
Customer Comparison Report

Welcome

Thank you for your recent purchase of BSoft Integrators' Customer Comparison Report. We take pride in our products as well as our customer service, so if you have any questions regarding the operation of your new software application that have not been addressed in this manual, please feel free to contact us at ken@bsoftintegrators.com.

Welcome to the Product Build Report!

Overview

The Customer Comparison Report is used to show customer activity in a side-by-side comparison. It has the ability to filter customers by category and sales representative. It can also run reports across multiple company files in order to compare different periods.

Installation

Please refer to the BSoft Installation Instructions document, for step by step instructions on the downloading and installation process for this application. The instruction manual is available on the BSoft Integrators' website, at www.bsoftintegrators.com

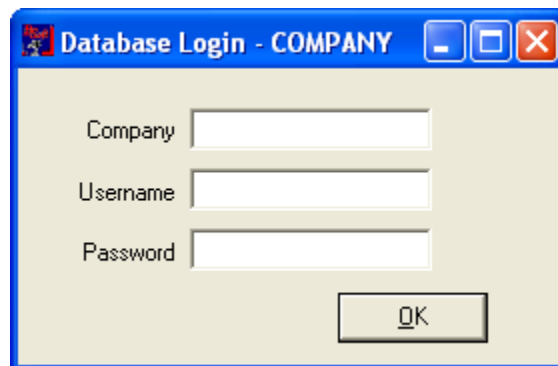
Program Requirements

This program work in conjunction with Excel 2003 or newer.

Setup

The installer will put a shortcut into your desktop. If you wish to launch it manually – the default install puts a shortcut into the Start→All Programs→CustCompRpt.

Once the application is installed and (if necessary) registered – you will be prompted to log into BusinessWorks.



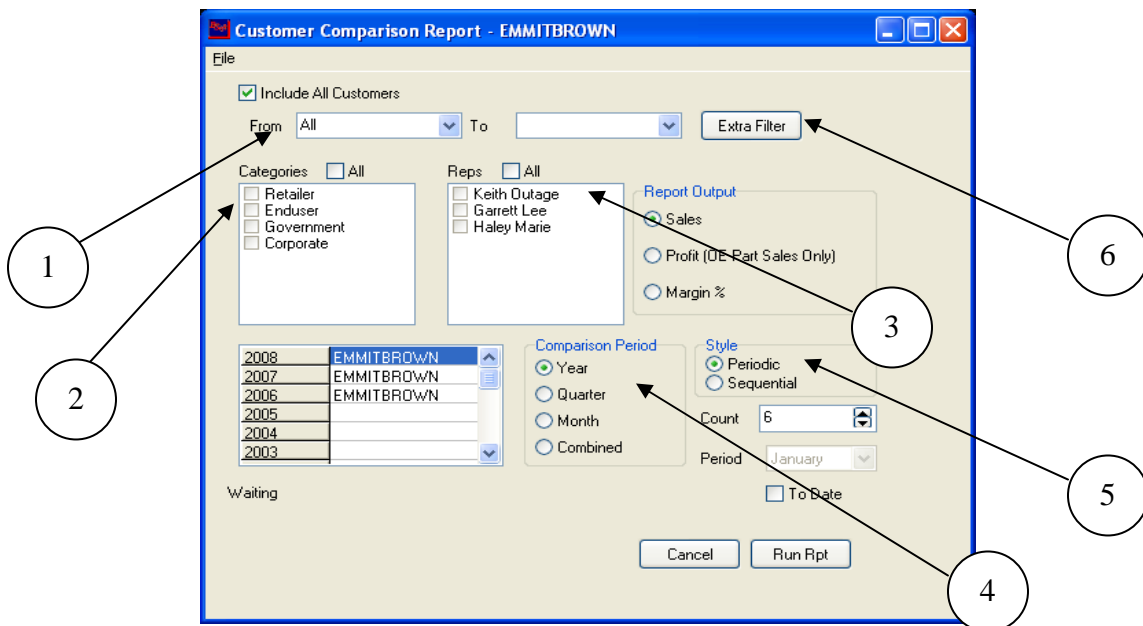
You must login using the Manager username and password. *This information is saved in encrypted form on your computer, so that re-entry of the information is not required on this computer.*

Once the system is connected, the application will show up on the screen as the company information that is selected.

Report Options

When running the Customer Comparison Report there are several options that must be selected; these options will determine which customer data is retrieved and used to generate the report as well as the way the report is presented. Each option and its alternatives are identified and discussed below.

- 1) Customers: This filter gives you the ability to filter your customers by either checking the box to include all customers, or use the drop down menus to select a range of customers, for which you want data.
- 2) Categories: This filter gives you the ability to run the report for all customer categories, or specific categories (as established in BusinessWorks); these include: Retailer, Enduser, Government or Corporate.
- 3) Representatives: This filter is similar to the category filter in that you can choose to include all sales representatives or select certain representatives.



- 4) Comparison Period: From this filter you are able to decide what type of data you want to review, be it monthly, quarterly, yearly, or combined. Based on the data type, you can then choose a specific data set; i.e. a specific month or quarter, as well as the specific number of periods you want included.
- 5) Style: The style filter addresses whether the selected periods are compared periodically (i.e. January to January) or sequentially (i.e. January to February).

