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How To Use Dynamic Sub-Totalling

Desktop

A new feature that has been added to sales-i enquiries is ‘Dynamic Sub-totalling’. You can now gather totals of the data you choose.

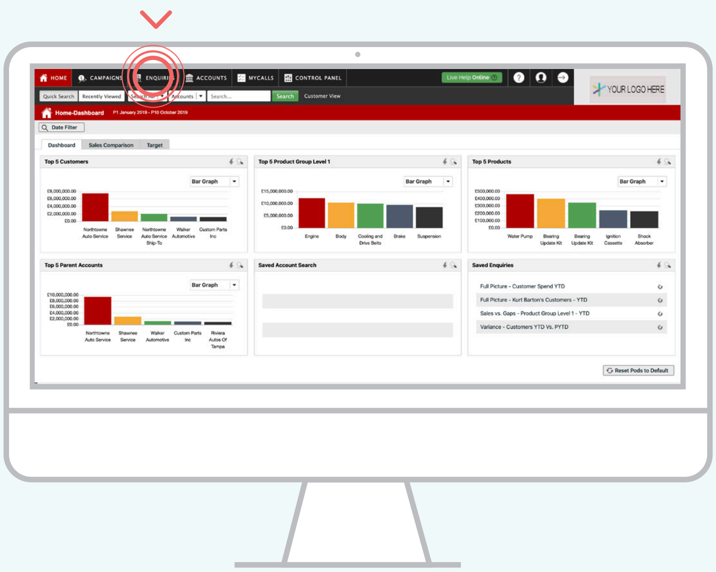
For example, we will show you to find the total for your top 5 biggest spending accounts and then the product group they purchase from.

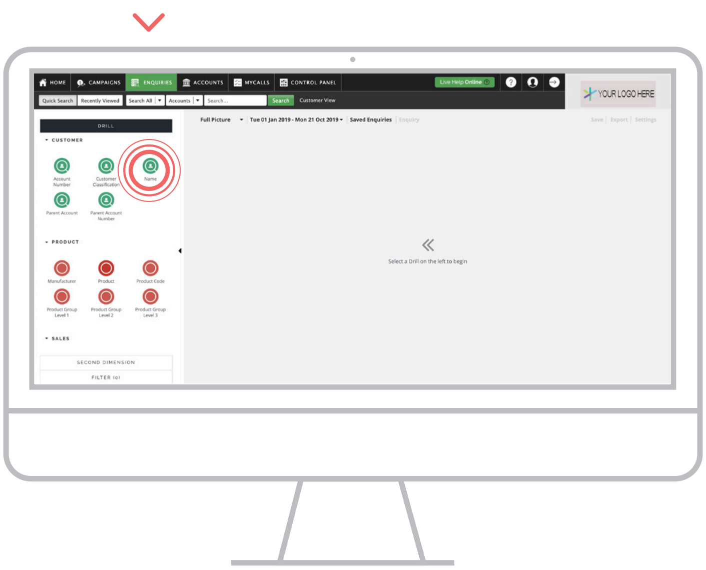
01 ENQUIRIES

From the top black navigation select the Enquiries tab

02 GATHER DATA

We are using the Full Picture Enquiry and selecting the Name bubble from the left-hand side using the YTD default date range for this example





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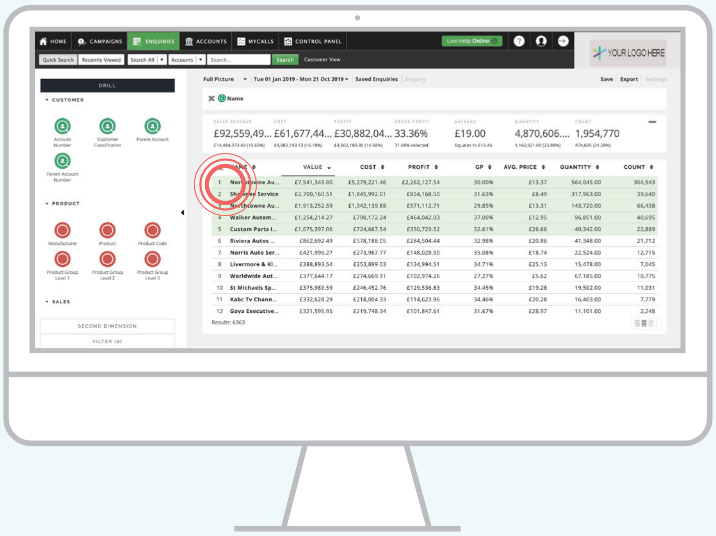
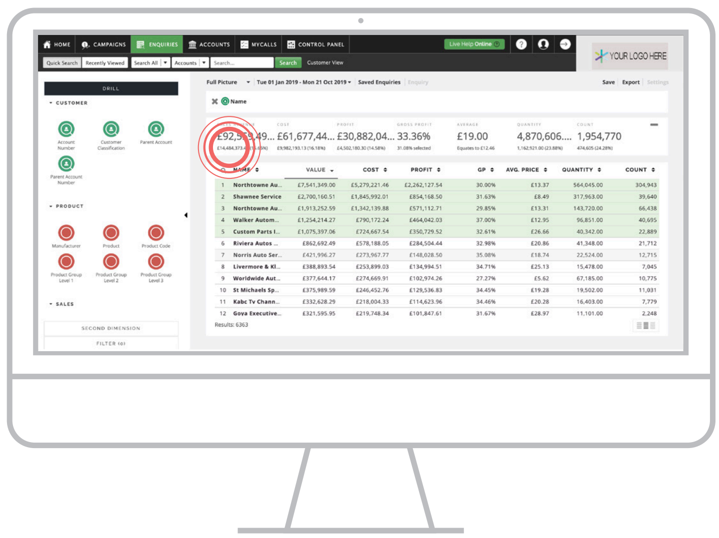
03 SELECT ROWS

Click on each of the top 5 customers in the list, alternatively select the top option and whilst hold shift on your keyboard, click the last account you wish to select. This works best for larger accounts



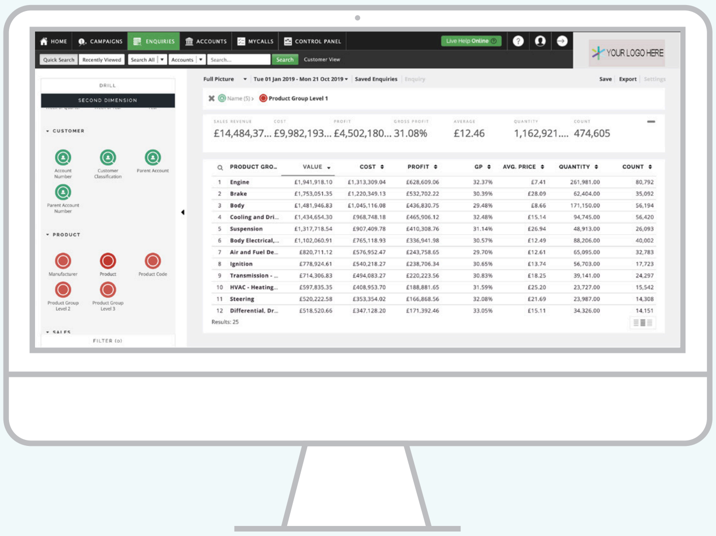
04 VIEW TOTALS

As you are select the rows of data you will see the Sub Total appear below the main Totals at the top of the page



05 DRILL FURTHER

Now you have the customers selected, choose the Product Group Level 1 bubble from the left hand side to drill into and see data against the customers selected.



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