Apr17 | Dec17 | Jan18 | Feb18 | Mar18 | Apr18 |
|---|---|---|---|---|---|---|
| Churn | 11 | 8 | 11 | 8 | 48 | 8 |
| New Business | 67 | 63 | 102 | 136 | 67 | 91 |
| Reactivation | 2 | 2 | 3 | 3 | 3 | 7 |
| PeriodEnd | 58 | 515 | 609 | 740 | 762 | 852 |
| GrowthRate | 0% | 12% | 18% | 22% | 3% | 12% |
| NetMovement | 58 | 57 | 94 | 131 | 22 | 90 |

### Subscriber Count

### Subscriber Development

### Year wise Retention/Churn

| 2017 | 2018 |
|---|---|

- Reactivation
- New Business
- Churn

### Retention and Churn Analysis

| Mon | April Retention | Churn% | May Retention | Churn% | June Retention | Churn% | July Retention | Churn% | August Retention | Churn% | September Retention | Churn% | October Retention | Churn% | November Retention | Churn% | December Retention | Churn% |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Apr | 100% | 0% | | | | | | | | | | | | | | | | |
| May | 62% | 38% | 100% | 0% | | | | | | | | | | | | | | |
| Jun | 84% | 16% | 146% | -46% | 100% | 0% | | | | | | | | | | | | |
| Jul | 48% | 52% | 85% | 15% | 65% | 35% | 100% | 0% | | | | | | | | | | |
| Aug | 44% | 56% | 77% | 23% | 62% | 38% | 112% | -12% | 100% | 0% | | | | | | | | |
| Sep | 48% | 52% | 85% | 15% | 69% | 31% | 127% | -27% | 167% | -67% | 100% | 0% | | | | | | |
| Oct | 55% | 45% | 97% | 3% | 78% | 22% | 145% | -45% | 207% | -107% | 138% | -38% | 100% | 0% | | | | |
| Nov | 48% | 52% | 85% | 15% | 69% | 31% | 127% | -27% | 181% | -81% | 125% | -25% | 99% | 1% | 100% | 0% | | |
| Dec | 44% | 56% | 77% | 23% | 63% | 37% | 116% | -16% | 166% | -66% | 114% | -14% | 93% | 7% | 102% | -2% | 100% | 0% |

In this detailed report explain all the Subscriber details.

## Detail Report

| Customer Name | Date | |
|---|---|---|
| Annomyous | 2/1/2018 | Reactivation |
| Annomyous | 2/1/2018 | Reactivation |
| Annomyous | 2/1/2018 | Reactivation |
| Ankitha | 2/1/2018 | Churn |
| Rohan | 2/1/2018 | Churn |
| Prathyusha | 2/1/2018 | Churn |
| Sandeepthi | 2/1/2018 | Churn |
| Sravani | 2/1/2018 | Churn |
| Sravya | 2/1/2018 | Churn |
| Sangeetha | 2/1/2018 | Churn |
| Bhushan | 2/1/2018 | Churn |
| Sai Krishna | 2/1/2018 | New Business |
| Siva Krishna | 2/1/2018 | New Business |
| Kanna | 2/1/2018 | New Business |
| Keshavi | 2/1/2018 | New Business |
| Priyamani | 2/1/2018 | New Business |
| Poorna | 2/1/2018 | New Business |
| Yaani | 2/1/2018 | New Business |
| Pradeep | 2/1/2018 | New Business |
| Yashoda | 2/1/2018 | New Business |
| Gowri | 2/1/2018 | New Business |

Page No 1 < >

Transaction Analysis: Financial Transaction an agreement communication or movement carried out between a buyer and a seller to exchange product for payment.

In this Transaction Report is showing in a calendar view year wise click on year.

Click on year wise it drilldown to month wise it shows the every month in that year.

