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	a	b 	c		d 					
Dimensions	Dimensions Markel Analysis T	Administrati	Papercraft/A.W. Mendenhall V PAPER: Universal Towels V	Comm Cost V Monthly V	Run Report Ck	ear 🚺	XLS D	■ ⑦	i 😣	

Market Analysis—> SupplierName (Papercraft/A.W. Mendenhall) —> ItemSubCategory (PAPER: Universal Towels) Select Drill Down •

e 	Categories • Select 10 •	Start Date: 1-Apr-2013	End Date: 30-Mar-2014	4 U	odate	f
Decription	Amount	Q	ty	<u>GP</u>	<u>GP%</u>	7
PAPER		52,133.22	1,927	18,528.91	35.54 51	lles <u>No-Sales</u>

- 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

	Dimensions	Administration	1			•			
Dimensions	Market Analysis 🔻	SupplierName T	Papercraft/A.W. Mendenhall 🔻	Comm Cost					
		ItemSubCategory T	PAPER: Universal Towels •	Monthly *	Run Report Clear		⊠ ②	🎄 🛞	
Market Analysis—> Supplie	rName (Papercraft	Select Dimension • (A.W. Mendenhall) –	▼ → ItemSubCategory (PAF	ER: Universal Towe	select Drill Down 🔻				3

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

Total Sales Over: 0	PAPER Sa	les Over: 0		н	lave Not Purch	ased in: Select 🔹
CustomerName	Salesman	Tot Sales	Cat Sales	<u>Cat GP</u>	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.

g

Now to find customers who are not buying 'Soap'



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

Total Sales Over: 0

CustomerName	<u>Salesman</u>	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	
D1	N.C.1 T.T 1	2 504 01	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)

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1 Cus	stID	CustAcct	CustomerName	SalesmanName	Amount	Qty		AvgPrice	LastSa	aleDat GP		GPPercent	TotSales				
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3	10927	COUCH100	Couch Cleaning	Wallace Semper		0	0		0		0	C	1.1	0			
4	10893	DAMEE100	Dame Ediths Massage Parlor	Wallace Semper		0	0	3	0		0	C		0			
5	10868	DREAM100	Dreammaker Sponge	Wallace Semper		0	0		0		0	C		0			
6	10684	DRESS100	Dresser Drawer Inc	Jason Maki		0	0		0		0	C		0			
7	10483	ECONO100	Economy Neutral	Wallace Semper		0	0		0		0	C		0			
8	10447	EMERI200	Emeril Bodacious BBQ	Paul Lewis		0	0		0		0	C		0			
9	10456	EMERIL300	Emeril Bodacious BBQ	Paul Lewis		0	0		0		0	C		0			
10	10901	EQUIP100	Equipment Support Team Inc	Jason Maki		0	0		0		0	C		0			
11	10953	ERRAT100	Erratic Floor Sponges	Wallace Semper		0	0		0		0	C		0			
12	10780	EUROP100	Europe Motor Works	Bob Stanley		0	0		0		0	C	1000	0			
13	10920	FUDGE100	Fudge Ice Stadium	Paul Lewis		0	0		0		0	C	107.4	9			
14	10968	GAILF100	Gail Force Enterprises	Paul Lewis		0	0		0		0	C	172.4	7			
15	10836	4446	Goodman Floor Care	Wallace Semper		0	0		0		0	C		0			
16	10419	4314	Grace Community Ch of Hamilton Cty	Geoff Jonas		0	0	1	0		0	C		0			

Save after deleting Columns E - J

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

Open the 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)

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2	10041	GROSS10	0 Anderson F	Fi Wallace Se	4904.4	315.38	52.109977	605.22		14	43.23	2014-3-21 00:00		
3	10347	ARMAD10	0 Armadillo F	FI Mike Hughe	11290.3	6.06	15	40.4		2	20.2	2014-1-1 00:00	1	
4	10347	ARMAD10	0 Armadillo F	FI Wallace Se	11290.3	15.11	15.004965	100.7		5	20.133333	2014-3-5 00:00		
5	11168	AUBUR10	0 Auburn Sei	rv Wallace Se	3963.42	92.87	47.156494	196.94		5	39.856667	2014-1-24 00:00	1	
6	10796	AZTEC100	Aztec Tran	s Wallace Se	1869.59	112.64	52.111959	216.15		5	43.23	2014-2-14 00.00		
7	10424	BNM100	B N M Mac	cl Paul Lewis	2864.43	106.19	40.921002	259.5		10	25.95	2014-3-18 00:00	1	
8	11044	BAGRB10	0 Bage Broth	hc Mike Hugho	4444.34	72	41.74397	172.48		5	34.988333	2014 1 1 00:00	-	
9	10263	BAREL10	Barkleys F	e Geoff Jonas	2239.11	56.86	25.429338	223.6		8	27.95	2014-3-21 00:00		
10	10336	BASKI100	Baskin Rot	bl Gary Stanto	3990.08	38.46	31.711741	121.28		4	30.32	2014-3-21 00:00		
11	10336	BASKI100	Baskin Rol	bl Geoff Jonas	3990.08	218.91	30.381381	720.54		24	29.995455	2014-1-28 00:00		_
12	10906	BBBCL10	BBB Clean	e Wallace Se	2043.79	19.63	30.448271	64.47		3	21.49	2014-2-19 00:00		-
13	10877	BIGDO100	Big Dog Ho	ot Bob Tomlin	5767.68	94.71	60.88326	155.56		4	38.89	2013-7-28 00:00		
14	10877	BIGUO100	Big Dog Ho	ot Paul Lewis	5/67.68	377.14	60.610054	622.24		16	38.89	2014-3-11 00:00		
15	10617	BOBFE10	0 Bob Femer	r wattace Se	/03.31	31.67	50.867331	62.26		2	31.13	2014-2-20 00:00		
16	11007	BOBSSTI	01Bobs Steal	k Mike Hughe	5810.93	129.66	40.962942	316.53		9	35.17	2014-3-25 00:00		
17	10310	DIMW100	Bosch Inte	n Bob Stanley	1337.06	20.2	37.037037	54.54		2	27.27	2014-2-20 00:00		
18	10385	BRIQUEL	OBrians Qua	al Gary Stanto	10727.95	28.38	6.9880823	406.12		22	18.46	2014-3-25 00:00		
19	10249	URIAR100	Briar Syrup	Bob Stanley	1677.37	31.31	50.28911	62.26		2	31.13	2013-10-16 00:00		
20	10218	BRICE100	Brice Trinit	y Paul Lewis	5762.46	222.24	33.810016	657.32		22	30.028	2014-2-6 00:00		_
21	10030	BRIDG100	Bridgeston	e Geoff Jonas	9778.58	145.35	34.523301	421.02		18	23.39	2014-3-25 00.00		

