



Decide with Confidence

## Using Frequency Component of the RFV (Recency, Frequency, Value) Functionality in a Selection:

In this selection, I want to see the number of customers who've purchased Optimizer in April or July of 2007.

I start by adding the following variables:

1. Product Cluster: Optimizer.
2. Month: April and July
3. Year: 2007

The screenshot shows a software interface for configuring a selection. The main window is titled "New Selection 10" and contains a tree view of the selection configuration. The tree view shows a hierarchy: "New Selection 10" (expanded) -> "Product Cluster AND Month AND Year" (expanded) -> "Product Cluster of OPTIMIZER" (selected) -> "AND Month of April or July" -> "AND Year of 2007" (selected).

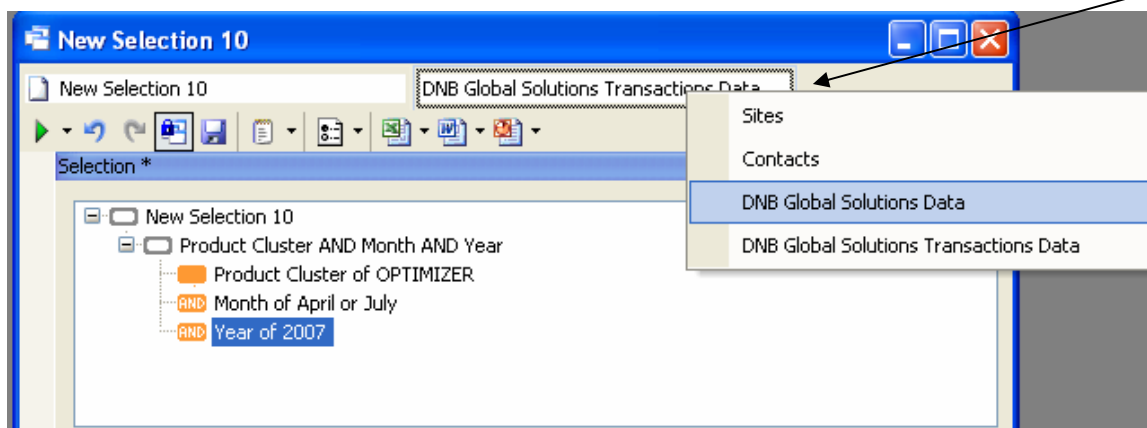
Below the tree view is a "Year" panel with a search field and a table of years. The search field contains "Description Co". The table has columns for "Include", "Code", "Description", and "DNB Global S...". The table data is as follows:

Include	Code	Description	DNB Global S...
<input type="checkbox"/>	!	Unclassified	0
<input type="checkbox"/>	1	2006	14,249
<input checked="" type="checkbox"/>	2	2007	7,850

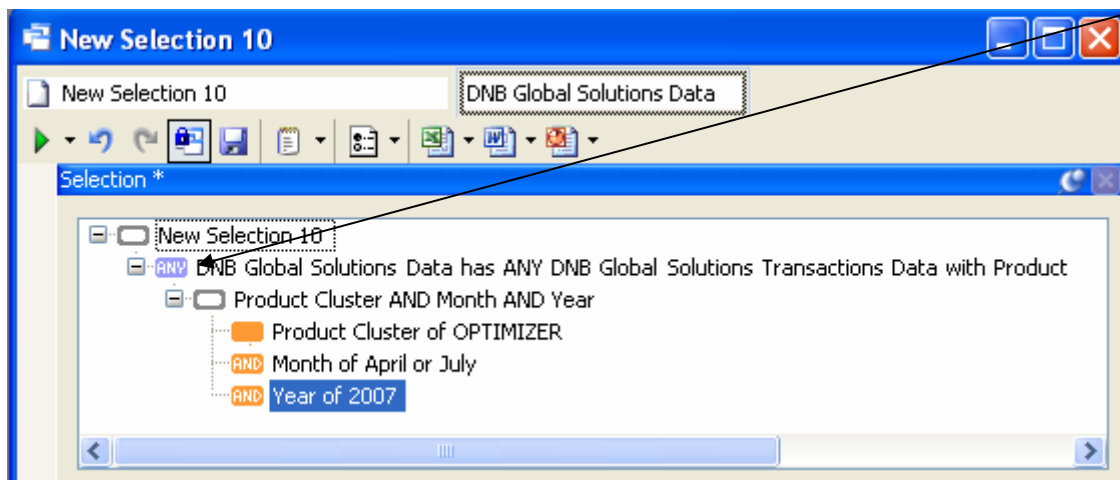
At the bottom of the interface, there is a "Cover" section with a "Selection \*" dropdown set to "Include", a "Product Cluster" dropdown, and a "Year" dropdown. The "Year" dropdown is currently set to "2007".



