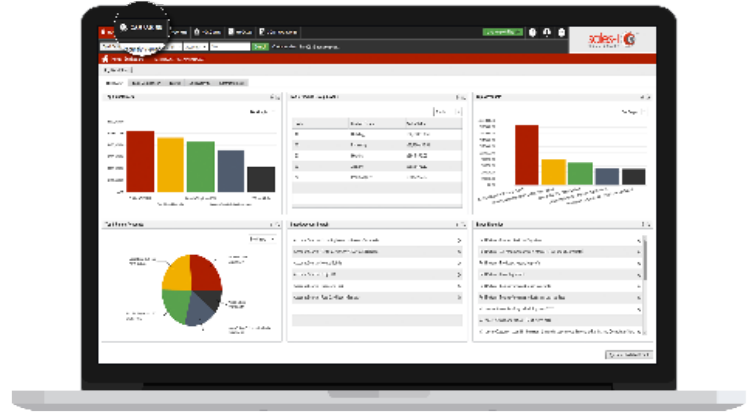# HOW TO SPOT WHICH CUSTOMERS HAVE REDUCED SPEND

This guide will show you how to use sales-i's Campaigns features to find which customers' spend shrunk by 10% or more over the last 3 months.

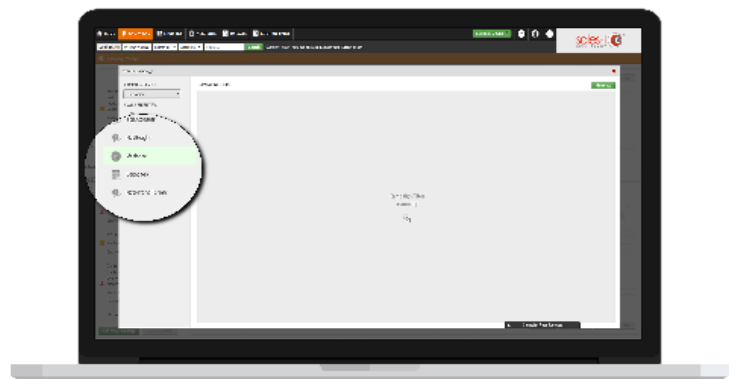Note: Campaigns can only be created by power users. However, anyone with access can run the results.

**01** From the top navigation, click **Campaigns.**
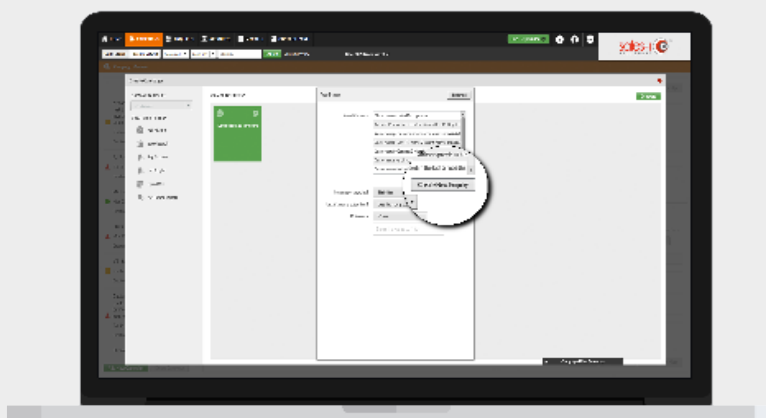


**02** Click the green **Add New Campaign** button at the bottom left of the screen.
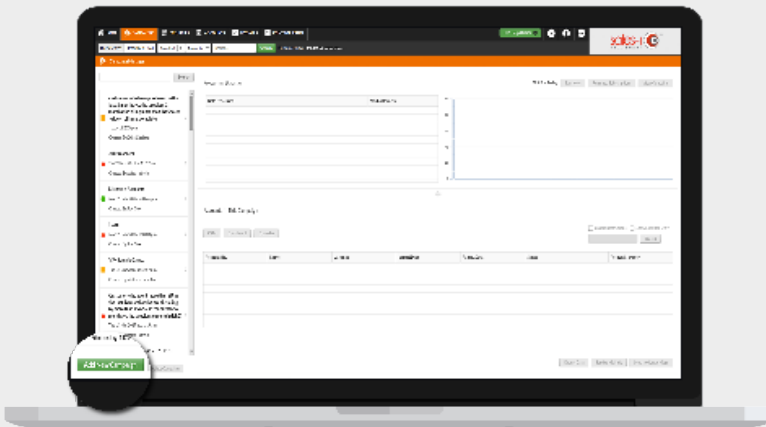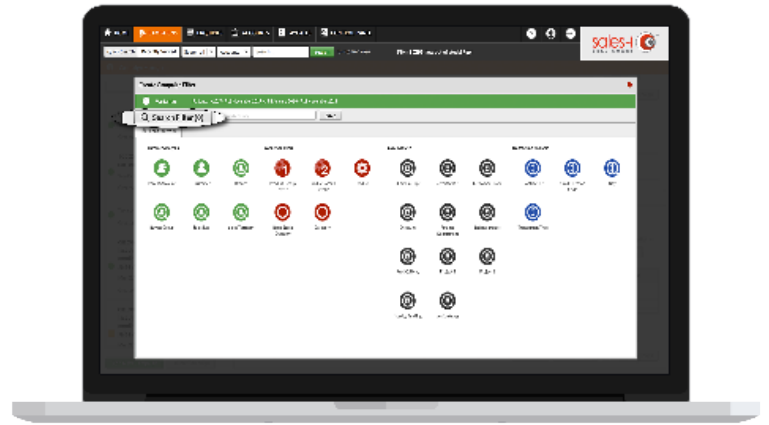