Rigth Click and Copy

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)

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2	10041	GROSS100	Anderson Frozen Foods	Wallace Semper	\$ 4,904.40	\$315.38	52.1	\$ 605.22	14	\$ 43.23	03/21	1/14
3	10347	ARMAD100	Armadillo Floors	Mike Hughes	\$ 11,290.30	\$ 6.06	15.0	\$ 40.40	2	\$ 20.20	01/01	1/14
4	10347	ARMAD100	Armadillo Floors	Wallace Semper	\$ 11,290.30	\$ 15.11	15.0	\$ 100.70	5	\$ 20.13	03/05	5/14
5	11168	AUBUR100	Auburn Services	Wallace Semper	\$ 3,963.42	\$ 92.87	47.2	\$ 196.94	5	\$ 39.86	01/24	1/14
6	10796	AZTEC100	Aztec Transmission	Wallace Semper	\$ 1,869.59	\$112.64	52.1	\$ 216.15	5	\$ 43.23	02/14	1/14
7	10424	BNM100	B N M Machinery	Paul Lewis	\$ 2,864.43	\$106.19	40.9	\$ 259.50	10	\$ 25.95	03/18	3/14
8	11044	BAGRB100	Bage Brothers	Mike Hughes	\$ 4,444.34	\$ 72.00	41.7	\$ 172.48	5	\$ 34.99	01/01	1/14
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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

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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)

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227	10323 414	1	Wraps Unlimited In	с.		Paul Lewis		s	64.24	\$ 1	1.97	47.4	\$	25.	.26	1	\$ 25	.26	04/21	/13
228	10726 242	3	X-Treme Vehicle De	rsign		Wallace Se	emper	\$	31.33	\$	5.75	26.8	\$	21.	.49	1	\$ 21	.49	05/15	/13
229	10756 YEL	LO100	Yellow County Scho	ols		Graham Br	onson	\$	7,347.39	\$ 7	0.78	60.7	\$	116.	.67	3	\$ 38	.89	03/21	/14
230	10756 YEL	LO100	Yellow County Scho	ols		Mike Hugh	ies 👘	\$	7,347.39	\$18	8.57	60.6	\$	311.	.12	8	\$ 38	.89	02/13	/14
231	10619 YM	CAM4386	YMCA - Marshall			Bob Stanle	iy .	\$	5,885.89	\$29	5.80	47.581	\$	621.	.68	19	\$ 32	.72	417	08
232	10471 BO	WTI100	Bowtie Express			Wallace Se	emper	\$												2.45 C
233	10927 CO	UCH100	Couch Cleaning			Wallace Se	emper	\$												
234	10893 DA	MEE100	Dame Ediths Massa	ge Parlor		Wallace Se	emper	\$												
235	10868 DR	EAM100	Dreammaker Spong	e		Wallace Se	emper	\$	-											

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.



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)

24	А	В	С		D		E	F	G	н	1	J	K
1	Cust ID 💌	Cust Acct 💌	Customer Name	ΨÎ	Salesman	" T	Total Sales	GP 💌	GP% 🔻	ItemCatSales	• Qty •	AvgPrice 💌	LastSaleDate 💌
138	11142	INWUL4643	Indiana Wesleyan Univ/Lexington		Geoff Jonas		\$ 5,868.70	\$ 45.87	30.493	\$ 150.4	3 7	\$ 21.49	41702
139	10271	3721	Indiana Wesleyan Univ/Louis		Geoff Jonas		\$ 1,289.01	\$142.40	31.554	\$ 451.3	9 21	\$ 21.49	41497
142	10930	4489	Indianapolis Public Schools		Geoff Jonas		\$ -						
145	10161	3030	Infrastructure Contractors Inc		Geoff Jonas		\$ 155.23						
149	10616	2891	Integrator.com, Inc		Geoff Jonas		\$ 365.80	\$ 76.13	37.7	\$ 202.0	8 8	\$ 25.26	05/22/13
151	10616	2891	Integrator.com, Inc		Geoff Jonas		\$ 365.80						
153	10434	4329	ISU/Parsons Hall		Geoff Jonas		\$ -						