Moffice CRM Customer Ratings

Introduction

A popular theory in business, Pareto's Principle, suggests that 80% of a business' revenue comes from 20% of the customer base. For company owners, this means that segregating and understanding customers is essential to ensuring the retention and growth of revenue. Customer ratings in Moffice CRM help segregate customers through selected conditions. This way, you can prioritize the most lucrative customers for your business and gain further insights into customer spending habits and tendencies. Ultimately, you can gain more revenue and satisfy a greater amount of customers.

There are two steps to utilizing ratings in Moffice CRM. You need to first set up rating levels, conditions, and point distributions. Afterward, you can apply the settings to your current customers and view their ratings and points. Each time you edit and reapply ratings onward will add to Rating History so you can see how your relationship with a customer has changed over time.

Creating Ratings

To start using ratings, you'll need to set up grades, conditions, and points first. Initially, we start by creating rank grades. Moffice CRM already has some rating grades input for you, visible when you go to Customization > Rating Settings > Ratings.

To edit a rating's name or score, click the pencil icon next to its name in the left column. To add a new rating grade, click the + plus button on the upper right-hand corner of the Set Rating module on the right-hand side. The score for each rating is the minimum score for that rating. For example, a VIP rating score is 95 and a Diamond rating score is 80. VIPs are from 95-100 points while Diamond Customers will be 80-94 points. Note that the lowest rating (i.e. Bronze) must have a minimum score of 0.

After you finish creating all the desired rating grades, click the "Next" button to continue to the next section.
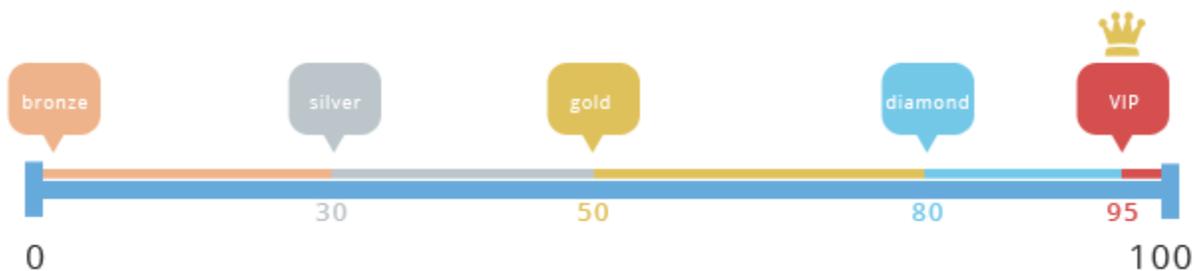
Setting Conditions

Next, you'll want to select your conditions and their corresponding point values. In Customization > Rating Settings > Set Conditions, you can check the box next to conditions to use, select the appropriate unit, then assign a point value.

The point values must be between 1-100 and the total values must add up to 100. This helps place greater weights on more important conditions and less emphasis on less important conditions. Customize rating conditions to fit the values of your company.

⚮ Set Conditions ▾

Next →

	Conditions	Unit	Point Value (100)
☐	Monthly Payment	None ▾	
☑	Last 6 Months ▾ Products Purchased	Count ▾	40
☑	Length of Business Relationship	Month ▾	25
☐	Transactions	None ▾	
☐	2016 ▾ – 2016 ▾ Yearly Payment	None ▾	
☐	2016 ▾ – 2016 ▾ Yearly Profit	None ▾	
☑	Total Payments (Past)	Dollar ▾	35
☐	Total Profit (Past)	None ▾	

💾 Save

25% / 25 Points
Length of
Business Relationship

40% / 40 Points
Products Purchased
(Past 6 Months)

100% / 100 Points

35% / 35 Points
Total Payments
(Past)
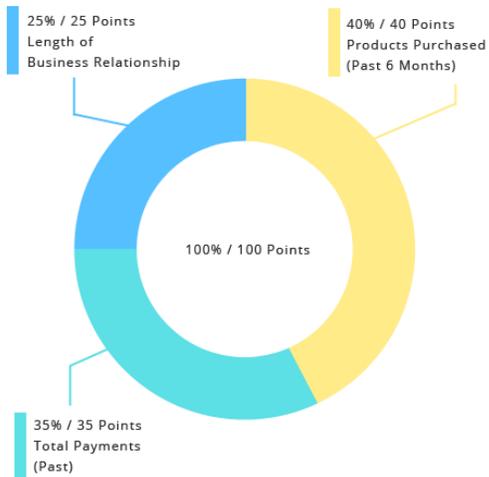
Checking Data by Conditions

Next, you can check how relevant the data you selected is. Head to Customization > Rating Settings > Data by Condition to check. Each condition selected from the previous step will show the number of applicable and non-applicable customers. You can also click the magnifying glass icon next to the number to see details on the applicable and non-applicable customers.

