

## Companion Items

This strategic game plan will help locate customers who are buying items and not buying the companion items that the customer should be purchasing to accompany the particular items that they are buying. In order to go through this process you should have received the CompanionItemComparitive.xls file for comparison in the final step.

To get started, determine the items that you would consider to be companion items, ie. Proprietary Towels and Proprietary Soap, Floor Machines and Floor Pads. If you want to focus on a certain supplier be sure to include that in the dimensions when we get started.

For our example, we will be using who is buying towels and not buying soap.

To start we will find customer who are buying 'Towels'

- a. Select View: Market Analysis
- b. Select Dimension: Supplier Name, Papercraft/A.W. Mendenhall
- c. Select Dimension: ItemSubCategory, Paper: Universal Towels
- d. Run Report

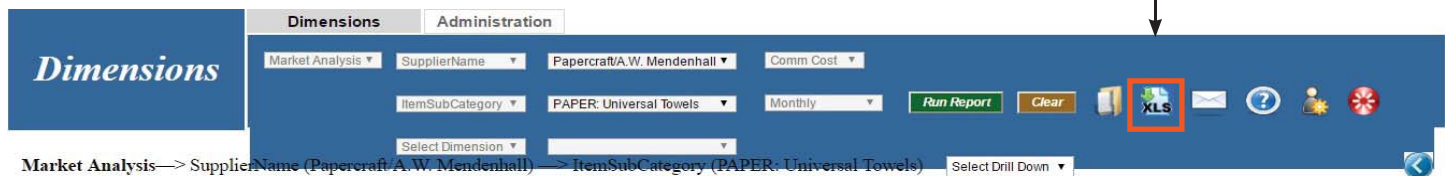


Market Analysis → SupplierName (Papercraft/A.W. Mendenhall) → ItemSubCategory (PAPER: Universal Towels) Select Drill Down ▼

e → Categories ▼ Select Top: 10 ▼ Start Date: 1-Apr-2013 End Date: 30-Mar-2014 Update f

Decription	Amount	Qty	GP	GP%	Sales	No-Sales
PAPER	52,133.22	1,927	18,528.91	35.54		

- e. Prior to clicking on Sales, change Categories to Sub-Categories.
- f. Now click on Sales to display customers
- g. Click on the XLS Button to export to Excel



Market Analysis → SupplierName (Papercraft/A.W. Mendenhall) → ItemSubCategory (PAPER: Universal Towels) Select Drill Down ▼

Customers who purchased Category PAPER -- For Sales 4/1/2013 through 3/30/2014

Total Sales Over:  PAPER Sales Over:  Have Not Purchased in: Select ▼

CustomerName	Salesman	Tot Sales	Cat Sales	Cat GP	Cat GP%	Last Sale Date
Anderson Frozen Foods	Wallace Semper	4,904.40	605.22	315.38	52.11	3/21/2014
Armadillo Floors	Mike Hughes	11,290.30	40.40	6.06	15.00	1/1/2014
Armadillo Floors	Wallace Semper	11,290.30	100.70	15.11	15.00	3/5/2014
Auburn Services	Wallace Semper	3,963.42	196.94	92.87	47.16	1/24/2014

Save the list with a name that is fitting ie. PaperSales, add the supplier name if using multiple suppliers for analysis.

Now to find customers who are not buying 'Soap'

- a. Select View: Market Analysis
- b. Select Dimension: Supplier Name, ProLink/GOJO Industries
- c. Select Dimension: ItemSubCategory, Chem: Hand Soaps
- d. Run Report



Market Analysis → SupplierName (ProLink/GOJO Industries) → ItemSubCategory (CHEM: Hand Soaps) [Select Drill Down]



- e. Prior to clicking on No Sales, change Categories to Sub-Categories.
- f. Now click on NoSales to display customer
- g. Click on the XLS Button to export to Excel