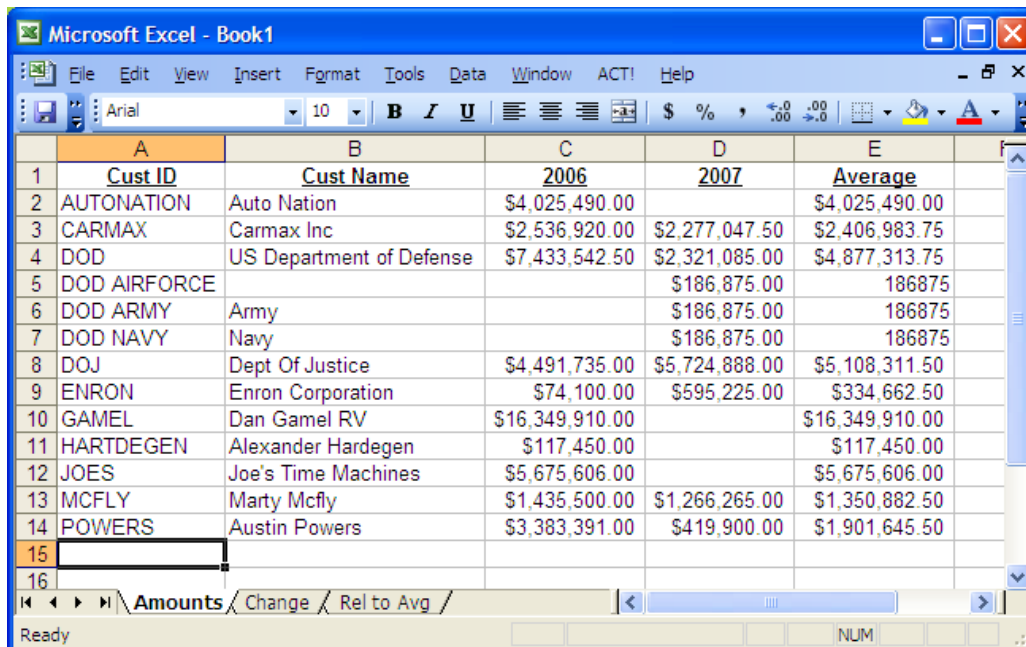
- 6) **Extra Filter:** This feature is used to select customers based on custom fields (i.e. **XXXXXX**)

After selecting the appropriate filter options for your comparison report you click on the “Run Rpt” button. The selected data set will be exported into an Excel workbook.

The Report

Once you have selected to “Run Rpt” the data will be compiled and exported into an Excel workbook. As you review the workbook, you will find three worksheets (tabs): Amounts, Change, and Rel to Avg. Each of these worksheets contains a different manipulation of the selected data.

- Amounts Worksheet:** This report provides the sales totals for the period type that has been selected, and the number of periods chosen. In addition to the period totals it calculates a period “average” for the customer.



	A	B	C	D	E
1	Cust ID	Cust Name	2006	2007	Average
2	AUTONATION	Auto Nation	\$4,025,490.00		\$4,025,490.00
3	CARMAX	Carmax Inc	\$2,536,920.00	\$2,277,047.50	\$2,406,983.75
4	DOD	US Department of Defense	\$7,433,542.50	\$2,321,085.00	\$4,877,313.75
5	DOD AIRFORCE			\$186,875.00	186875
6	DOD ARMY	Army		\$186,875.00	186875
7	DOD NAVY	Navy		\$186,875.00	186875
8	DOJ	Dept Of Justice	\$4,491,735.00	\$5,724,888.00	\$5,108,311.50
9	ENRON	Enron Corporation	\$74,100.00	\$595,225.00	\$334,662.50
10	GAMEL	Dan Gamel RV	\$16,349,910.00		\$16,349,910.00
11	HARTDEGEN	Alexander Hardegen	\$117,450.00		\$117,450.00
12	JOES	Joe's Time Machines	\$5,675,606.00		\$5,675,606.00
13	MCFLY	Marty Mcfly	\$1,435,500.00	\$1,266,265.00	\$1,350,882.50
14	POWERS	Austin Powers	\$3,383,391.00	\$419,900.00	\$1,901,645.50
15					
16					

- **Change Worksheet:** This report shows the change in data from one period to another and allows for the identification of sales patterns. In addition to showing the period changes it also calculates an “average” change over all of the active periods.

	A	B	C	D	E
1	Cust ID	Cust Name	2006	2007	Average
2	AUTONATION	AUTONATION		(%100)	
3	CARMAX	CARMAX		(%10)	%6
4	DOD	DOD		(%69)	%110
5	DOD AIRFORCE	DOD AIRFORCE			%0
6	DOD ARMY	DOD ARMY			%0
7	DOD NAVY	DOD NAVY			%0
8	DOJ	DOJ		%27	(%11)
9	ENRON	ENRON		%703	(%44)
10	GAMEL	GAMEL		(%100)	
11	HARTDEGEN	HARTDEGEN		(%100)	
12	JOES	JOES		(%100)	
13	MCFLY	MCFLY		(%12)	%7
14	POWERS	POWERS		(%88)	%353
15					
16					

- Rel to Avg Worksheet:** This worksheet displays each year's results relative to the customer's average.

	A	B	C	D	E
1	Cust ID	Cust Name	2006	2007	
2	AUTONATION	AUTONATION	%0	(%100)	
3	CARMAX	CARMAX	%5	(%5)	
4	DOD	DOD	%52	(%52)	
5	DOD AIRFORCE	DOD AIRFORCE	(%100)	%0	
6	DOD ARMY	DOD ARMY	(%100)	%0	
7	DOD NAVY	DOD NAVY	(%100)	%0	
8	DOJ	DOJ	(%12)	%12	
9	ENRON	ENRON	(%78)	%78	
10	GAMEL	GAMEL	%0	(%100)	
11	HARTDEGEN	HARTDEGEN	%0	(%100)	
12	JOES	JOES	%0	(%100)	
13	MCFLY	MCFLY	%6	(%6)	
14	POWERS	POWERS	%78	(%78)	
15					
16					