**03** Select the **Variance** filter and drag and drop into the large box on the right.



**04** In the new window that appears click **Create New enquiry.**

**05** Click **Search Filter** in the top left of the window, this will allow you to adjust many filters.
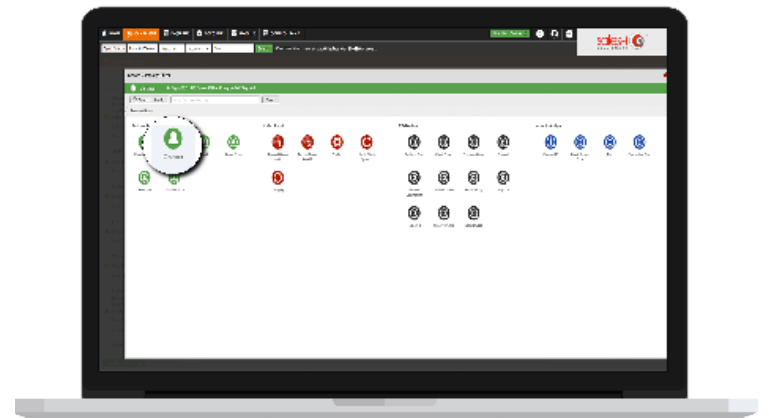


**06** Select the **3 months** date button, then tick **Show Complete Months*** and then click the green **save** button in the bottom right hand corner.

*When ticked the **Show Complete Months** option excludes the current calendar month.
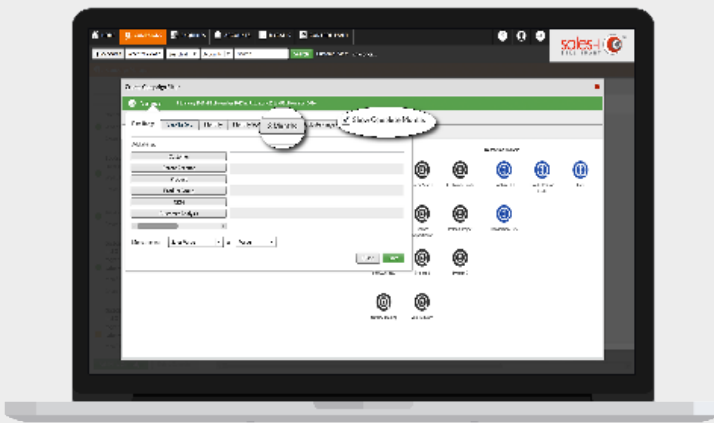


**07** Select the **Customer** bubble, which can be found in the Customer Analysis section.



**08** Now name your enquiry. For this example we'll use 'customers who have purchased in the last 3 months vs. the previous 3 months - rolling & complete'. Click **Save.**

