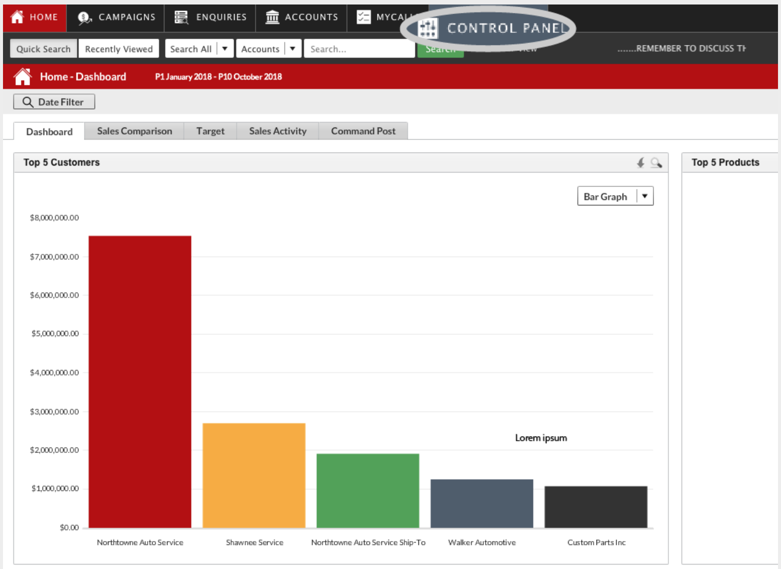
HOW TO CREATE A SNAPSHOT REPORT ON A SALESPERSON

This guide will show Power User's how to view a report on a sales person, which shows sales made to their customer base, product groups and products sold, along with information on any gaps in sales and sales variance.

Please note: These reports can be based on Customer Analysis, Product Analysis or Transaction Analysis fields pulled from your ERP system. We use the term 'Salesrep' but your field names may be called something different (e.g Rep/Territory).

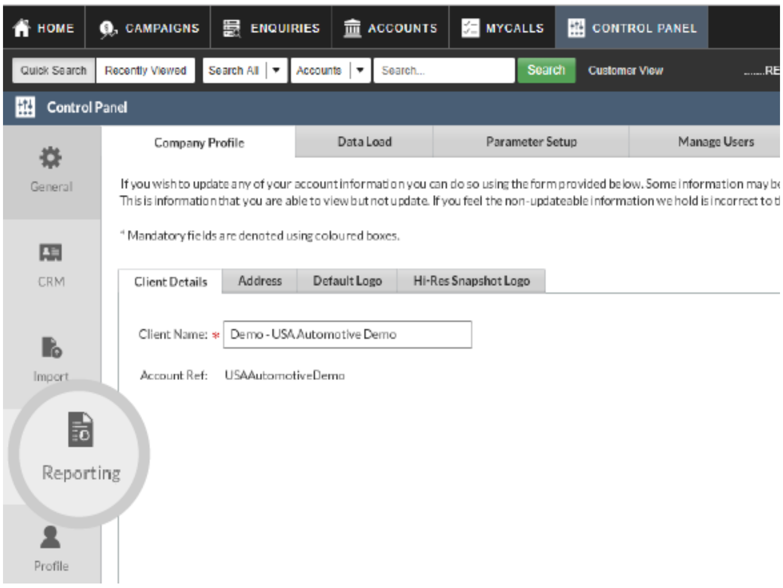
01

From the navigation bar at the top, select **Control Panel**.



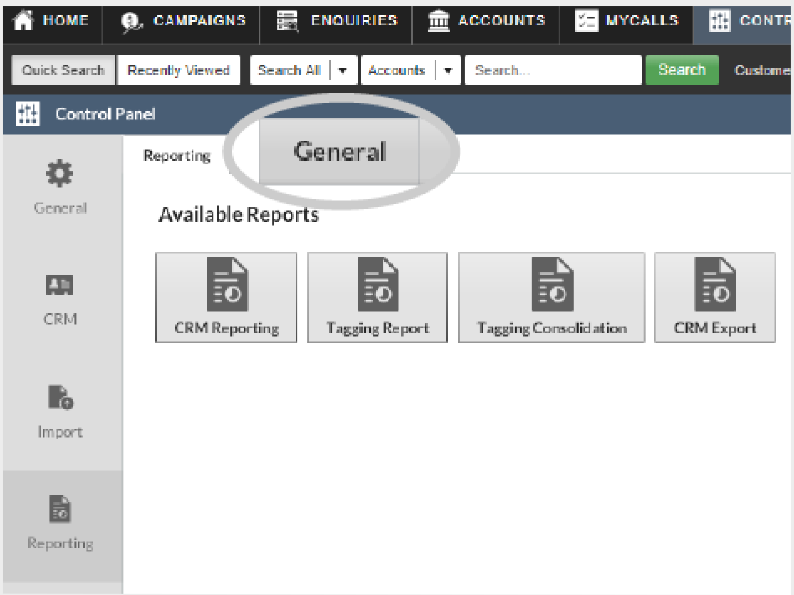
02

Click **Reporting**, from the left hand side.

