sales-i SELL SMART

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How To Save An Enquiry

Desktop

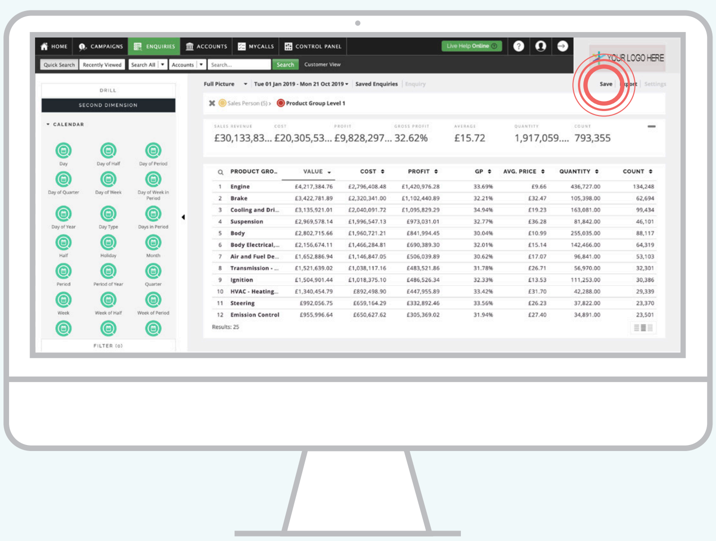
If you run an Enquiry on a regular basis, it may be useful to save it for future reference.

Saved Enquiries can automatically update to display the latest sales data – this is especially useful when you have an Enquiry with more complex parameters, such as multiple filters (i.e. three different products).

Your saved enquiries can be accessed and loaded from your Home page, saving you valuable time.

01 GENERATE REPORT

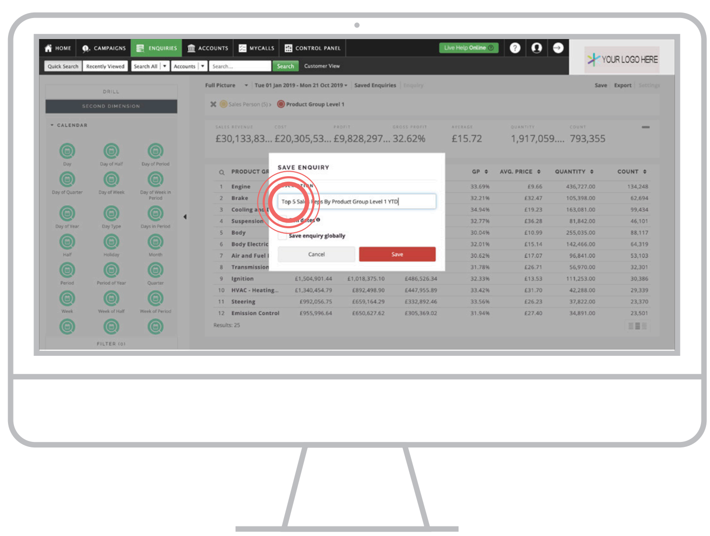
Once you have the Enquiry built how you require, click the Save button in the top right corner of the screen.



02 NAME ENQUIRY

Simply name the Enquiry you wish to save, ensuring this is something meaningful to the enquiry and explains what's included.

For example, Top 5 Sales Reps By Product Group Level 1 YTD.



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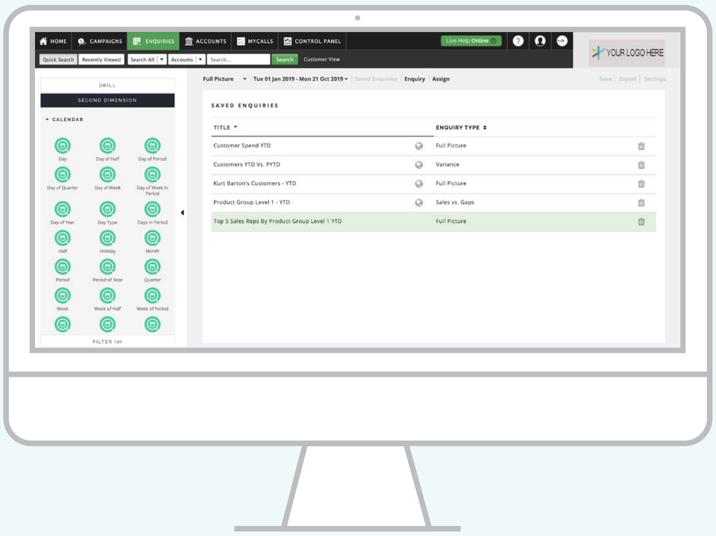
03 PERMISSIONS

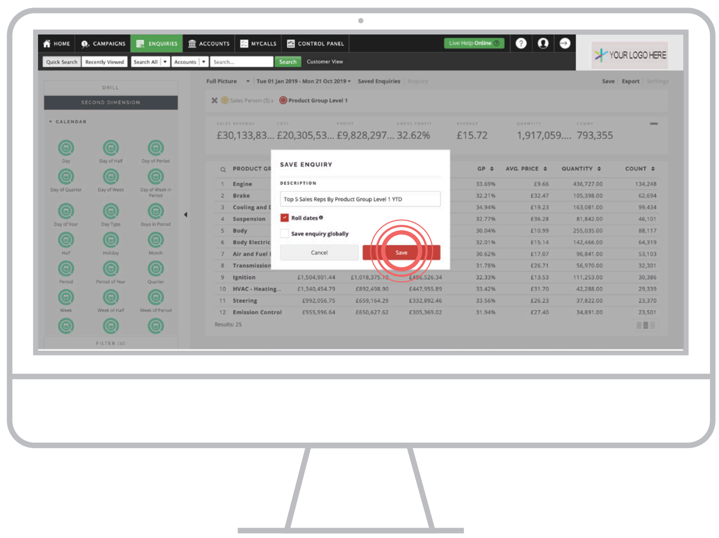
Select the Roll dates option should you want the report to be dynamic and the data kept up to date.

If you are a Power User, you will have the Save enquiry globally option to allow all other users to see and load the relevant results based on restrictions.



04 SAVE

Once set, click the Save button and your report is all saved, you can find this on the Home Page or within the Saved Enquires at the top of the page.



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