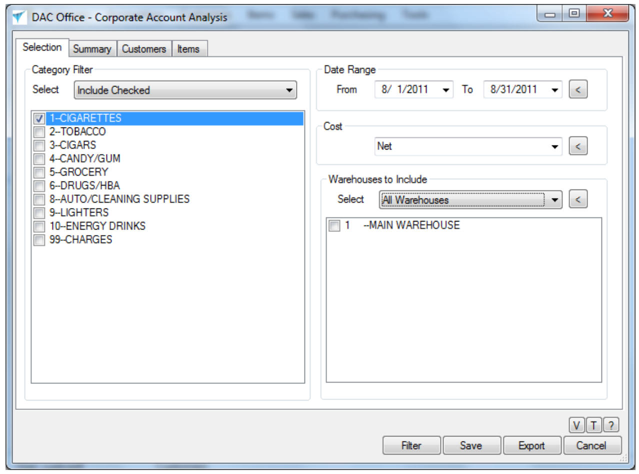
DAC Office
Corporate Account Analysis

Overview

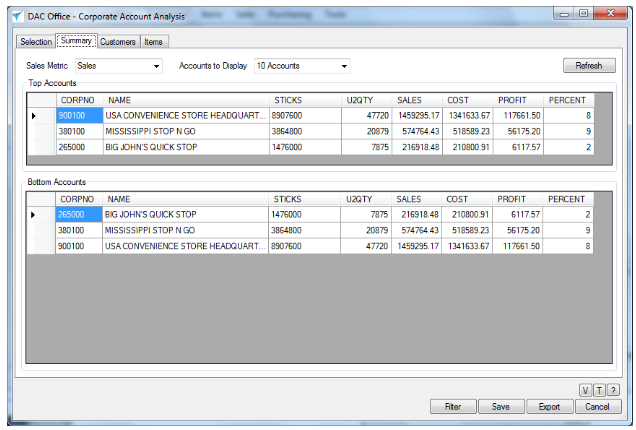


The Corporate Account Analysis shows performance of corporate customers. Use the Category filter to include or exclude certain categories. Enter a date range and cost for the analysis, use the "<" button to pull information from the global filter. Select all warehouses or check off only those warehouses to include.

Click on the filter button at the bottom of the screen to see the DAC Office global filter screen.

Click the Save button to save your changes.

Summary Tab



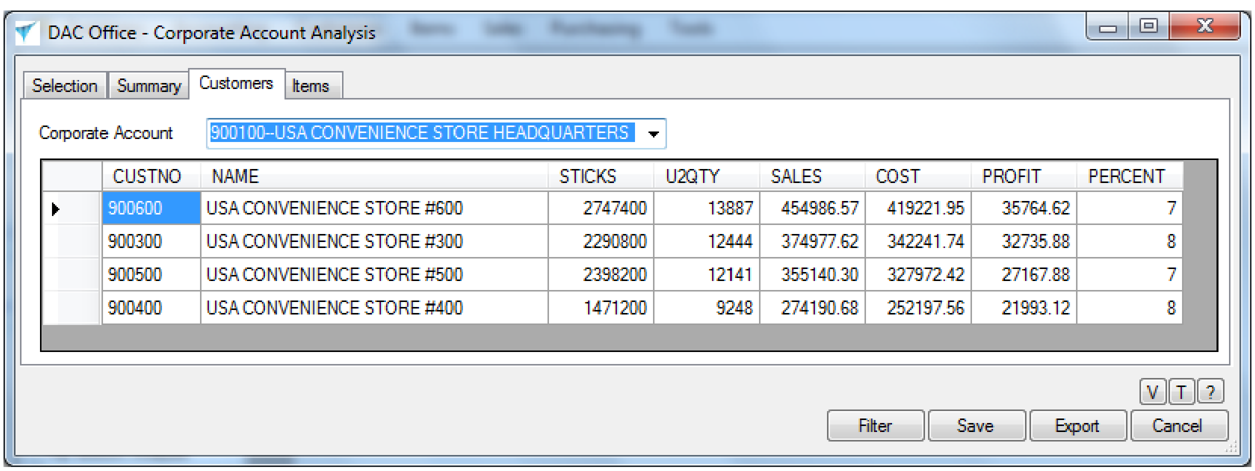
Click on the "Summary" tab to see the top and bottom corporate accounts according to the selected metric. Select the metric from the drop-down list and the number of accounts to display. Click the Refresh button to refresh the grid data.

In the example screen 3 customers are listed in the "Top Accounts" section and the same 3 customers are listed in the "Bottom Accounts" section. This is because we only have 3 corporate accounts set up on our test box. Normally, you will see different accounts in these two grids.

Double-click a corporate account to review the customers of that account.

Customers Tab

Select a corporate account from the drop-down box to review the customers of the selected account.



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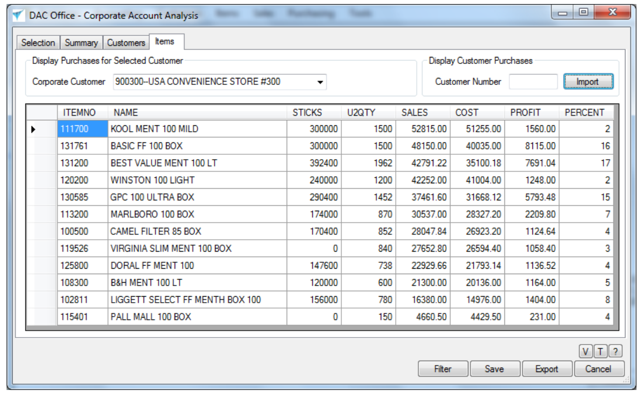
Items Tab

Click on the “Items” tab and select the customer from the drop-down list to review the items purchased by the customer during the selected date range. Click the import button to show the items in the grid. A customer number could also be entered in the provided box instead of selecting it from the drop-down box.



Export to Excel

Click on the Export button to export the data to Excel.