

## Accounting & Technical Support For Petroleum Marketers!

We've added a new report, called a Honeymoon Analysis. Here's a piece of one, run for 9 months:

CUST	CUSTOMER NAME	WH	SM	FUEL SALES	FUEL FLAGS	LUBE SALES	LUBE FLAGS	C/L SALES	C/L FLAGS	DTC
28525	C.D. MARROWS, INC.	10	1	58,944	YYYYYYYY	3,379	YYYY_YYY			5.8
28580	BAYTEX CATTLE COMPANY	4	2	676	_Y_Y_					-13.0
28585	CHARLES WOLFER JR.	4	2	16,634	YY__YYY	947	_YYYY_YYY			35.2
28540	CALIFORNIA CONCENTRATE COMPA	1	2							
28520	CALIFRESH OF CALIFORNIA LLC	4	2	627	Y_____					55.0
28565	HENDRICKSON TRUCKING INC.	4	2					1,508	_YYYYYYYY	23.7

The idea is to scan accounts that were added a certain number of months ago, and give a quick overview of how they've turned out. The report can run for 3 to 12 months, and we sum dollar sales for that period for Fuels, Lubes, and Cardlock. We include a "Flag" column to show the activity pattern for each of those categories to show if the accounts have been consistently, or sporadically active. In the report above, the flags run from Sept 2003 on the left to May 2004 on the right, the nine month period after these accounts were added.

The final column is days to collect based on the due date, shorthand for credit quality.

Looking at the sample one can see, in the 4<sup>th</sup> line an account that never even purchased. The 1<sup>st</sup> line shows a steady, high-volume account. The 5<sup>th</sup> line shows an account that dabbled and left.

This report can also be run without regard to just accounts added in the target month and instead run for all older ones as well. That makes for a longer report, perhaps best suited for a single sales rep, that becomes a different kind of Sales Analysis, with an emphasis on showing patterns, rather than lots of raw data.

Cost to install: 1.5 hours.