**Transaction Report**

*Click to Filter*

| 2015 | 2016 | **2017** |

| Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep |

**January 2015**

| S | M | T | W | T | F | S |
|---|---|---|---|---|---|---|
|  |  |  |  | 1 | 2 | 3 |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | 28 | 29 | 30 | 31 |

**February 2015**

| S | M | T | W | T | F | S |
|---|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |

**March 2015**

| S | M | T | W | T | F | S |
|---|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | 31 |  |  |  |  |

**April 2015**

| S | M | T | W | T | F | S |
|---|---|---|---|---|---|---|
|  |  |  | 1 | 2 | 3 | 4 |
| 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 |  |  |

**May 2015**

| S | M | T | W | T | F | S |
|---|---|---|---|---|---|---|
|  |  |  |  |  | 1 | 2 |
| 3 | 4 | 5 | 6 | 7 | 8 | 9 |
| 10 | 11 | 12 | 13 | 14 | 15 | 16 |
| 17 | 18 | 19 | 20 | 21 | 22 | 23 |
| 24 | 25 | 26 | 27 | 28 | 29 | 30 |
| 31 |  |  |  |  |  |  |

**June 2015**

| S | M | T | W | T | F | S |
|---|---|---|---|---|---|---|
|  | 1 | 2 | 3 | 4 | 5 | 6 |
| 7 | 8 | 9 | 10 | 11 | 12 | 13 |
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 |  |  |  |  |

**July 2015**

| S | M | T | W | T | F | S |
|---|---|---|---|---|---|---|
|  |  |  | 1 | 2 | 3 | 4 |
| 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | 31 |  |

**August 2015**

| S | M | T | W | T | F | S |
|---|---|---|---|---|---|---|
|  |  |  |  |  |  | 1 |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 9 | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 | 24 | 25 | 26 | 27 | 28 | 29 |
| 30 | 31 |  |  |  |  |  |

**September 2015**

| S | M | T | W | T | F | S |
|---|---|---|---|---|---|---|
|  |  | 1 | 2 | 3 | 4 | 5 |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 |  |  |  |

**October 2015**

| S | M | T | W | T | F | S |
|---|---|---|---|---|---|---|
|  |  |  |  | 1 | 2 | 3 |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | 28 | 29 | 30 | 31 |

**November 2015**

| S | M | T | W | T | F | S |
|---|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 |  |  |  |  |  |

**December 2015**

| S | M | T | W | T | F | S |
|---|---|---|---|---|---|---|
|  |  | 1 | 2 | 3 | 4 | 5 |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | 31 |  |  |

Here we click on any month in that year it drilldown to day wise report in a calendar view, in this calendar view it shows the each day Paid or Hold or Decline Transactions in different colors. If we click on any day it will drilldown to detailed transaction report.
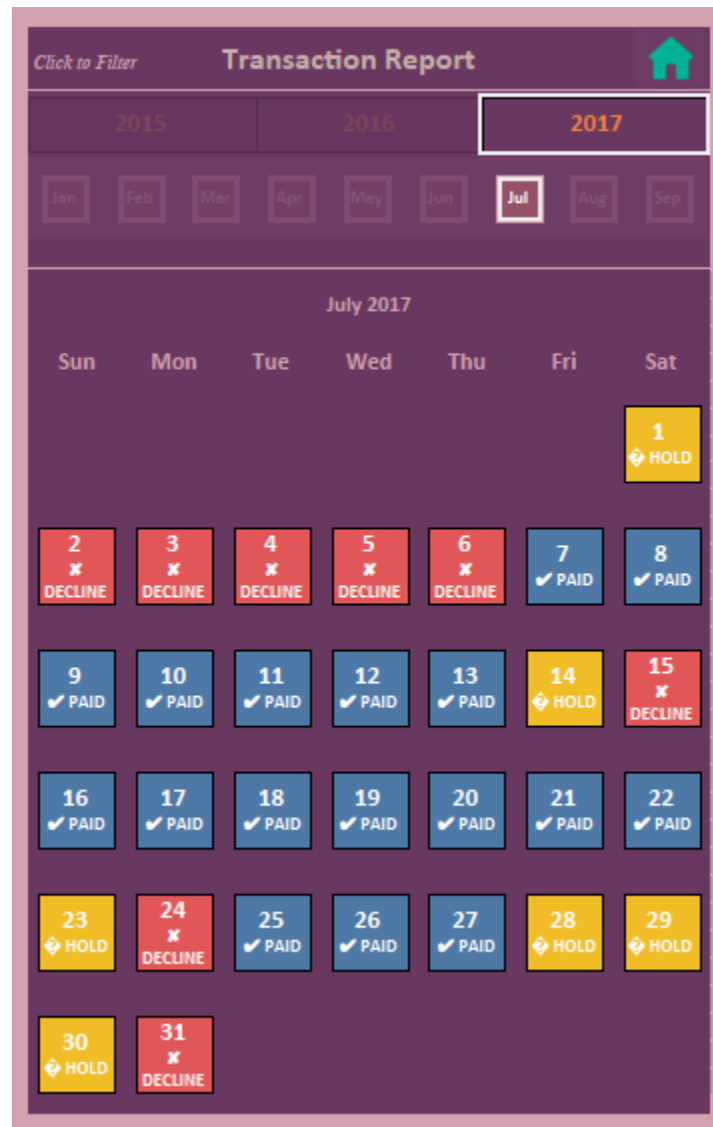
In this report shows the details of that particular transaction, and also highlighting the date in that particular month and showing the status of all the details of that particular customer.