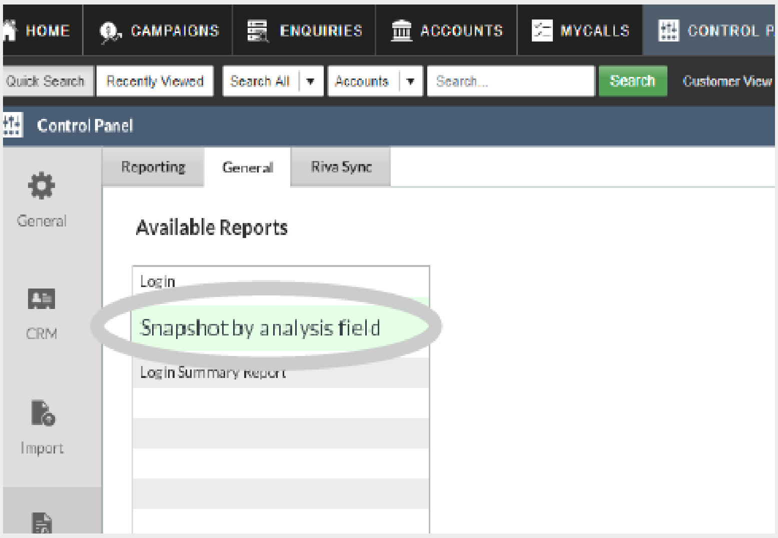


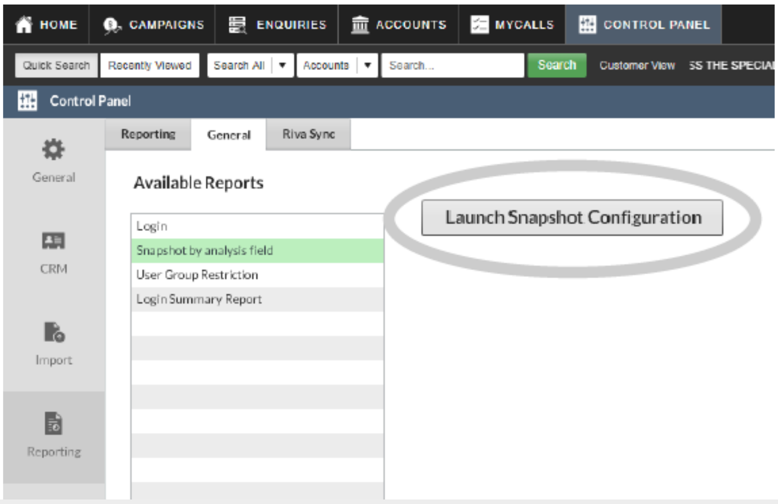
03

Next, click the **General** tab.