*Please note: At this point you're saving this enquiry using all data from the time frame selected.
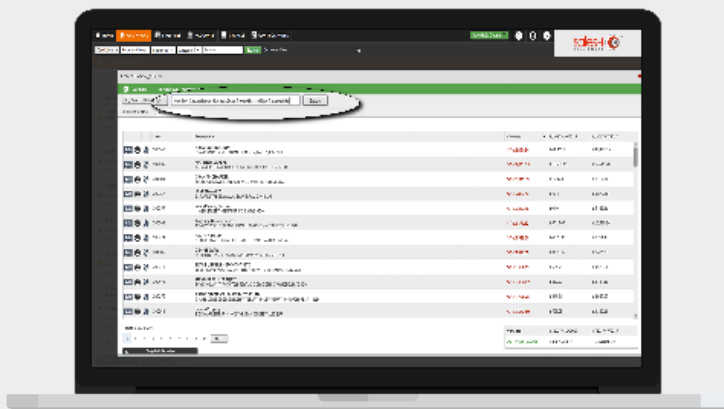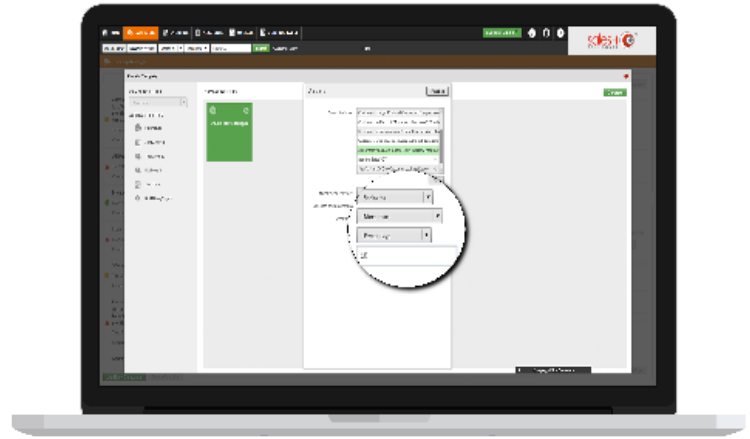
**09** Ensure the recently selected enquiry is highlighted green at the top of the box.

The drop-down menus act as a series of questions that will exclude customers from the recently saved enquiry based on your answers.
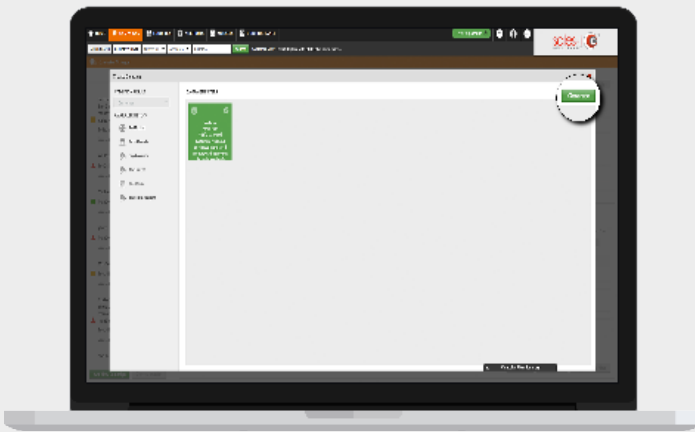Options used for this specific campaign:
a. Shrinking
b. More Than
c. Percentage
d. Enter 10 into the last box.
Then press **finished** .





**10** Press the green **Generate** button in the top right of the window.*

*Please note: This campaign uses a single filter, other campaigns may use more than one filter. This can be achieved using similar steps as detailed above
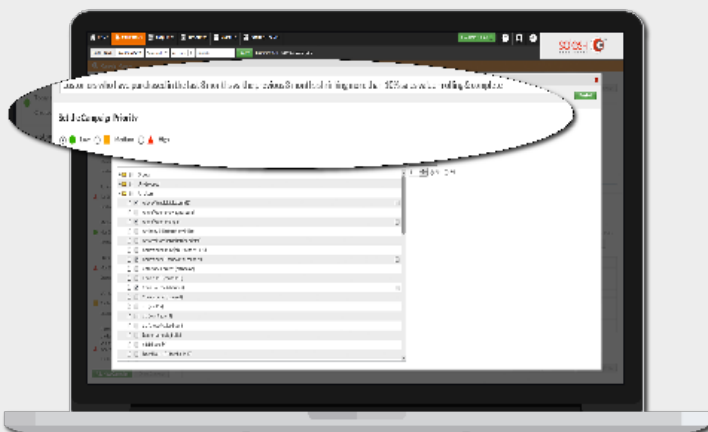
**11** At this stage a black box will appear warning you that you will not be able to change your Campaign once you press Yes.

Click **Yes.**
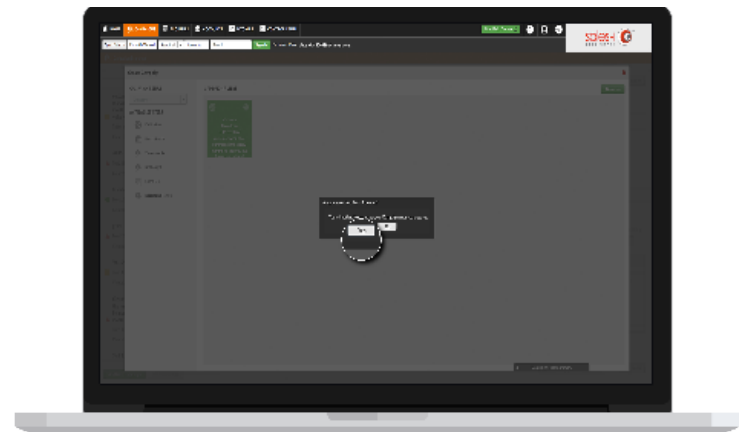




**12** Name this overall campaign 'customers who have purchased in the last 3 months vs. the previous 3 months shrinking more than 10% sales value - rolling & complete'.