RFM Analysis is a Customer Segmentation Technique that uses past purchase behavior to divide customers into Segments. RECENCY (R): Time since last Purchase, FREQUENCY (F): Total number of purchases, MONETARY VALUE (M): Total monetary value RFM analysis is a marketing technique used to determine quantitatively which customers are the best ones by examining how recently a customer has purchased (recency), how often they purchase (frequency), and how much the customer spends (monetary). RFM analysis is based on the marketing axiom that "80% of your business comes from 20% of your Customers". It will shows the Segment wise how many customers because we catch the lost cheap customers easily , we can hold that customers he can travel with us so that company revenue will be generated.

# RFM ANALYSIS

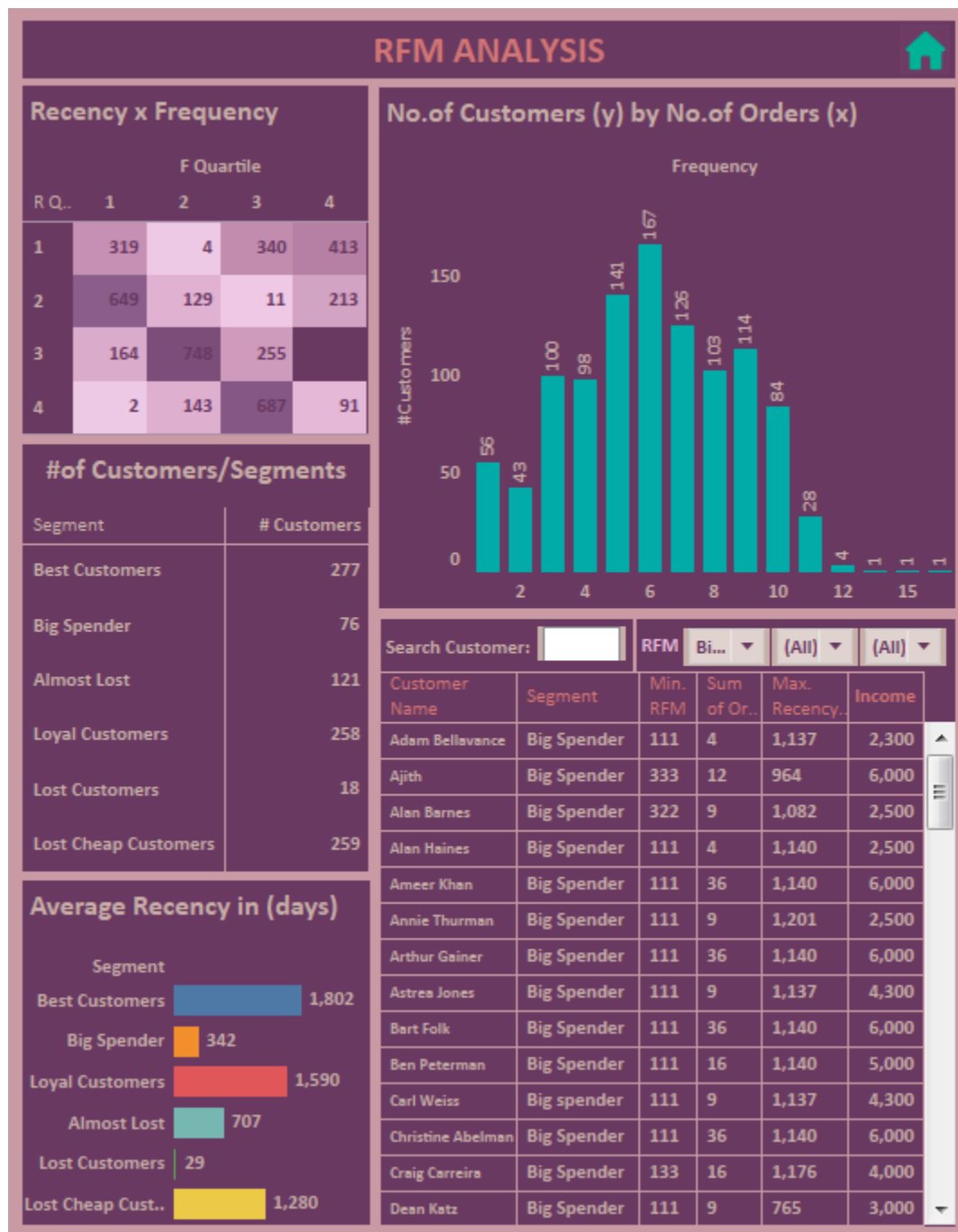## Recency x Frequency

| R Q.. | F Quartile | | | |
|---|---|---|---|---|
| | 1 | 2 | 3 | 4 |
| 1 | 319 | 4 | 340 | 413 |
| 2 | 649 | 129 | 11 | 213 |
| 3 | 164 | 748 | 255 | |
| 4 | 2 | 143 | 687 | 91 |

## #of Customers/Segments

| Segment | # Customers |
|---|---|
| Best Customers | 277 |
| Big Spender | 76 |
| Almost Lost | 121 |
| Loyal Customers | 258 |
| Lost Customers | 18 |
| Lost Cheap Customers | 259 |

## Average Recency in (days)

| Segment | |
|---|---|
| Best Customers | 1,802 |
| Big Spender | 342 |
| Loyal Customers | 1,590 |
| Almost Lost | 707 |
| Lost Customers | 29 |
| Lost Cheap Cust.. | 1,280 |