04 Select **Snapshot by analysis field.**

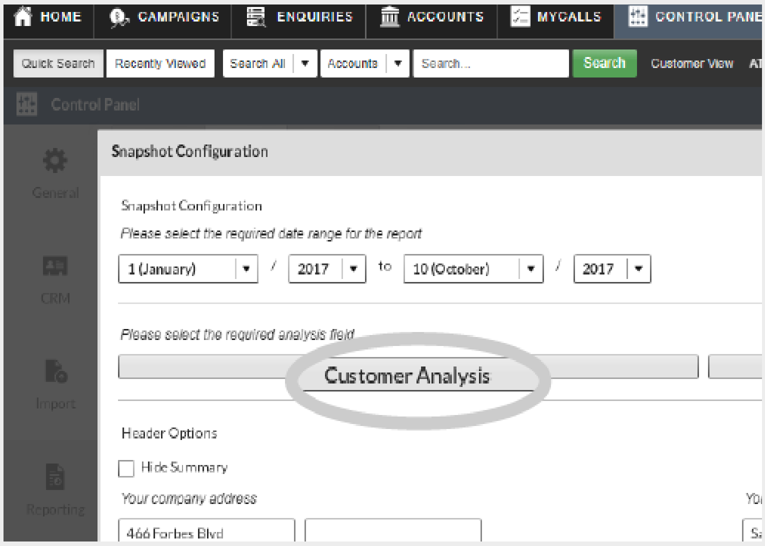


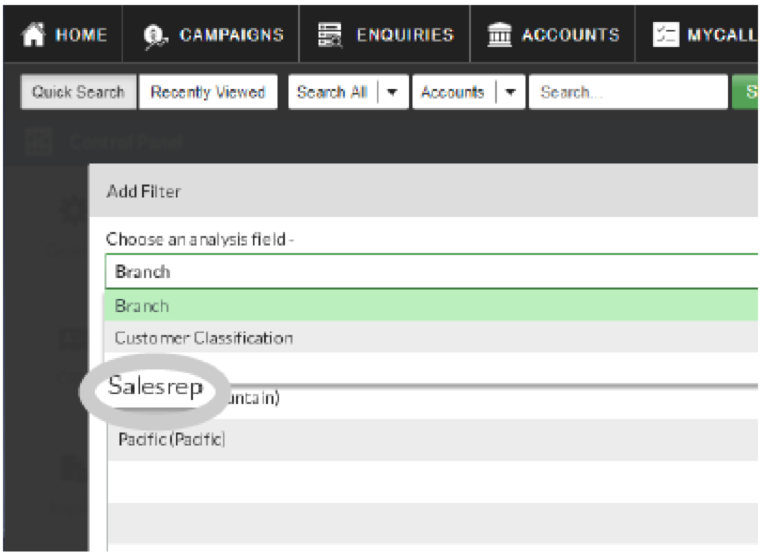


05 Click the grey **Launch Snapshot Configuration** button.

06 The Snapshot Configuration options pop-up box will now appear.

Click **Customer Analysis.**





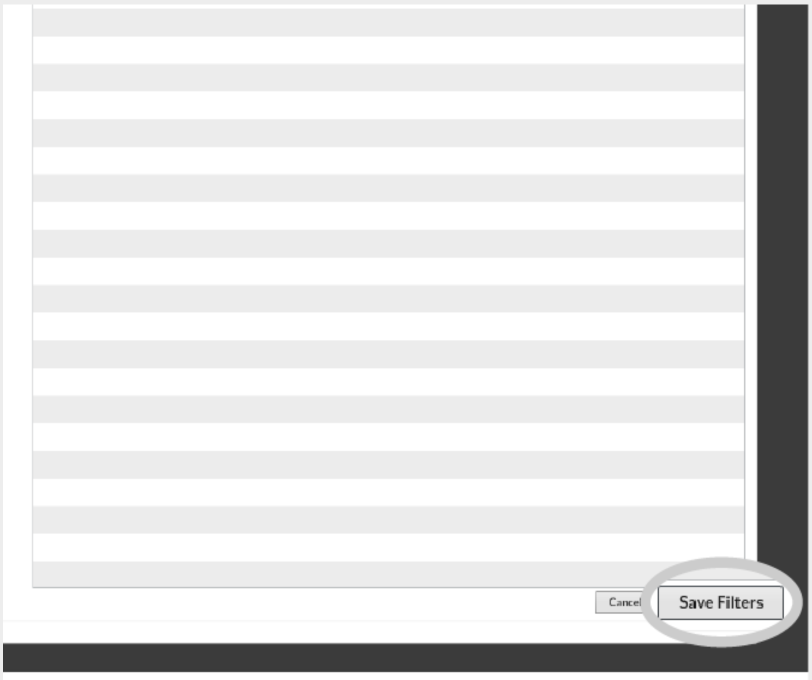
07 Next, select **Salesrep.**

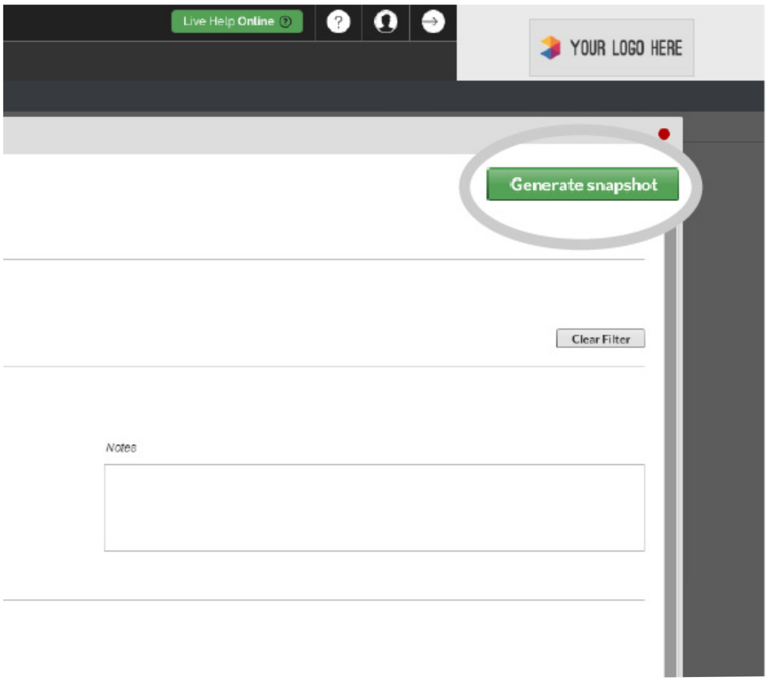
08 Now you need to select the sales rep who's snapshot report you would like to see.

To do so, double click on the name of the required sales rep so that they move across to the right hand column.

Finally, click the grey **Save Filters** button in the bottom right hand corner of the screen.

Please Note: You can only select one field at a time.





09 Now, select the green **Generate snapshot** button.

10 A pop-up box will now appear, press the grey **Export** button to download your pdf snapshot report.