Note: To use the RFV tool, you will have to ensure you have an ANY node in your selection. You will achieve this by changing the resolve table from Global Solutions Transactional Data to the Global Solutions Data table. You right click on the box to the right of the Selection Name and select the appropriate table.



Note that the ANY node is now visible:

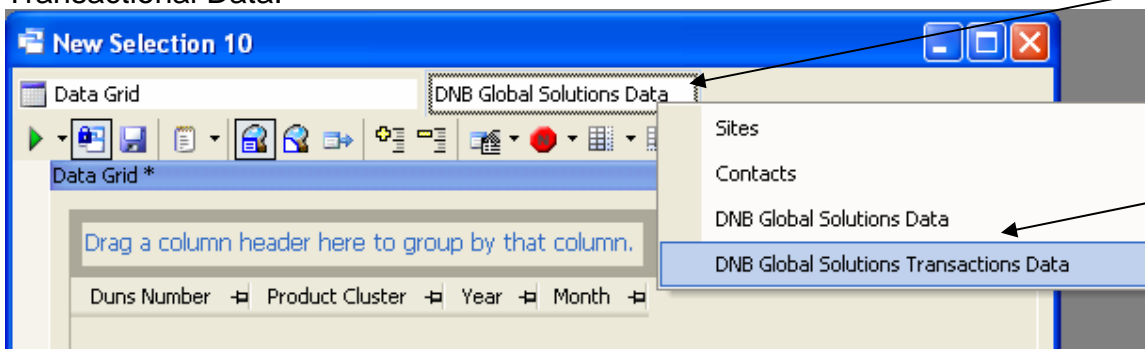



Now, I'll drop a Data Grid on top and add in the following variables:

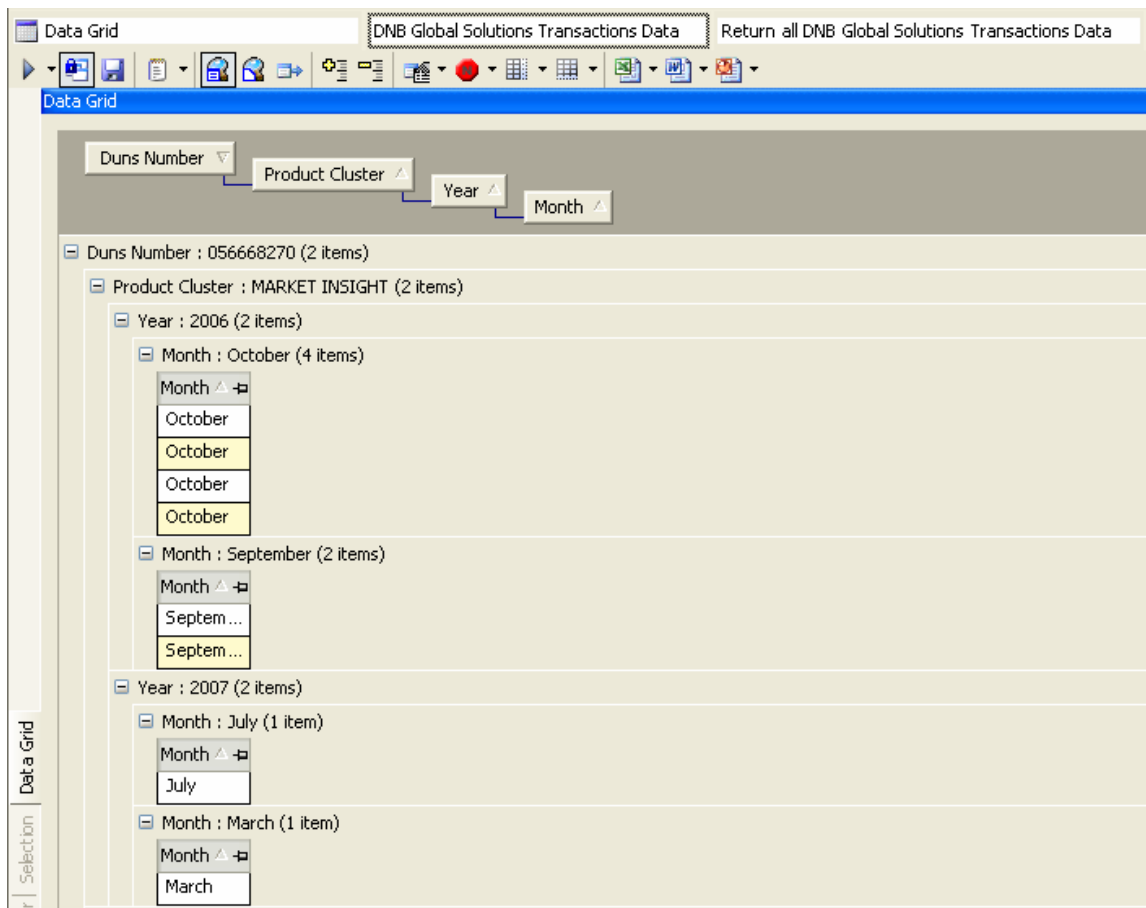
DUNS number, Product Cluster, Year and Month