## No.of Customers (y) by No.of Orders (x)

Frequency

#Customers values: 56, 43, 100, 98, 141, 167, 126, 103, 114, 84, 28, 4, 1, 1, 1

Search Customer: [ ]  RFM  Bi... ▼  (All) ▼  (All) ▼

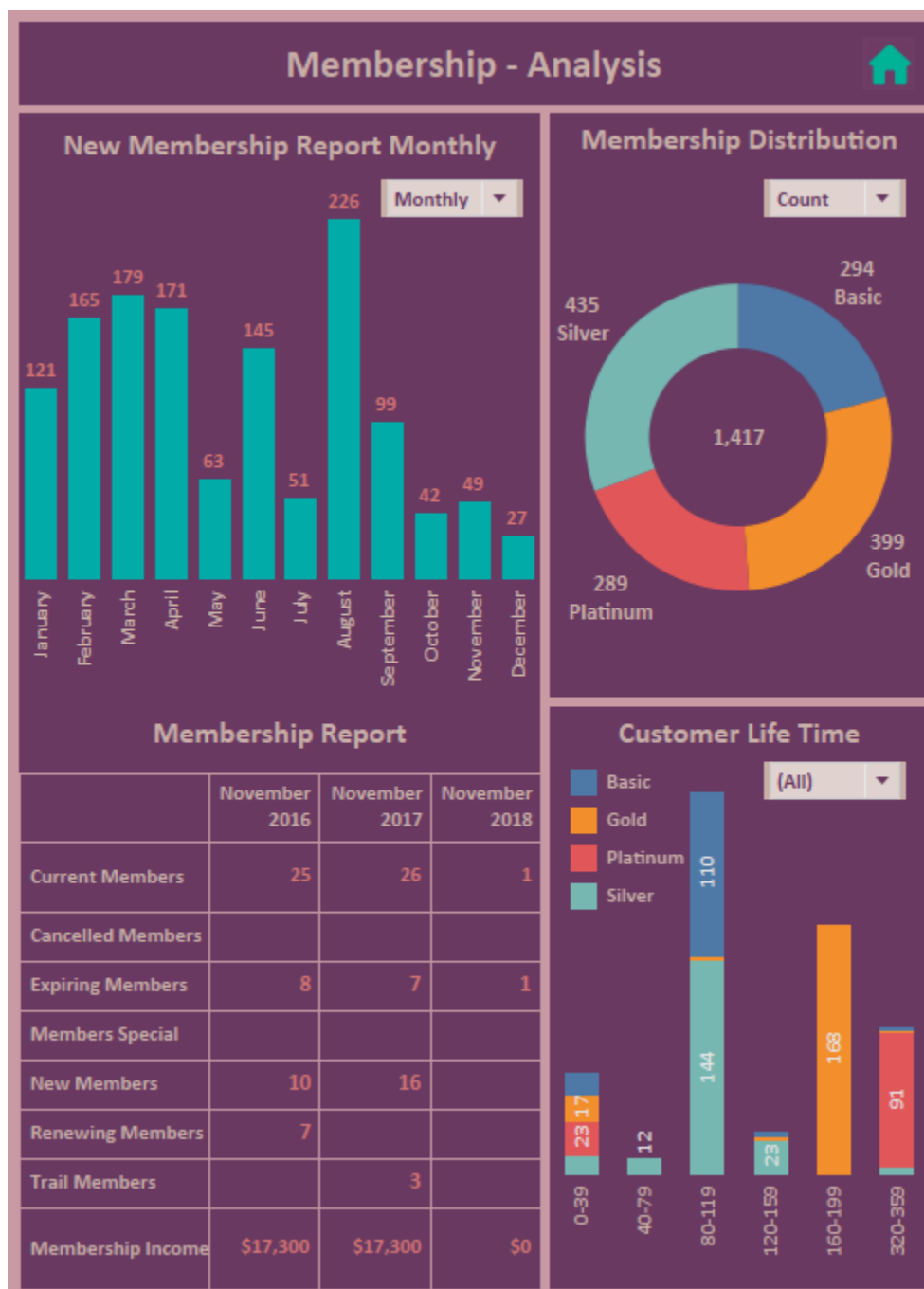| Customer Name | Segment | Min. RFM | Sum of Or.. | Max. Recency.. | Income |
|---|---|---|---|---|---|
| Adam Bellavance | Big Spender | 111 | 4 | 1,137 | 2,300 |
| Ajith | Big Spender | 333 | 12 | 964 | 6,000 |
| Alan Barnes | Big Spender | 322 | 9 | 1,082 | 2,500 |
| Alan Haines | Big Spender | 111 | 4 | 1,140 | 2,500 |
| Ameer Khan | Big Spender | 111 | 36 | 1,140 | 6,000 |
| Annie Thurman | Big Spender | 111 | 9 | 1,201 | 2,500 |
| Arthur Gainer | Big Spender | 111 | 36 | 1,140 | 6,000 |
| Astrea Jones | Big Spender | 111 | 9 | 1,137 | 4,300 |
| Bart Folk | Big Spender | 111 | 36 | 1,140 | 6,000 |
| Ben Peterman | Big Spender | 111 | 16 | 1,140 | 5,000 |
| Carl Weiss | Big spender | 111 | 9 | 1,137 | 4,300 |
| Christine Abelman | Big Spender | 111 | 36 | 1,140 | 6,000 |
| Craig Carreira | Big Spender | 133 | 16 | 1,176 | 4,000 |
| Dean Katz | Big Spender | 111 | 9 | 765 | 3,000 |

In this Detailed Report shows all the Order wise details of the members and Income of the member,  we have further drilldown here we can click on the order in tooltip we have  an option Order View details.

