

How To Discover Which Of Your Customers Are Spending Less

Android

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.



CLICK ENQUIRIES ...

From the navigation bar at the bottom of your screen, tap 'Enquiries'.



02

CLICK DROP DOWN ···

Here you can choose whether to dive into a already saved enquiry or to start a new enquiry.

Tap the red 'New Enquiry' button on the top left of your screen.



Tapping this button will then give you 3 enquiries to choose from.

Tap on Variance.

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|---|------------------|-----------|-------------|
| Enquiries | | | |
| Q Saved Enquiries | | | New Enquiry |
| SAVED ENQUIRIES | | | A-Z |
| Northwest Auto Service - Products - Full Picture | YTD | | 0 |
| Riviera Autos of Tampa - Products - G Sales vs. Gaps | Current 3 Months | | G |
| Straw Hat Pizza - YTD Variance | | | Θ |
| Top 10 Customers Spend on Product Full Picture | s - YTD | | 0 |
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CHOOSE BUBBLE

Here you will see your data analysis bubbles.

These bubbles are broken down into 5 analysis fields. Customer, Sales Team, Calendar, Sales and Product.

Scroll down your screen to see more bubbles. In the Customer Analysis Field, tap the 'Name' bubble.



05 RESULTS

sales-i will default to show your biggest shrinking customer first.

You can now see your customers spend for the current 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 tap on any of the table headers to sort them in alphabetical, ascending or descending order.

The default date range selected includes the current month and the last full day, meaning you can now compare dates up to the end of the last day in both date ranges.

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|--|--|------------------------|
| | | |
| Name | | |
| | C Dec 31, 2018 - Oct 20, 2019 Dec 31, 2017 - Oct 20, 2018 | |
| Q Search by 'f | Name' | |
| Totals VARIANCE (Sa | ales Value) 🔺 | (|
| \$6,075,212 | \$92,559,491 | \$86,484,278 |
| VARIANCE (SALES W) | ALUE) DEC 31, 2018 - OCT 20, 2019 | DEC 31, 2017 - OCT 20. |
| St Michaels Spare | \$ | |
| -\$944,323 | \$375,989 | \$1,320,313 |
| Swiss Automatic F | Products | |
| -\$266,896 | \$170,699 | \$437,595 |
| Shawnee Service | | |
| -\$254,436 | \$2,700,160 | \$2,954,596 |
| Krmg Am 740 | | |
| -\$206,270 | \$130,281 | \$336,551 |
| Walker Automotive | e | |
| | \$1,254,214 | \$1,429,160 |
| -\$174,946 | | • |
| -\$174,946 Custom Parts Inc | | |
| -\$174,946 Custom Parts Inc -\$95,923 | \$1,075,397 | \$1,171,320 |
| -\$174,946 Custom Parts Inc -\$95,923 Todd, John E Cpa | \$1,075,397 | \$1,171,320 |
| -\$174,946 Custom Parts Inc -\$95,923 Todd, John E Cpa -\$68,332 | \$1,075,397 \$34,990 | \$103,323 |
| -\$174,946 Custom Parts Inc -\$95,923 Todd, John E Cpa -\$68,332 Pitts Musicians Un | \$1,075,397 \$34,990 h Lci 60 471 | \$1,171,320 |

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