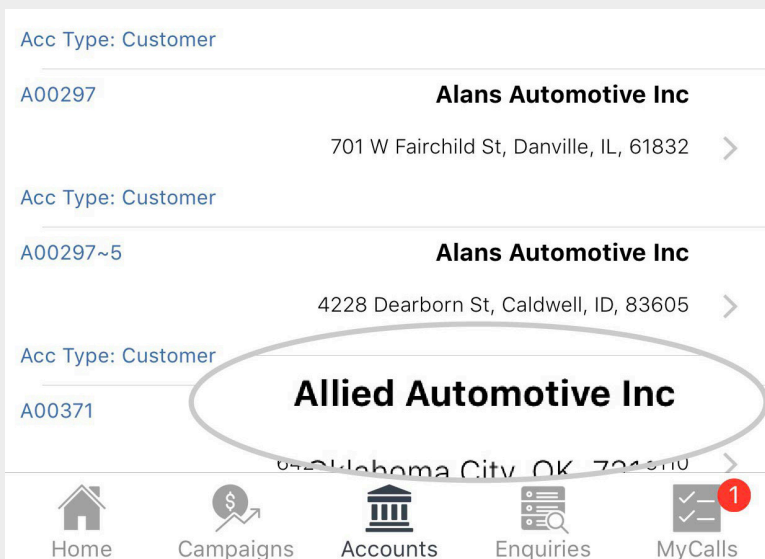# HOW TO USE SPEND MIX ANALYSIS - APPLE

This guide will show you how to use the Spend Mix Analysis feature within sales-i.
This feature allows you to view how much a company is spending in a certain product area
against your market averages, enabling you to view potential sales improvement areas.

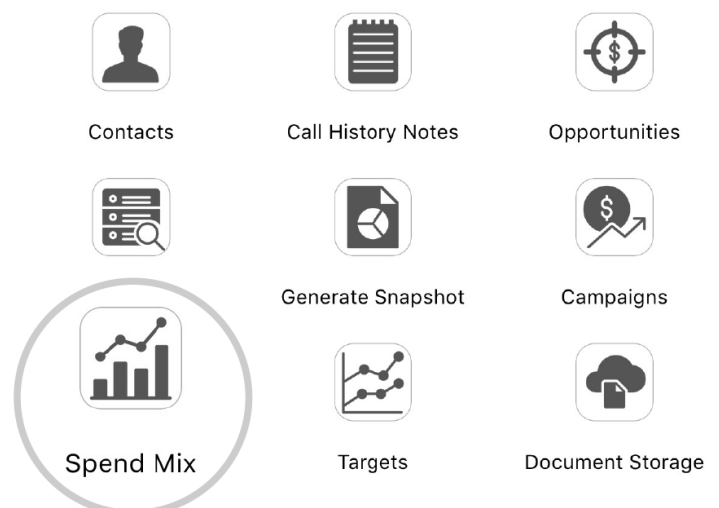**01** Use the Quick Search bar to find the account you would like to view.

02 Tap the account you would like to view.

03 The company's account card will now appear showing different information about your chosen account.

To view the company's Spend Mix Analysis. Click **Spend Mix** under the Actions section.

Next, choose whether to select **Parent Account** or **Customer** from the options that appear.

04 You will now see a Spend Mix Analysis chart and below that a table. The bar shows the amount spent ytd by your selected company on that product group. The line shows the Market Average.