## Detailed Report

| Cus.. | Customer N.. | Plan | Plan Id | Stages | Segment | Mi.. | Ma.. | Start Date | End Date | Orders | #Custom.. | Number .. | Income |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| CA .. | Alan Schoenb.. | Silver | SL 8878 | Renewing | Loyal Cus.. | 433 | 584 | 9/25/2017 | 12/25/20.. | 6 | 1 | 1 | 500 |
| CA 3 0187 195 | Henry Goldwyn | Basic | BA 2210 | Active | Loyal Cus.. | 322 | 1,0.. | 5/5/2016 | 8/5/2016 | 6 | 1 | 1 | 300 |
| | | | | Renewing | Loyal Cus.. | 422 | 990 | 8/15/2016 | 11/15/20.. | 6 | 1 | 1 | 300 |
| | | Silver | SL 8878 | Active | Loyal Cus.. | 133 | 888 | 11/25/20.. | 2/25/2017 | 6 | 1 | 1 | 500 |
| | | | | Renewing | Loyal Customers | 244 | 788 | 3/5/2017 | 6/5/2017 | 6 | 1 | 1 | 500 |
| | | | | | | 322 | 686 | 6/15/2017 | 9/15/2017 | 6 | 1 | 1 | 500 |
| | | | | | | 433 | 584 | 9/25/2017 | 12/25/20.. | 6 | 1 | 1 | 500 |
| CA 3 0187 196 | Corey Roper | Basic | BA 2210 | Active | Loyal Cus.. | 322 | 1,0.. | 5/5/2016 | 8/5/2016 | 6 | 1 | 1 | 300 |
| | | | | Renewing | Loyal Cus.. | 422 | 990 | 8/15/2016 | 11/15/20.. | 6 | 1 | 1 | 300 |
| | | Silver | SL 8878 | Active | Loyal Cus.. | 133 | 888 | 11/25/20.. | 2/25/2017 | 6 | 1 | 1 | 500 |
| | | | | Renewing | Loyal Customers | 244 | 788 | 3/5/2017 | 6/5/2017 | 6 | 1 | 1 | 500 |
| | | | | | | 322 | 686 | 6/15/2017 | 9/15/2017 | 6 | 1 | 1 | 500 |
| | | | | | | 433 | 584 | 9/25/2017 | 12/25/20.. | 6 | 1 | 1 | 500 |
| CA 3 0187 197 | Shahid Hopkins | Basic | BA 2210 | Active | Loyal Cus.. | 322 | 1,0.. | 5/5/2016 | 8/5/2016 | 6 | 1 | 1 | 300 |
| | | | | Renewing | Loyal Cus.. | 422 | 990 | 8/15/2016 | 11/15/20.. | 6 | 1 | 1 | 300 |
| | | Silver | SL 8878 | Active | Loyal Cus.. | 133 | 888 | 11/25/20.. | 2/25/2017 | 6 | 1 | 1 | 500 |
| | | | | Renewing | Loyal Customers | 244 | 788 | 3/5/2017 | 6/5/2017 | 6 | 1 | 1 | 500 |
| | | | | | | 322 | 686 | 6/15/2017 | 9/15/2017 | 6 | 1 | 1 | 500 |
| | | | | | | 433 | 584 | 9/25/2017 | 12/25/20.. | 6 | 1 | 1 | 500 |
| CA .. | Andy Gerbode | Basic | BA 2210 | Active | Loyal Cus.. | 322 | 1,0.. | 5/5/2016 | 8/5/2016 | 6 | 1 | 1 | 300 |
| | | | | | | | | | Grand Total | | 167 | 834 | 458,300 |

Page No  10  < >

In this Report shows all the Order details of the member.

**Order Detailed Report**

| | |
|---|---|
| Order ID | OD24624 |
| Customer ID | CA 30187195 |
| Customer Name | Henry Goldwyn |
| Plan Id | SL 8878 |
| Plan | Silver |
| Segment | Loyal Customers |
| Stages | Renewing |
| Start Date | 6/15/2017 |
| End Date | 9/15/2017 |
| RFM | 322 |

Membership Analysis is showing Year wise, Quarter wise, Month wise and Day wise how many subscriptions subscribe the plans (Basic, Silver, Gold, Platinum). Membership Distribution analysis describe the plan wise how many members and Income of that members and it shows the Current members ,Cancelled members, Expiring members, some are Complimentary ,Renewing members, Trail members and Income of that particular month. The Life time of that Customer show the how many members subscribe the plan wise.