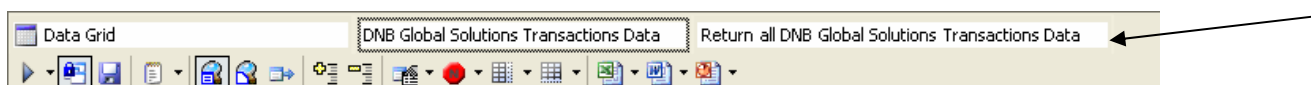
Note: The selection was based on the Customer data table (DNB Global Solutions Data). To view variables from the transactional table, I need to ensure I resolve to the transactional table on the data grid. To do that, I follow the same steps I did to change the selection resolve table, I simply right click on the box DNB Global Solutions Data and select DNB Global Solutions Transactional Data.



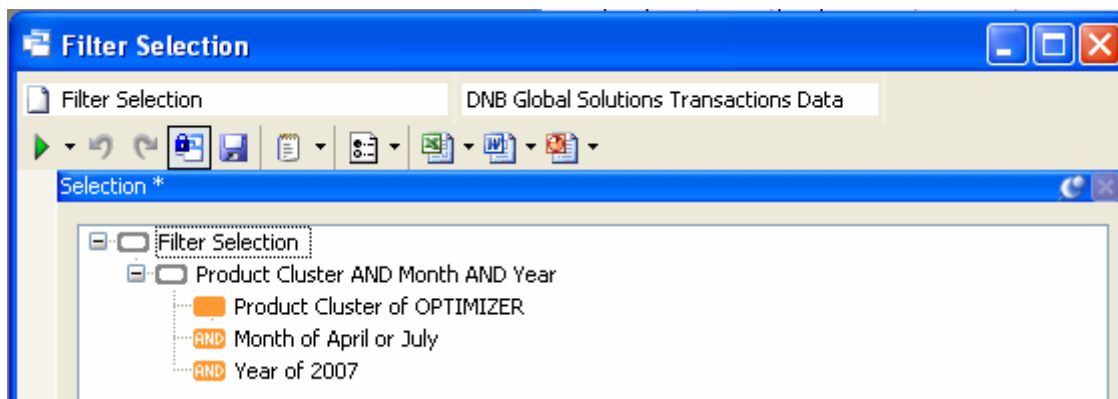
Then execute the request. Here is what my data grid looks like. I've grouped the data grid by DUNS number, by Product, by Year and by Month so it's easier to view. Click on the Expand All  button to view the data.