Using the traffic light system, give your campaign a colour of priority.

**13** Next, select the users you wish to access the campaign results.

Using the grey arrow next to **All Users** folder, will open up the list of users.

Select the box next to **All Users** if you wish to allow everybody to access the campaign*

*If used, **Groups** will assign access to the users included in the relevant group(s).
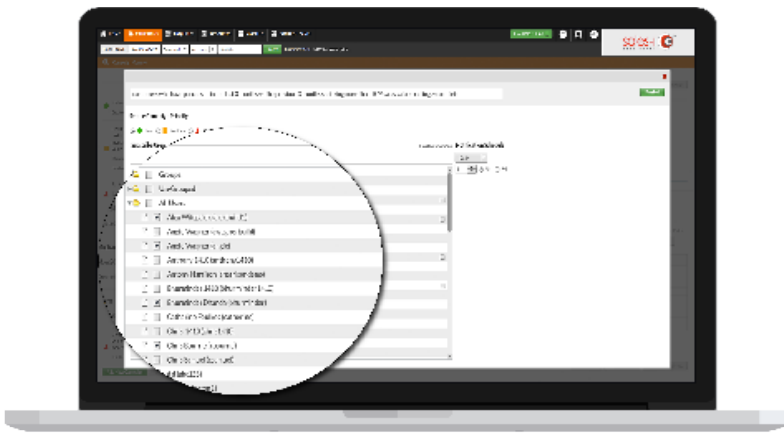
**14** When you're ready to move on, click **finished**.

This section is editable for name, priority and user selection.

Optional: The tick box to the right of the user(s) selected to access the campaign is an optional email notification reminder.
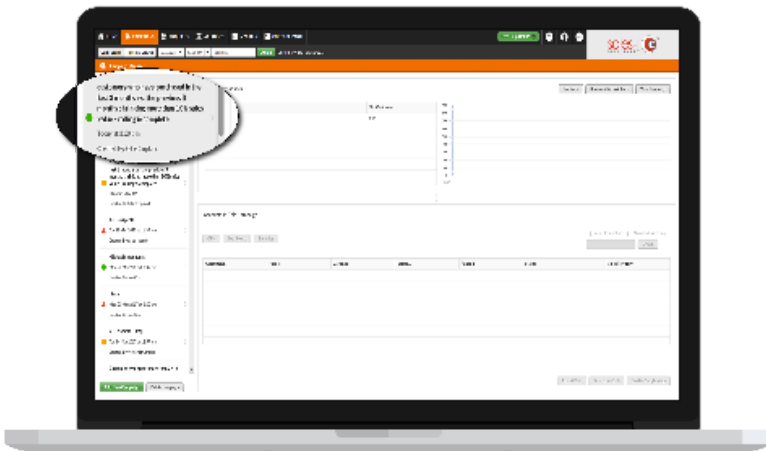
Under **Notification Schedule**, select the frequency you would like an email reminder to run the campaign to be sent out.
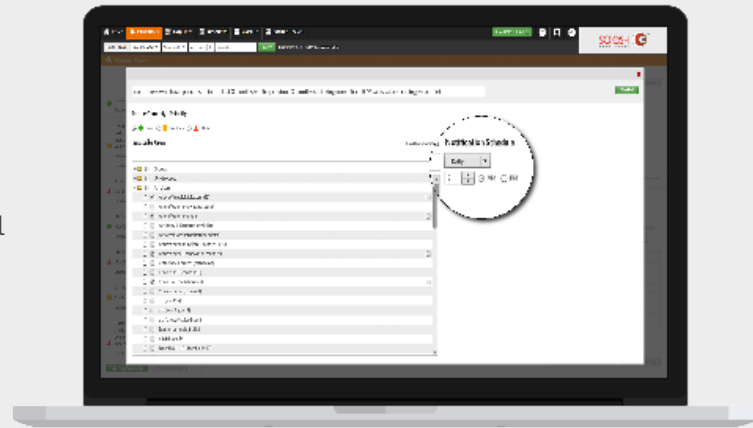




**15** To view the results of this campaign, click on its title in the menu on the left.*

*Please note: Only the Power user can see the date processed tab and associated line graph.

Select **Date Processed** to see the results.

**16** You will now see a list of companies. The **Variance** column shows how much their spend has fallen by a percentage over the last 3 months.*

**Range 1** is the closest date range to the current date.
**Range 2** is the furthest date range from the current date.

*Please note: Clicking the header of a column will sort by ascending or descending order.

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