Membership - Analysis

New Membership Report Monthly

Membership Distribution

Customer Life Time

Membership Report

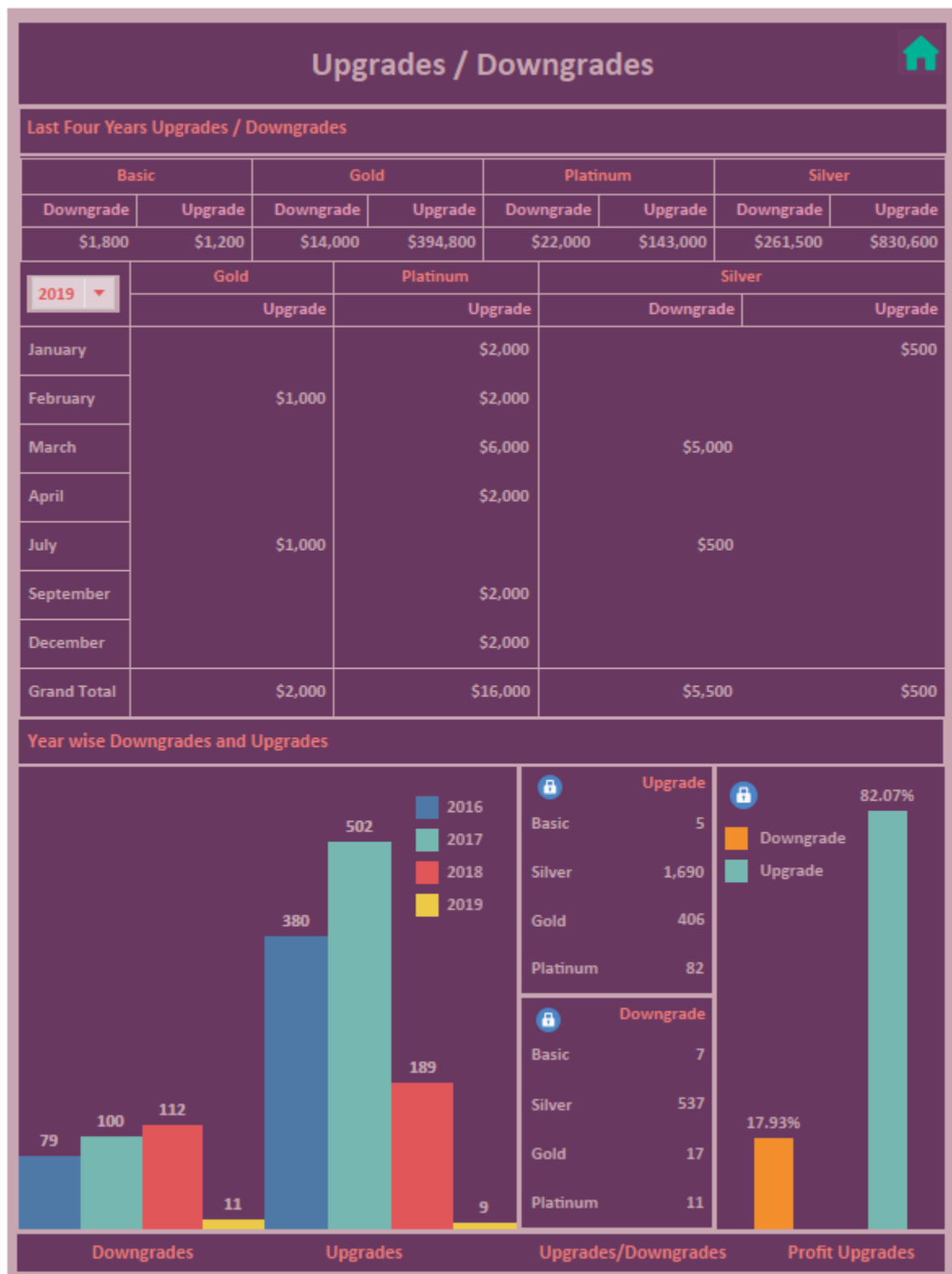| | November 2016 | November 2017 | November 2018 |
|---|---|---|---|
| Current Members | 25 | 26 | 1 |
| Cancelled Members | | | |
| Expiring Members | 8 | 7 | 1 |
| Members Special | | | |
| New Members | 10 | 16 | |
| Renewing Members | 7 | | |
| Trail Members | | 3 | |
| Membership Income | $17,300 | $17,300 | $0 |

