

## Unified Guide: Setting Up and Using RFM, ABC, and XYZ Analysis for Creatio

This consolidated guide provides step-by-step instructions for configuring and utilizing the integrated RFM, ABC, and XYZ analysis modules to segment your customers and products effectively.

### 1. Configure Lookups and Categories

The first step is to define the segmentation logic for each analysis type in the **Lookups** section.

#### 1.1. RFM Analysis (Customers)

Navigate to the **RFM Statuses** lookup and create your categories (e.g., *Silver, Gold, Platinum*). For each category, define:

- **Recency:** Days since the last purchase (From – To).
- **Frequency:** Number of purchases in the period (From – To).
- **Monetary Value:** Total spend in the period (From – To).

#### 1.2. ABC Analysis (Product Sales Contribution)

Navigate to the **ABC Statuses** lookup and create your classes (e.g., *Class A, Class B, Class C*). Define:

- **Quantity %:** Cumulative percentage of total units sold (From – To).
- **Amount %:** Cumulative percentage of total revenue (From – To).
- **Days:** Number of days since the product was last sold.

#### 1.3. XYZ Analysis (Demand Stability)

Navigate to the **XYZ Statuses** lookup and create categories (X, Y, Z). Define:

- **CV (Coefficient of Variation):** Ranges for demand stability (From – To).
- **Intermittency %:** Ranges for sales frequency/gaps (From – To).
- **Days:** Number of days since the last sale.

**Tip:** Ensure ranges do not overlap. The "N/A" status is system-reserved for cases with insufficient data.

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## 2. Order Status Control

To ensure accuracy, you must specify which orders the system should include in the calculations.

1. Open the **Order Status** lookup.
2. For statuses like "Completed" or "Delivered," enable the following checkboxes:
  - **Use in RFM**

- **Use in ABC**
- Use in XYZ

Orders without these flags will be ignored by the calculation engines.

### 3. Interface and Historical Tracking

Dedicated details have been added to track segment changes over time.

#### For Customers (RFM):

In the **Contacts** and **Accounts** sections, refer to the **RFM Segmentations** detail to see:

- Calculation Date.
- Assigned RFM Status.

#### For Products (ABC & XYZ):

In the **Products** section, navigate to the **ABC/XYZ Analysis** tab:

- **Current Indicators:** View the current ABC status and XYZ statuses (CV and Intermittency) directly on the page.
- **ABC Segmentation Detail:** Historical log of Amount and Quantity classes.
- **XYZ Segmentation Detail:** Historical log of CV, Intermittency, and assignment dates.

### 4. Built-in Processes and Automation

The system runs calculations automatically but allows for manual intervention.

Analysis Type	Automated Schedule	Manual Launch	Key Feature
RFM	Mondays at 01:00 AM	Supported	Select a specific calculation date in manual mode.
ABC	Daily at 02:00 AM	Supported	Immediately updates the Product page with the latest status.
XYZ	1st of every month at 02:00 AM	Supported	Daily updates for CV and Days; monthly for full history.

### 5. Utilizing the Results

### **Sales & Marketing (RFM)**

- **Retention:** Identify "Platinum" customers slipping into "Silver" based on increased Recency.
- **Targeting:** Run campaigns specifically for high-Frequency/low-Monetary segments to upsell.

### **Inventory & Forecasting (ABC/XYZ)**

- **Stock Optimization:** Ensure **AX** items (High revenue, Stable demand) are always in stock.
- **Dead Stock:** Identify items with high **Days** values to initiate clearance sales.
- **Replenishment:** Use **Z** categories to identify products that require manual ordering rather than automated forecasting due to irregular demand.