13 Month Card Spend Analysis

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

* Category:	Spend V	
*Template:	13 Month Card Spend Analysis	\sim

- > Output Format will default to CUSTOM. This should not be changed
- Submit Report
- When report is "Ready", open <u>CUSTOM</u>

Report Name	Status	New	
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.

Text Import Wizard	- Step 1 of 3				?	;	×		
The Text Wizard has determined that your data is Delimited.									
If this is correct, choose Next, or choose the data type that best describes your data.									
Original data type									
Choose the file type that best describes your data:									
Delimited - Characters such as commas or tabs separate each field.									
			s separate cat	in neia.					
O Fixed width	- Fields are aligned	in columns with	spaces betwo	en each fiel	d.				
Fixed width	- Fields are aligned	in columns with <u>o</u> rigin: 437	OEM United	en each fiel States	d.		~		

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

Text Import Wizard -	Step 2 of 3	?	\times
This screen lets you se preview below.	et the delimiters your data contains. You can see how your text is affected	in the	
Delimiters			
<u>T</u> ab	_		
Semicolon	Treat consecutive delimiters as one		
Comma	Text gualifier:		
Space			
Other:			
Data preview			
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