

How To Discover Which Of Your Customers Are Spending Less

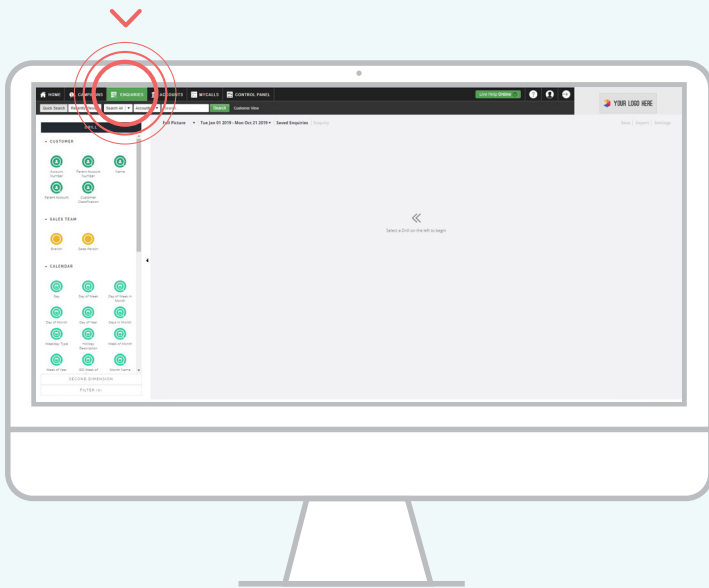
Desktop

The Variance Enquiry within sales-i allows you to compare over two different date ranges to find any rise or to stop any leakage in spend.

This guide will show you how to use this enquiry to see a list of customers who are spending less with you allowing you to protect and improve sales growth.

01 CLICK ENQUIRIES

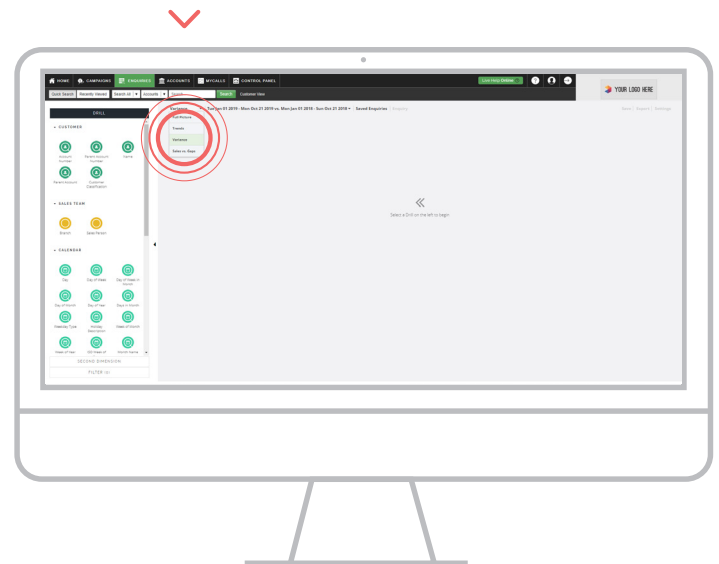
Click Enquiries from the top black navigation.



02 CLICK DROP DOWN

This will give you a choice of report types.

Select Variance from the drop down list as this enquiry type is the only enquiry with two different date ranges.

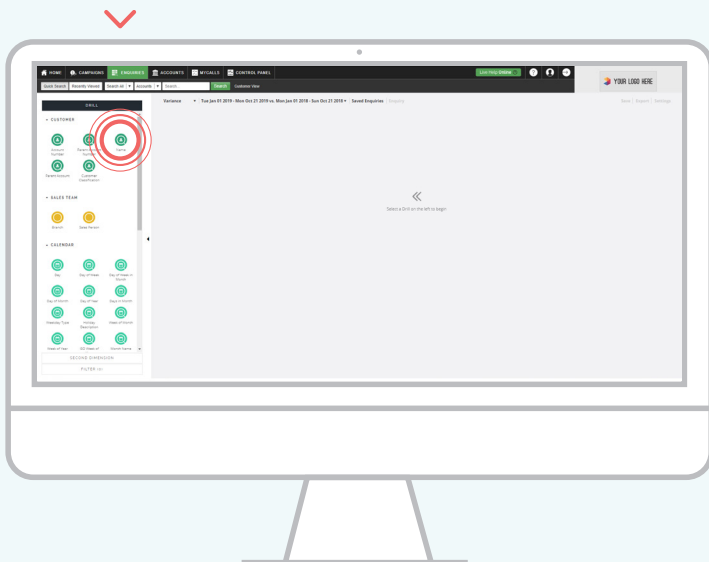


03 SEARCH

Click on the Name bubble to view a list of your customers.

Note: Name shows spend for sub-accounts

Alternatively, you can use the Parent Account bubble to roll up spend for all of the Sub Accounts that are associated into one parent Account.

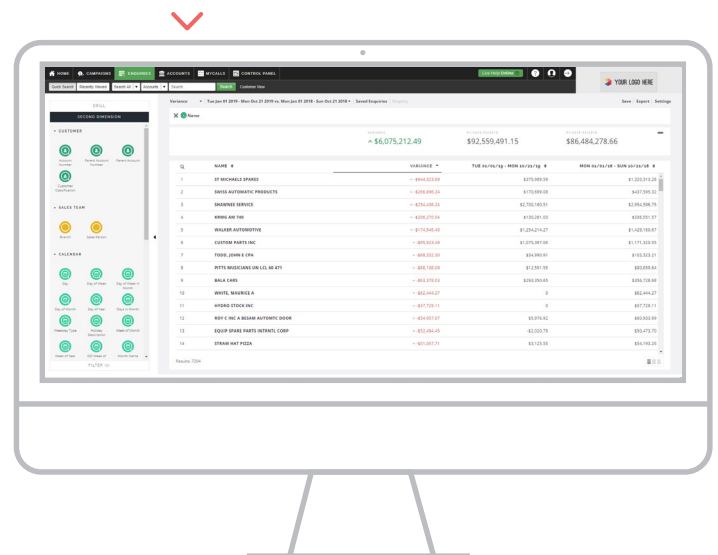


04 RESULTS

sales-i will default to show your biggest shrinking customer first YTD vs the PYTD and the variance between those two figures.

These are your customers that are spending less year on year.

Note: You can click on any of the table headers to sort them in alphabetical, spend this year, spend last year, ascending or descending order. You will know which column you have selected by checking the pointer in the column header.



05 TOP TIP

Should you wish to select different date ranges, click on the date range towards the top of the Enquiries screen and choosing a new date range selecting apply, will change the comparison ranges accordingly.