Note: The data is showing months and products outside the parameters I specified in the selection. That's because it's resolving to the transactional table so it brings back what you selected in your selection and all the other data. Notice the box to the right of the table identification box:



To limit the view to just the data you've selected in the selection, you will need to add a filter which is simply another selection that you will drop into that same box. For my filter, I'm going to include the exact same criteria as my original selection and name it Filter Selection:



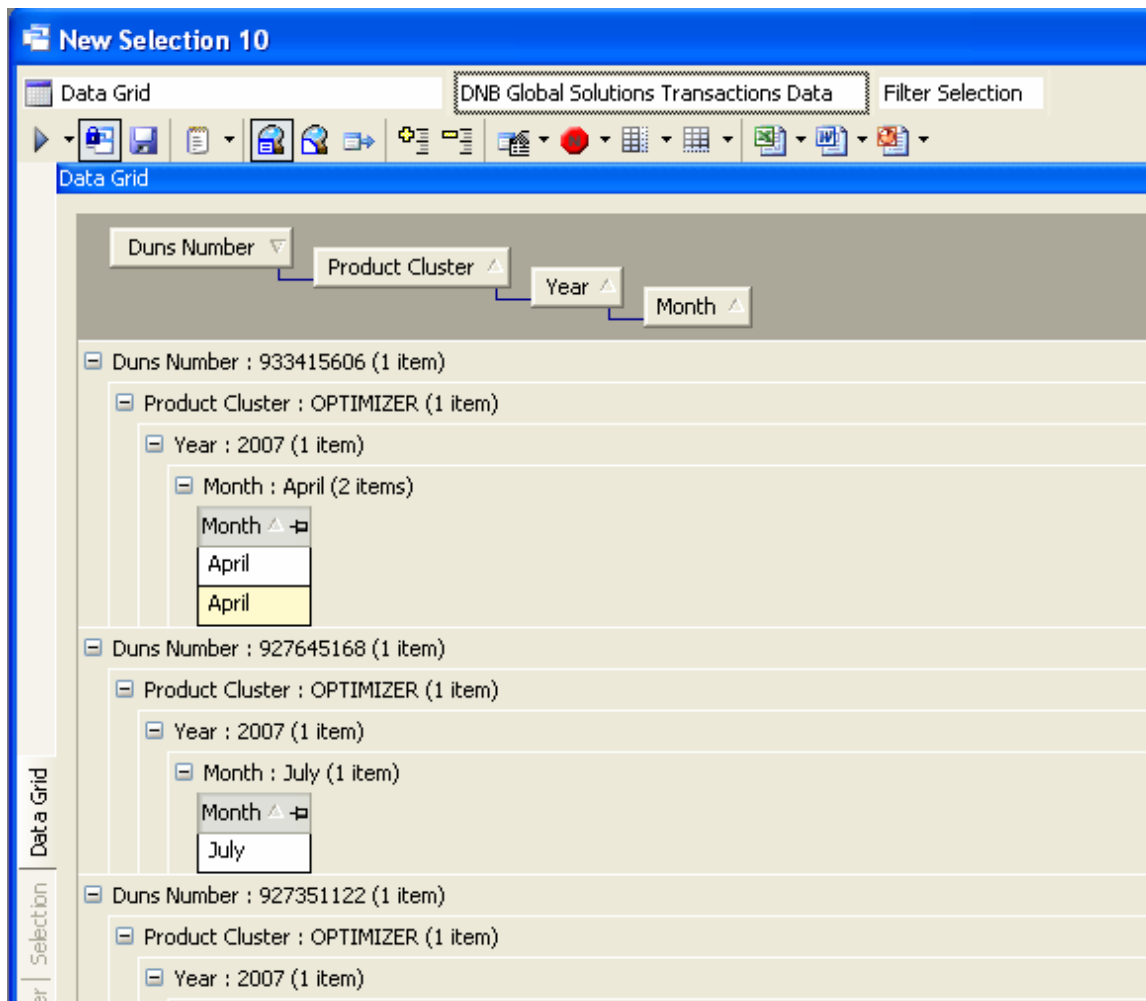
But this time, I will leave the resolve table as the DNB Global Solutions Transactions Data table because I want to see the transaction level data.

