HOW TO USE ENQUIRIES ON YOUR APPLE 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 (as well as some Quick Drills for your convenience).

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 the Quick Drills section.
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 % variance in spend between this year and last year.

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

4) The final two columns are this year’s sales and last year’s sales. Range 1 is always the closest date range (current YTD). 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) swipe right-to-left on the line.

This reveals the Advanced Drill icon.

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 swipe right-to-left on the line and use the Advanced Drill icon.