This Detailed Report Shows all the details of a Membership Analysis

## Membership Detailed Report

| Customer ID | Customer Name | Start Date | End Date | Last Date | C: Stages | Plan | # Customers | Income |
|---|---|---|---|---|---|---|---|---|
| CA 30187266 | Sanjit Chand | 8/11/2017 | 8/11/2017 | 8/11/2017 | Expiring Members | Platin.. | 1 | $0 |
| CA 30187269 | Tanja Norvell | 8/1/2016 | 11/1/2016 | 11/11/2016 | New Members | Silver | 1 | $500 |
| CA 30187270 | Joni Sundaresam | 8/1/2016 | 11/1/2016 | 11/11/2016 | New Members | Silver | 1 | $500 |
| CA 30187277 | John Grady | 8/21/2016 | 8/21/2017 | 9/1/2017 | New Members | Platin.. | 1 | $2,000 |
| CA 30187278 | Xylona Preis | 8/21/2016 | 8/21/2017 | 9/1/2017 | New Members | Platin.. | 1 | $2,000 |
| CA 30187280 | Michelle Tran | 8/21/2016 | 8/21/2017 | 9/1/2017 | New Members | Platin.. | 1 | $2,000 |
| CA 30187284 | Sonia Sunley | 8/21/2016 | 8/21/2017 | 9/1/2017 | New Members | Platin.. | 1 | $2,000 |
| CA 30187285 | Rose O'Brian | 8/21/2016 | 8/21/2017 | 9/1/2017 | New Members | Platin.. | 1 | $2,000 |
| CA 30187293 | Yash | 8/1/2017 | 2/1/2018 | 2/11/2018 | New Members | Gold | 1 | $1,000 |
| CA 30187294 | Maxwell Schwartz | 8/1/2017 | 2/1/2018 | 2/11/2018 | New Members | Gold | 1 | $1,000 |
| Grand Total | | | | | | | 233 | $192,200 |

Page No 7 < >

Upgrades and Downgrades Report show the Last Four Years of overall income of that particular plan like(Basic, Silver, Gold, Platinum).

We have a filter option show the month wise income of that particular year.

## Upgrades / Downgrades

### Last Four Years Upgrades / Downgrades

| Basic | | Gold | | Platinum | | Silver | |
|---|---|---|---|---|---|---|---|
| Downgrade | Upgrade | Downgrade | Upgrade | Downgrade | Upgrade | Downgrade | Upgrade |
| $1,800 | $1,200 | $14,000 | $394,800 | $22,000 | $143,000 | $261,500 | $830,600 |

| 2019 ▼ | Gold | Platinum | Silver | |
|---|---|---|---|---|
| | Upgrade | Upgrade | Downgrade | Upgrade |
| January | | $2,000 | | $500 |
| February | $1,000 | $2,000 | | |
| March | | $6,000 | $5,000 | |
| April | | $2,000 | | |
| July | $1,000 | | $500 | |
| September | | $2,000 | | |
| December | | $2,000 | | |
| Grand Total | $2,000 | $16,000 | $5,500 | $500 |

### Year wise Downgrades and Upgrades

In this Detailed report shows all the details of the Upgrades and Downgrades of the customers.

## View in Detail

| Customer ID | Customer Name | Segment | Upgrades | #Custome.. | Income |
|---|---|---|---|---|---|
| CA 30187004 | Brosina Hoffman | Almost Lost | Upgrade | 1 | 500 |
| CA 30187006 | Irene Maddox | Almost Lost | Upgrade | 1 | 1,000 |
| CA 30187007 | Harold Pawlan | Lost Cheap Customers | Upgrade | 1 | 1,000 |
| CA 30187008 | Pete Kriz | Almost Lost | Upgrade | 1 | 2,000 |
| CA 30187011 | Ken Black | Big Spender | Upgrade | 1 | 2,000 |
| CA 30187013 | Emily Burns | Best Customers | Upgrade | 1 | 500 |
| CA 30187014 | Eric Hoffmann | Almost Lost | Upgrade | 1 | 2,000 |
| CA 30187016 | Matt Abelman | Almost Lost | Upgrade | 1 | 2,000 |
| CA 30187022 | Stevesmith | Best Customers | Upgrade | 1 | 2,000 |
| CA 30187023 | Patrick O'Donnell | Lost Cheap Customers | Upgrade | 1 | 2,000 |
| | | | Grand Total | 502 | 755,800 |

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