HOW TO USE ENQUIRIES ON YOUR ANDROID DEVICE

The Enquiries section of sales-i allows you to interrogate customer and product transaction data. Each enquiry works in a similar way, but each does a slightly different job. This how to guide shows you how to run a Variance enquiry.

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

02 You will see menu options for all Enquiry types: Full Picture, Variance, Trends and Sales vs. Gaps, as well as access to your existing Saved Enquiries and the option to Start With Filter.

   Variance is a good enquiry for us to start with. It compares this year to last year, and identifies growth or shrink in spend.

   Tap Variance now.

03 This next screen is your Enquiries home page. You’ll see four main sections: Customer Analysis, Product Analysis, CRM Field and Transaction Analysis. These are the four categories through which the system can drill into information for you depending on what you’re trying to find out.

   For now, just tap Product Group Level 1 from Product Analysis, which is the second category.
sales-i has now run this query for you, making a
comparison between the sales of your products
for this year and last year. The results can be seen
in the table.

1) The totals bar in light green at the top of the
page shows an overall sum total for each of the
columns described below. Red arrows indicate a
shrink in spend, green arrows indicate a growth in
spend.

2) The Variance column displays the difference
in sales between this year and last year.

3) The final two columns are this year’s sales
and last year’s sales. Range 1 is always the closest
date range (current YTD) whereas Range 2 is
always the furthest date range (previous YTD).

To get even more specific results (such as,
which customers have purchased a certain
product group) tap and hold on the line.
This reveals the Advanced Drill (DRILL+) at the
top of the screen.
Tap this to be taken to your Enquiries home
page where you can drill further into your data
for this product group.

TOP TIP:
QUICK DRILL PATH

You can also tap on a line to go down a pre-defined
drill path.

Tapping a line in your results list will always take you
down through Product Group Levels and end with
Product.

Please Note: If you want to take a different step at any
point on this drill path, you will need to tap and hold
and use the advanced drill (DRILL+).