Tap on a bar and the chart and the information underneath it will change to show you some information about that particular product group including:
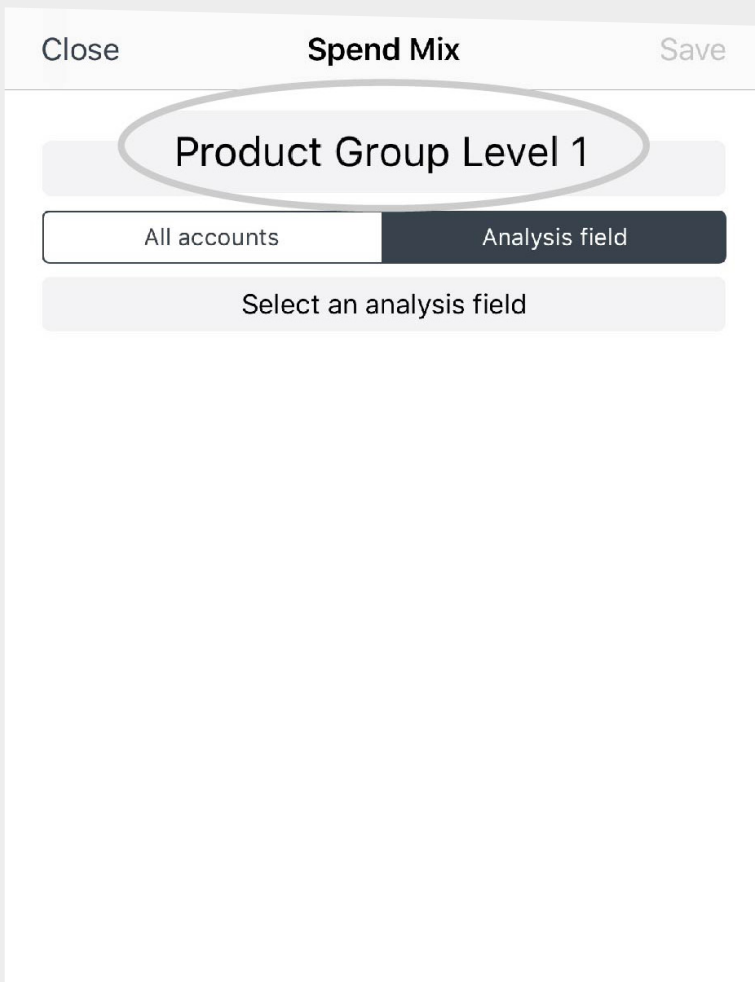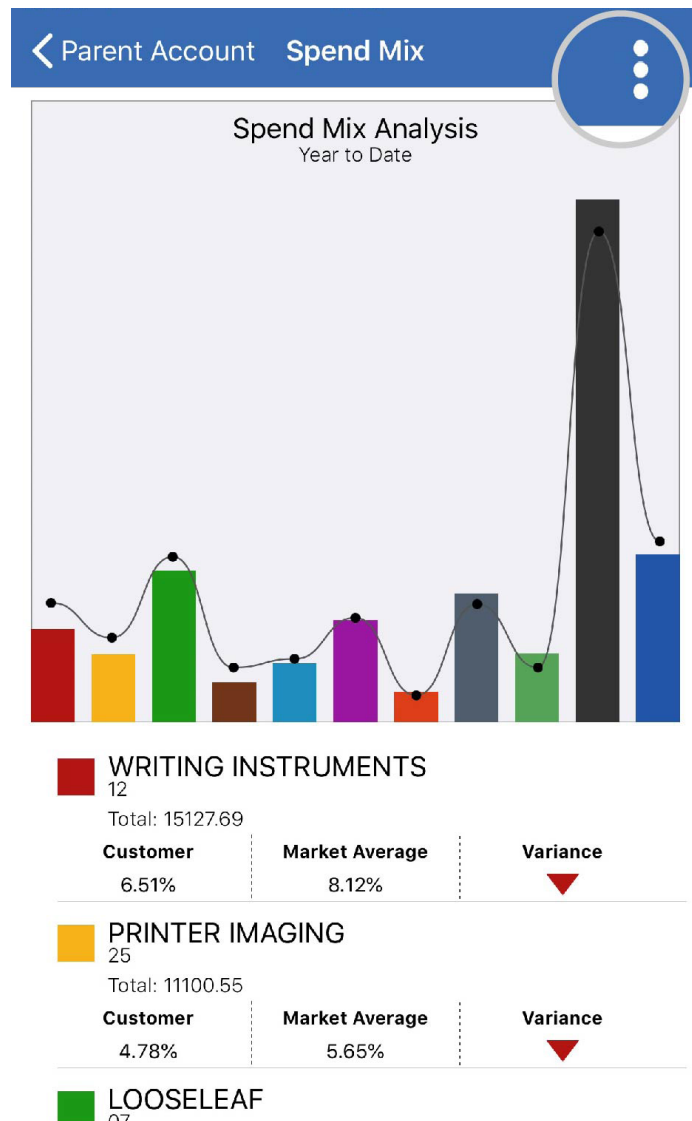
The name of the Product Group. and the **Total** spent year to date.

Customer indicates the % share of their total spend YTD on that product group.

Market Average is the average of all of your accounts in sales-i that have spent money in your selected Product Group ytd.

Variance indicates whether your customer has spent above (green arrow) or below (red arrow) the Market Average, if they've spent below average this could be an area for your sales rep to target.

To see further options tap on the **three dots icon** in the top right hand side.

Spend Mix Analysis
Year to Date

WRITING INSTRUMENTS
12

Total: 15127.69

Customer	Market Average	Variance
6.51%	8.12%	▼

PRINTER IMAGING
25

Total: 11100.55

Customer	Market Average	Variance
4.78%	5.65%	▼

LOOSELEAF
07

Close   **Spend Mix**   Save

Product Group Level 1

All accounts	Analysis field

Select an analysis field

05 By default you see Product Group Level 1 products.

To view other Product Group Levels, tap **Product Group Level 1** and then select a different product group level.

06 Your market average figure, (the line graph), is based on all of your accounts by default.

If you want to change the market average figure, for example to see the market average for these product groups based on Sales Territory, tap **Analysis field** and then tap **Select an analysis field.**

Close	**Spend Mix**	Save

Product Group Level 1   **1**

All accounts	Analysis field

Select an analysis field   **2**

‹ Spend Mix

Branch
Sales Rep
Sales Territory

07 You will now see some further analysis field,

These relate to the customer analysis bubbles that your company has enabled. Options may include Branch, Buying Group, Sales Rep or Sales Territory.

For example, you could select **Sales Territory** and select **Midlands** to see if this company is above or below the market average compared to all companies in that territory.

---

08 Once you have chosen your new options tap **Save** in the top right hand corner.

The graph and table will update.

Close	**Spend Mix**	Save

Product Group Level 1

All accounts	Analysis field

Sales Territory

Midlands