

13 Month Card Spend Analysis

- From WORKS go to: Reports > Create
- Select the following Category and Template

* Category: Spend ▼

* Template: 13 Month Card Spend Analysis ▼

- Output Format will default to CUSTOM. This should not be changed
- Submit Report
- When report is “Ready”, open [CUSTOM](#)

Report Name	Status	New	
<input type="text"/>			
13 Month Card Spend Analysis	Ready	✓	CUSTOM

- The report will open as a TXT file. Select File > Save As and save this TXT file to access later.
- Open Microsoft Excel, go to DATA, then click From Text.
- Locate and select your TXT file.
- Click Import
- In the Text Import Wizard, Step 1, select Delimited, then click Next.

- In the Text Import Wizard, Step 2, select the checkbox for Comma.

Text Import Wizard - Step 2 of 3

This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

Delimiters

☐ Tab
☐ Semicolon
☒ Comma
☐ Space
☐ Other:

☐ Treat consecutive delimiters as one

Text qualifier:

Data preview

- Click Next
- Click Finish
- Click OK
- Report will display Cardholder Name, Card Profile, Months w/Spend, and total spend per month for 13 consecutive months.

Months w/Spend	Max % Spend	Avg % Spend	Apr-18	May-18	Jun-18	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18	Dec-18	Jan-19	Feb-19	Mar-19	Apr-19
12	56%	31%	0	18904.91	12856.17	17135.26	32696.06	24994.45	55863.22	28308.13	48615.46	31074.39	34470.64	55511.75	13265.55
11	53%	19%	975.62	2668.14	0	802.43	0	2438.9	627.2	242.31	23.26	34.03	268.56	2373.37	103.19
0	0%		0	0	0	0	0	0	0	0	0	0	0	0	0
0	0%		0	0	0	0	0	0	0	0	0	0	0	0	0
0	0%		0	0	0	0	0	0	0	0	0	0	0	0	0
0	0%		0	0	0	0	0	0	0	0	0	0	0	0	0
12	9%	3%	118.18	1730.49	1902.2	2984.76	1755.93	4699.26	1132.46	516.07	4646.83	645.57	0	499.7	120
8	7%	1%	3316.34	0	0	318.62	69.14	0	60	267	0	16	450	0	136.9
10	83%	22%	6193.54	1390.29	1938.61	1734.1	413	1637.95	490.47	0	0	2347.36	457.08	147.63	0