Condition	Applicable Customers
Length of Business Relationship	42 Q
Last 6 Months Products Purchased	10 Q
Total Payments (Past)	10 Q

Length of Business Relationship Applicable Customers ✕

Customer and Reps List

Customers	Assigned Rep
Greenstrip	Laura Woolf
Tonlamtrax	Jamie Bronte
Meddax	Eric Lee
Reding	Laura Woolf , Giovanni Alighieri
Zimstreet	Jamie Bronte
Donfind	Laura Woolf
Linestreet	Jamie Bronte

Detailed Point Settings

Finally, you'll need to set exact condition data per condition. This part requires a little arithmetic. Each condition will provide you with a maximum value. You'll need to work backward from this information to calculate the ranges for each rating. Use the following formula to get your number ranges:

$$\text{Data Value for a Rating Condition} = \text{Highest (Max.) Data Value} * \text{Rating Score (as a percent decimal)}$$

For example: for Products Purchased, the maximum value is 350 and the highest Rating (5 Rating) is VIP for 95% or better. So we multiply 350 * 0.95 and get 332. Thus, the range for the highest Rating is 332-350. The minimum range likewise automatically becomes the highest range for the next highest Rating (4 Rating). Continue to utilize the formula to get the data ranges for each rating for each respective condition. After finishing, click Save.

Set Rating by Conditions

	1Ratings		2Ratings		3Ratings		4Ratings		5Ratings		
Length of Business Relationship [25]	0 – 7	Month	7 – 12	Month	12 – 19	Month	19 – 23	Month	23 – 24	Month	✔
Range	42		0		0		0		0		
Products Purchased [40]	0 – 105	Count	105 – 175	Count	175 – 280	Count	280 – 332	Count	332 – 350	Count	✔
Range	6		0		2		1		1		
Total Payments (Past) [35]	0 – 3370	Dollar	3370 – 5656	Dollar	5656 – 8977	Dollar	8977 – 10660	Dollar	10660 – 11220	Dollar	✔
Range	6		2		1		0		1		

✔ Save   ↺ Reset

Now, before you apply the rating conditions, check to make sure your ratings correspond with the point values you selected. After being satisfied, click the Apply button. Every time "Apply" is clicked, the rating settings and conditions you apply will be reapplied to the current Customer base. We recommend applying Ratings periodically to see how Ratings for Customers change as your business develops.

Set Points Per Rank

	BRONZE	SILVER	GOLD	DIAMOND	VIP	
Score	0	30	50	80	95	✔

✔ Apply

Viewing Ratings

Ratings can be viewed in bulk and for each Customer individually. To view a bulk list of all Ratings and Customers, go to Customers > Rating. The list will appear and show the top Customers by top scores by default. You can click any Customer to view a breakdown of their score by condition.

Rating	Name	Previous Rating	Score
DIAMOND	Concone	DIAMOND	79
DIAMOND	Konplus	DIAMOND	67
GOLD	Germione Hranger	DIAMOND	60
GOLD	Careway	GOLD	54
SILVER	Kaning	SILVER	29
SILVER	Zoohotdax	SILVER	29
SILVER	Icetouch	SILVER	23
SILVER	Pearl Crabs	SILVER	23
BRONZE	Potato Guys	X	20

Concone

Conditions	Score
Length of Business Relationship	4.17
Products Purchased	40
Payment (Past)	35

Close

Likewise, you can view Rating History for Customers in their details page. Click the Rating History **Rating History** button to check previous ratings and score breakdowns.

Customer Rating History

2015/09/21

22:33 **DIAMOND** - 79Points
Length of Business Relationship:4.17
Products Purchased:40
Payment (Past):35

2015/09/18

09:06 **DIAMOND** - 80Points
Length of Business Relationship:5
Products Purchased:40
Payment (Past):35

Close