Customers who did not purchased Category -- For Sales 4/1/2013 through 3/30/2014

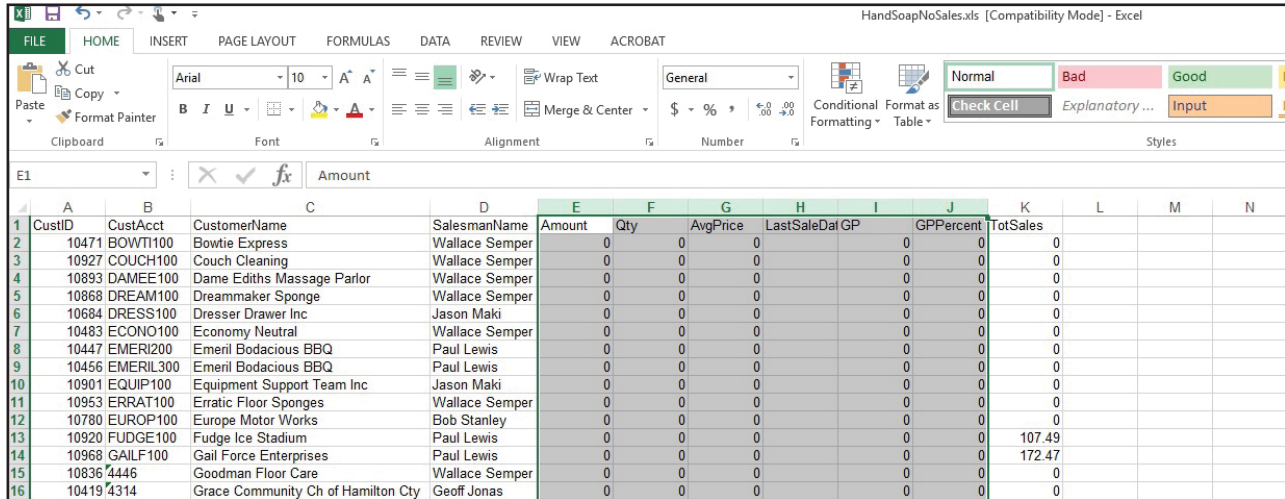
Total Sales Over:

CustomerName	Salesman	Tot Sales	Cat Sales	Cat GP	Cat GP%	Last Sale Date
Rose Acres Farms	Mike Hughes	30,680.40	0.00	0.00	0.00	
Major Tool & Machine, Inc	Paul Lewis	5,716.19	0.00	0.00	0.00	
Shock Electronics	Wallace Semper	4,759.14	0.00	0.00	0.00	
Margaret Mary Com Hospital	Paul Lewis	4,650.00	0.00	0.00	0.00	
Wal-Mart/Bloomington #1991	Mike Hughes	4,085.89	0.00	0.00	0.00	
...	...	...	...	...	...	...

Save the list with a name that is fitting ie. NoSoapSales, add the supplier name if using multiple suppliers for analysis.

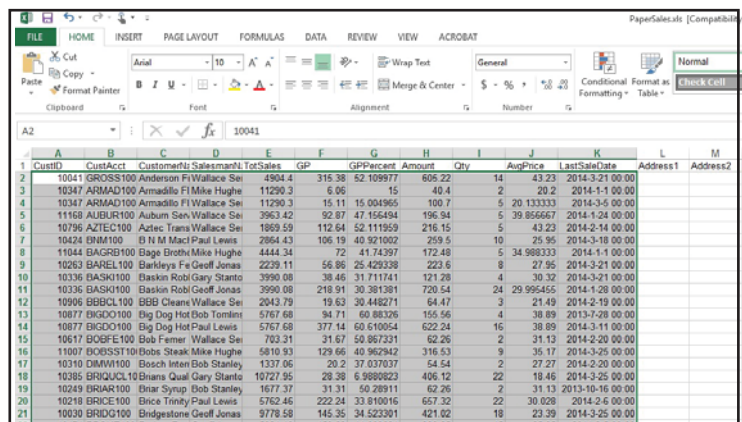
Now that we have our lists exported, we need to clean up one prior to putting into the comparative sheet for analysis.

Open the No Sales Excel file to remove the Columns E – J as they will not be used in the analysis and Save (to remove columns, place your mouse over the top of Column E until it turns into an arrow, click and hold and drag over to column J, now right click and delete) (see image below)

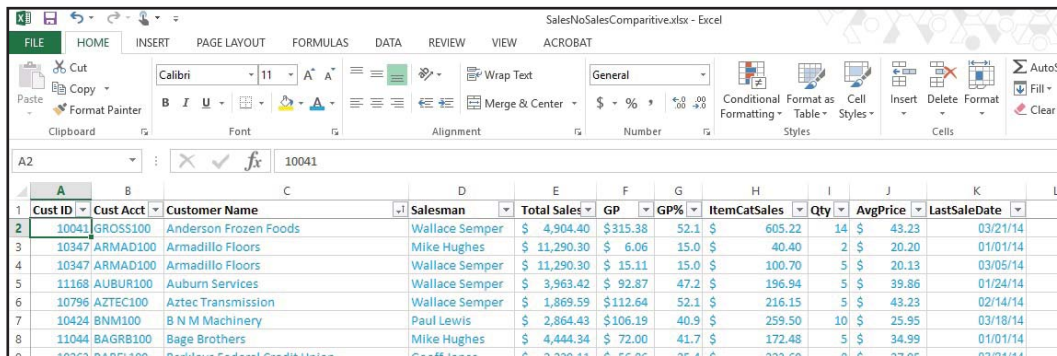


Save after deleting Columns E - J

Now open the CompanionItemComparative.xls file for inputting the data in the following steps.