Now I will drag and drop this selection into the "filter" box.



Again, the purpose of adding this filter is to limit the results to: Optimizer sales in April OR July in 2007.

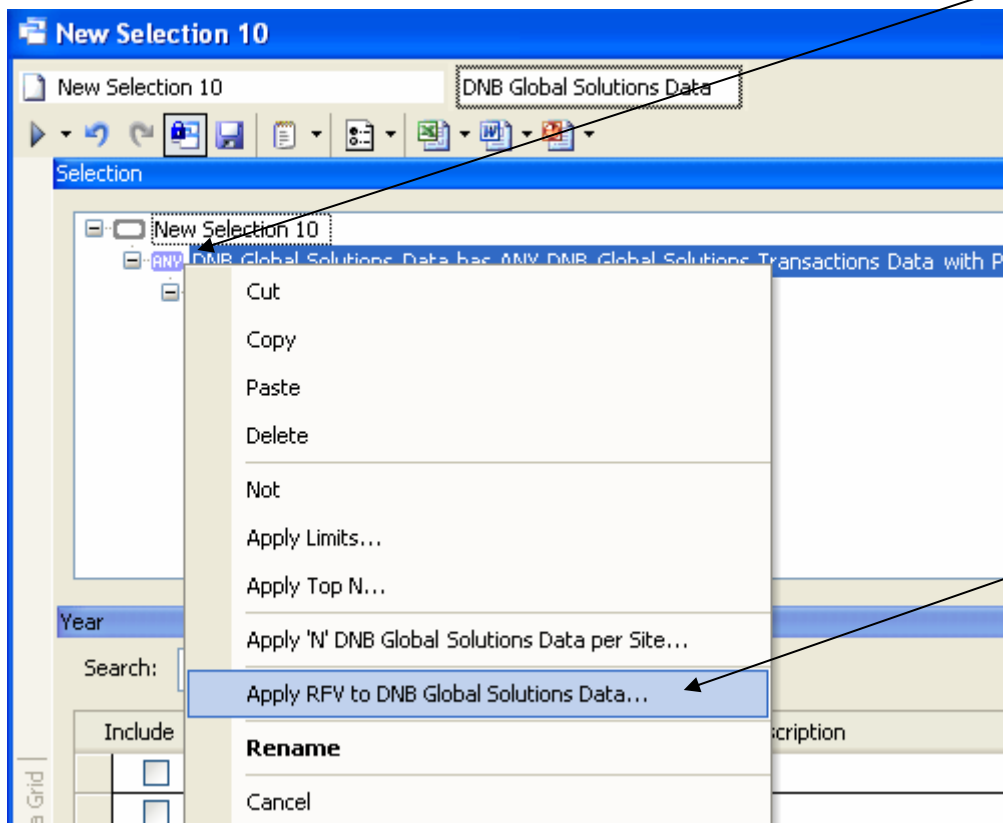
Now, when I rebuild the data grid, we will only see Optimizer sales in April OR July in 2007.



I can use RFV to show only customers with 6 or more Optimizer sales. In this case, the first two should no longer be in the result set.

I'll add an RFV so I can ask for customers who have greater than 6 Optimizer sales.

If I go back to the selection screen and right click on the ANY node and select Apply RFV to DNB Global Solutions Data:



It will now pop up a new window where I will choose Frequency and add in  $\geq 6$  and then click OK.



RFV

Grouping Table DNB Global Solutions Data

Transactional Table DNB Global Solutions Transac

Frequency \_\_\_\_\_

$>=6$

Recency \_\_\_\_\_

Drop your recency variable here First 1

Value \_\_\_\_\_

Sum

Drop your value variable here

Perform RFV after the Selection

Perform RFV before the Selection

OK Cancel

Now you will see an RFV indicator in your selection:

New Selection 10

New Selection 10 DNB Global Solutions Data

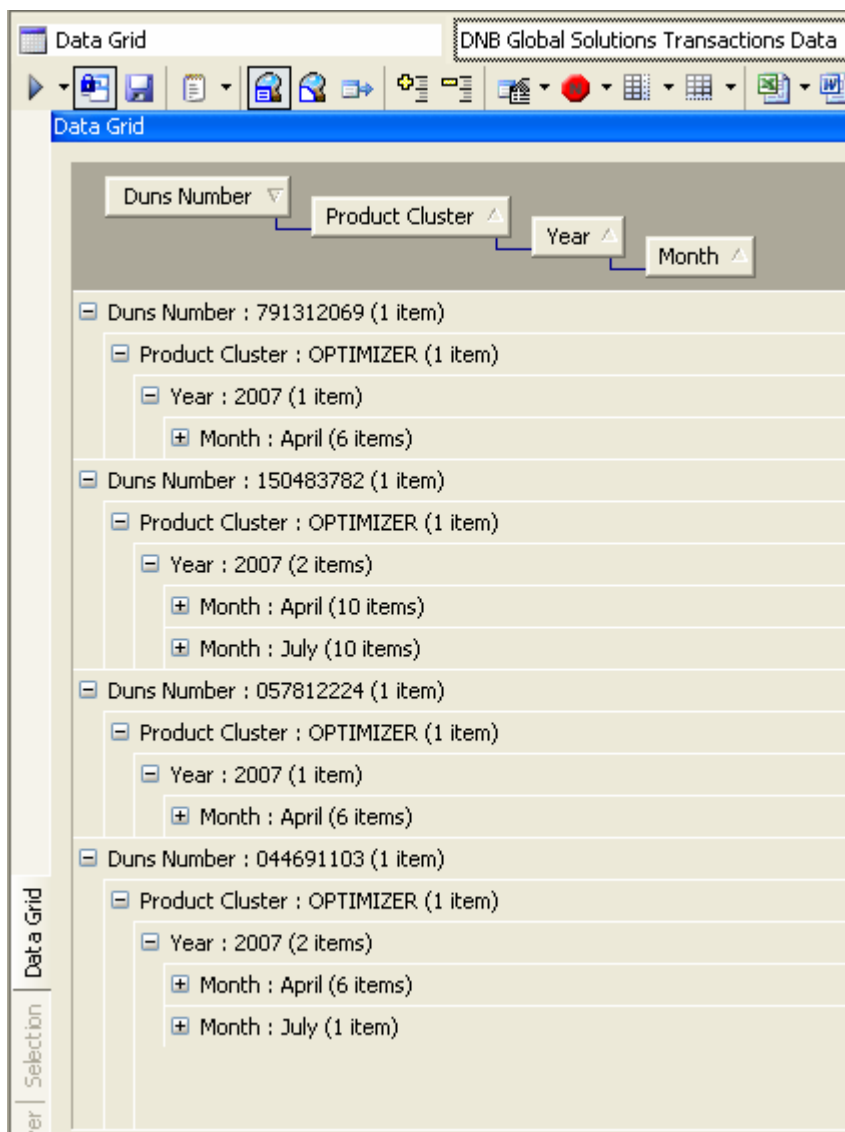
Selection \*

- RFV New Selection 10
  - Product Cluster AND Month AND Year
    - Product Cluster of OPTIMIZER
    - AND Month of April or July
    - AND Year of 2007





When I rebuild all pages I get the following results on my data grid:

