

# HOW TO USE SPEND MIX ANALYSIS - ANDROID

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.



## Search results for 'Ashford'

Filter Search Results

### Ashford Printers

1670

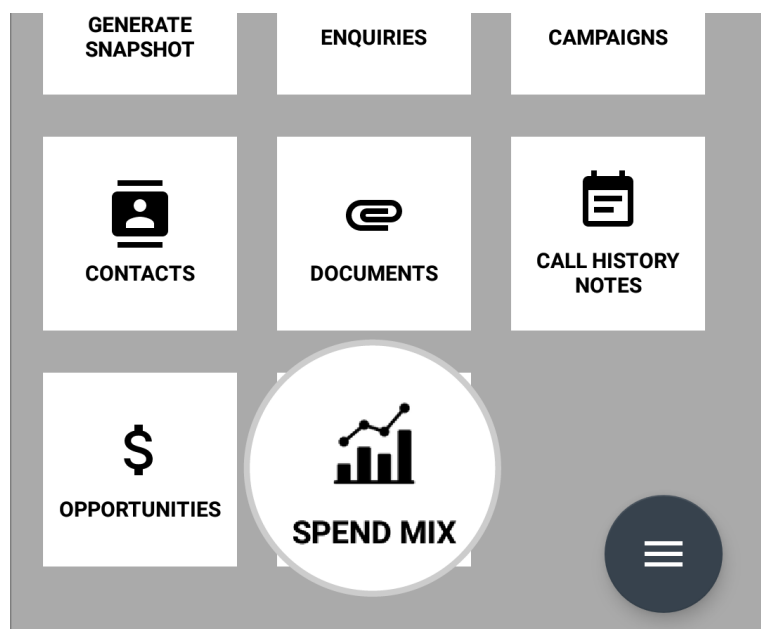
WHITE MOUNTAIN RD, HIGHWAY 73 &  
MAIN STREET, WHEATON, AZ, 85941

### Ashford Design

3475

2202 East 49th West St Ste 700, Tulsa, OK, 74105

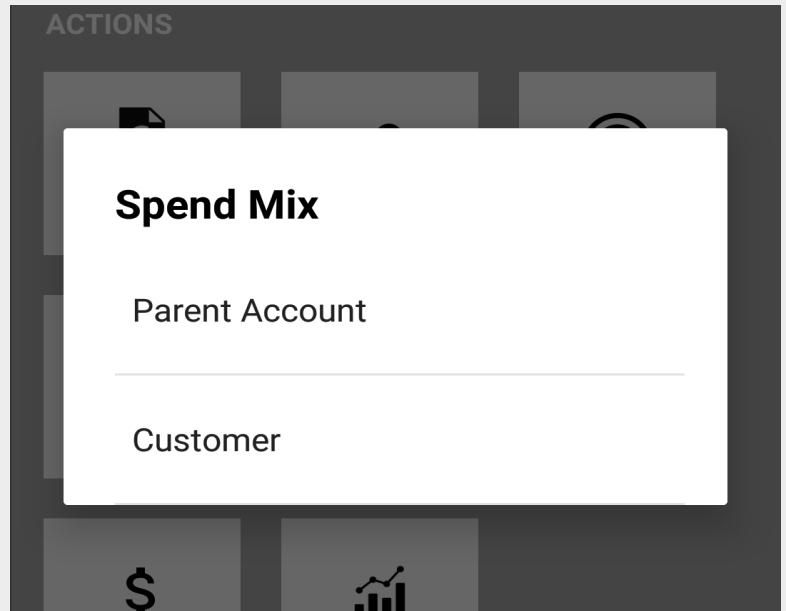
**02** Tap the account you would like to view.



