

# Customer Comparison Report

2008

## Why you need this:

- You want to know your customers' spending habits
- You want to identify sales patterns
- You need to know how your sales associates are performing
- You want to know which customers are profitable and which are not
- You need to forecast sales for budgeting purposes

**PROGRAM REQUIREMENTS:**  
**EXCEL 2003 or NEWER**



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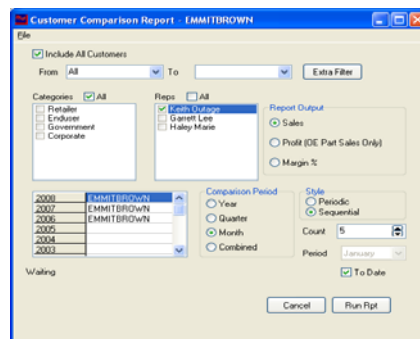
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## Improved Customer Profitability in Sage BusinessWorks

BSoft's Customer Comparison Report gives you a detailed picture of your sales history.

You want to know what your customers are spending so that you can better serve them! Run a Customer Comparison Report for the desired customer base, time period



and comparison periods. You get a detailed picture of individual customer spending per period, period in total, and the change from one period to the next, in your chosen output; Sales \$\$, Profit, or Profit Margin.

### Identify Sales Patterns!

Use the "Change" sheet of the report to view the change in customer purchasing from one period to another.

### Identify customers with

minimal

### profit margins! Use

the "profit margin" output, identify the customers that have the highest and lowest profit margins, and address the issue.

### Compare

### sales based on Sales Representative!

Use the Customer Comparison Report to monitor sales and sales profits by Sales Representative.

### Forecast Sales!

Use your past sales and profitability to better

forecast your future, prepare budgets, make pricing adjustments, and focus your attention on serving your chosen customer base.

| Cust ID | Cust Name   | August, 2007 | September, 2007 | October, 2007 | November, 2007 | December, 2007 | Average |
|---------|-------------|--------------|-----------------|---------------|----------------|----------------|---------|
| 2       | DOD ARFORCE | \$7,206.00   | \$18,574.31     | \$6,372.54    | \$9,523.14     | \$16,735.00    | 11680   |
| 3       | DOD ARMY    | \$7,360.00   | \$7,362.15      | \$7,216.54    | \$136.26       | \$621.75       | 4536.1  |
| 4       | DOD NAVY    | \$6,150.00   | \$31,215.41     | \$17,521.01   | \$42,561.98    | \$51,624.85    | 29815   |
| 5       | POWERS      | \$3,200.00   | \$1,597.52      | \$894.32      | \$126.75       | \$15.98        | 1186.9  |
| 6       | TOTAL       | \$23,905     | \$68,739        | \$32,104      | \$52,347       | \$69,988       |         |

| Cust ID | Cust Name   | September, 2007 | October, 2007 | November, 2007 | December, 2007 |
|---------|-------------|-----------------|---------------|----------------|----------------|
| 2       | DOD ARFORCE | 150%            | (6%)          | 49%            | 76%            |
| 3       | DOD ARMY    | 0%              | (2%)          | (8%)           | 360%           |
| 4       | DOD NAVY    | 408%            | (44%)         | 143%           | 21%            |
| 5       | POWERS      | (50%)           | (38%)         | (87%)          | (87%)          |
| 6       | TOTAL       | 146%            | (45%)         | 63%            | 32%            |

| CHALLENGE   | SOLUTION                                   | RESULTS   |
|---|--|---|
| Efficiently monitor your sales and profitability by customer, and effectively utilize this information to make informed sales decision. | Install BSoft's Customer Comparison Report | More informed decision making, better utilization of resources, more effective customer service, and increased profitability. |