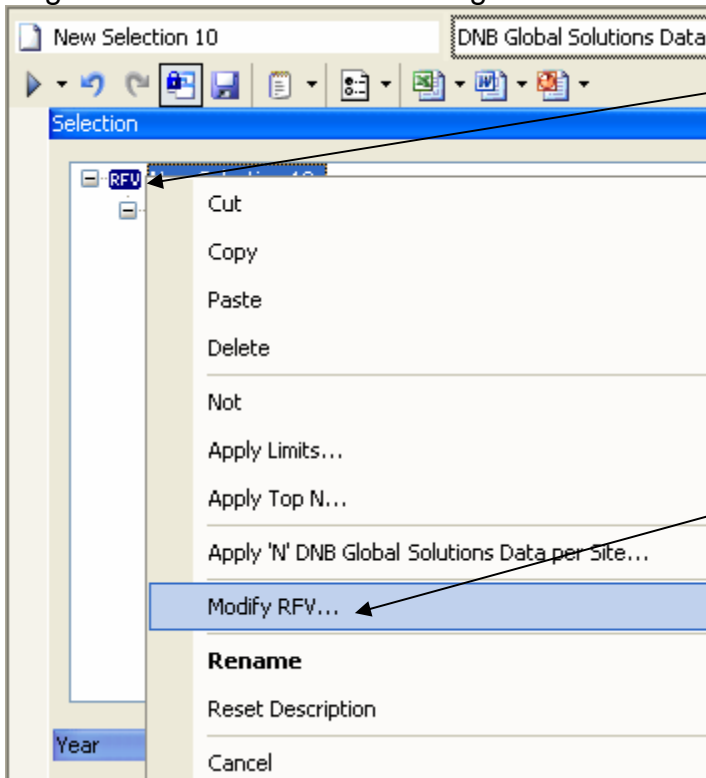


There were four DUNS numbers in my result set and each has at least 6 Optimizer sales in either April or July.

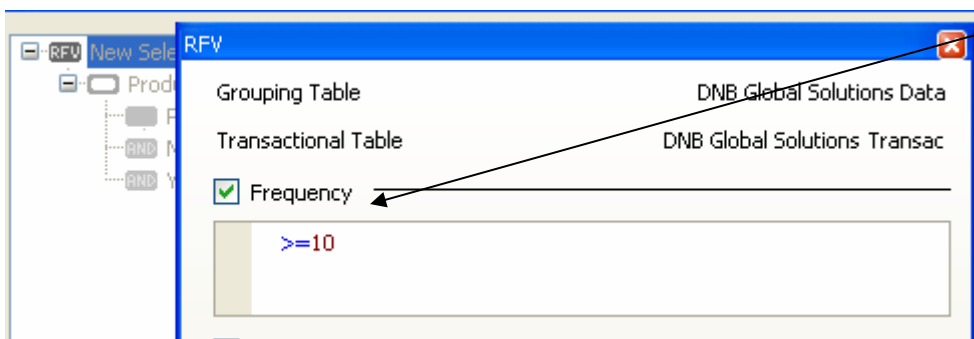


Let's see what happens when I change the RFV to  $\geq 10$ .

I'll go back to the selection and right click on the RFV node and select Modify RFV:

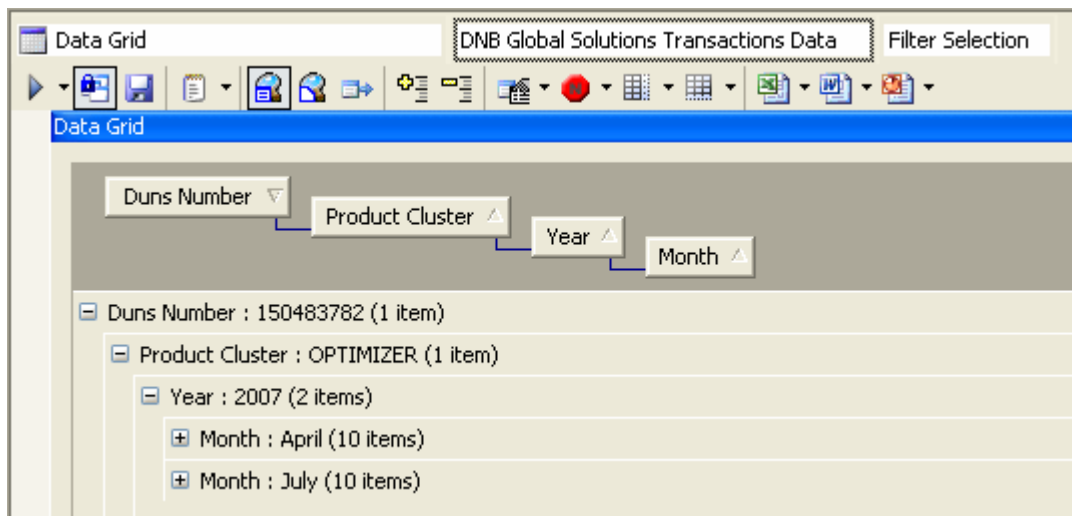


And change the frequency to  $\geq 10$





Rebuild all pages and let's look at the updated data grid:



There was only 1 DUNS number that met my criteria.