**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.

**04** Next, choose whether you want to see information for the **Parent Account** or **Customer**.



**05** 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:

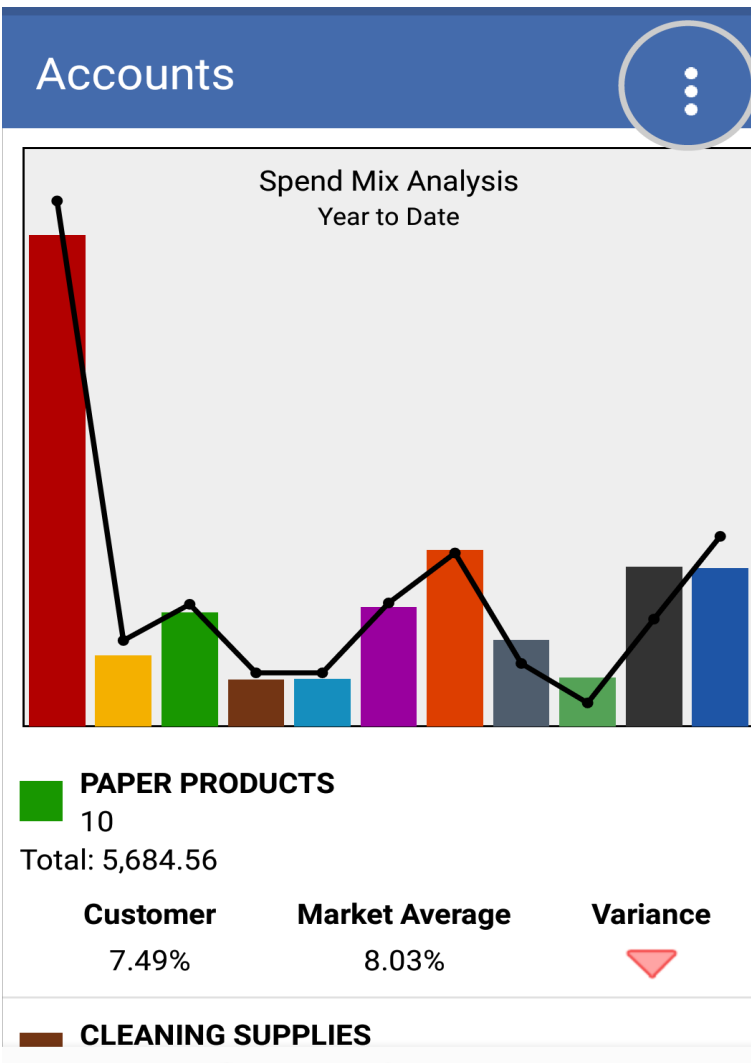
The name of the Product Group, and the **Total** spent year to date.

**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.

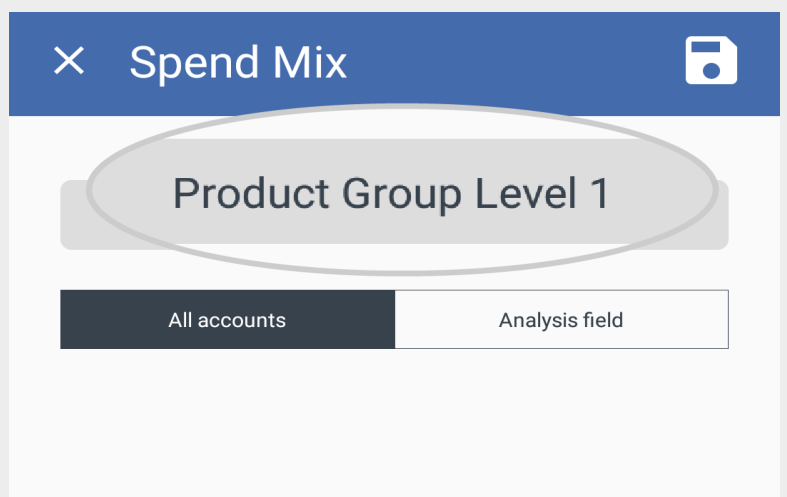
**Variance** indicates whether your customer has spent above (green arrow) or below (red arrow) the Market Average, if they've spent below average this could be an area for your sales rep to target.

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



**06** 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.



## × Spend Mix

Product Group Level 2

All accounts

Analysis field

1

Select an analysis field

2

**07** 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**.

**08** 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.

All accounts

Analysis field

Branch

Sales Rep

## × Spend Mix



Product Group Level 2

All accounts

Analysis field

Sales Rep

Chuck Norman

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

The graph and table will update.