Open CompanionItemComparative.xls, Click in the A2 Cell and Right Click, Choose Paste Values, while the data is still all selected, Right Click again and choose a color for the font to distinguish customers in the final analysis step. We used blue for sales. (see image below)



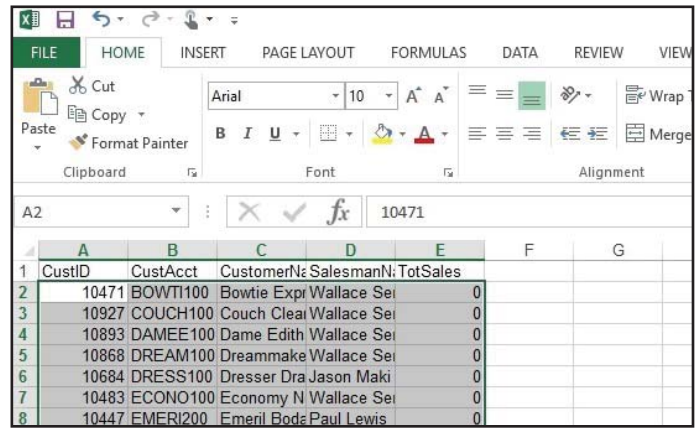
Repeat this step if adding additional data. Be sure to arrow down to the first open cell in the A column and remember to color code the data prior to proceeding to the next step of entering the No Sales data.



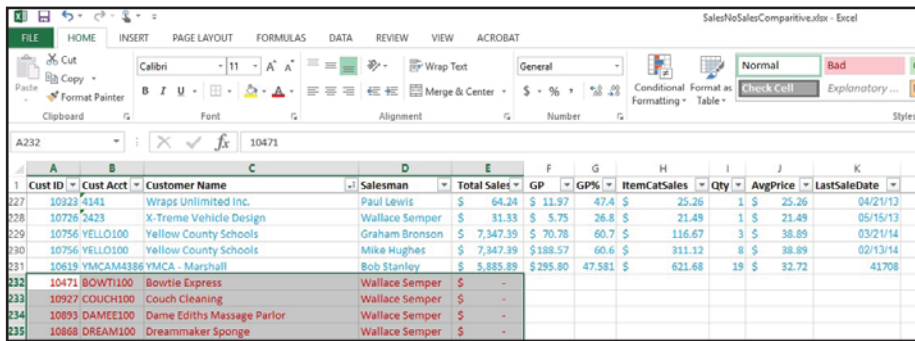
Now to input the No Sales data.

Open the No Sales Excel File to copy data from. Click in the A2 Cell, hold down Ctrl + Shift and arrow to the right and down to highlight the data. (see image to the right)

Right click and copy



Open the CompanionItemComparative.xls, find the first open cell in the A column of the sheet below the sales that we just pasted. Click in the cell and Right Click, Choose Paste Values, while the data is still all selected, Right Click again and choose a color for the font to distinguish customers in the final step. We used Red for no sales.(see image below)



Repeat this step if adding additional data. Be sure to arrow down to the first open cell in the A column and to color code the data prior to proceeding to the next step of entering the No Sales data.

Now, follow the instructions in the Notes field of the CompanionItemComparative.xls sheet for analyzing the data that you have just entered.

**Steps/Notes:**

The following steps are required prior to analyzing data and exporting

- 1) Paste copied sheet from Sales sheet in the A2 cell by Right-Clicking and Paste Values and color code according to Item, Supplier, etc.
  - a. If there are multiple suppliers/item cats/sub-cats be sure to add all these prior to proceeding to step 2
- 2) Paste copied sheet from NoSales sheet in the first open cell at bottom of the Sales list first pasted by Right-Clicking and Paste Values and color code according to Item, Supplier, etc.
- 3) With all sheets now pasted the following can be done:
  - a. Choose SalesRep from Salesman filter to isolate each rep

Go down the list of customers and when you come across the same customer back to back, this would indicate that this customer is buying an item that should be buying the companion item/s. (see image below)

	A	B	C	D	E	F	G	H	I	J	K
1	Cust ID	Cust Acct	Customer Name	Salesman	Total Sales	GP	GP%	ItemCatSales	Qty	AvgPrice	LastSaleDate
38	11142	INWUL4643	Indiana Wesleyan Univ/Lexington	Geoff Jonas	\$ 5,868.70	\$ 45.87	30.493	\$ 150.43	7	\$ 21.49	41702
39	10271	3721	Indiana Wesleyan Univ/Louis	Geoff Jonas	\$ 1,289.01	\$ 142.40	31.554	\$ 451.29	21	\$ 21.49	41497
42	10930	4489	Indianapolis Public Schools	Geoff Jonas	\$ -						
45	10161	3030	Infrastructure Contractors Inc	Geoff Jonas	\$ 155.23						
49	10616	2891	Integrator.com, Inc	Geoff Jonas	\$ 365.80	\$ 76.13	37.7	\$ 202.08	8	\$ 25.26	05/22/13
51	10616	2891	Integrator.com, Inc	Geoff Jonas	\$ 365.80						
53	10434	4329	ISU/Parsons Hall	Geoff Jonas	\$ -						