sales-i SELL SMART

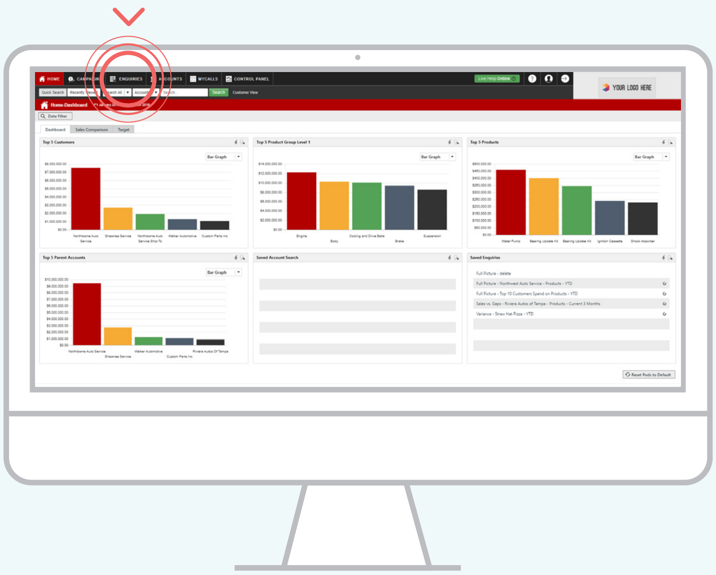
How To Find Your Top Spending Customers

Desktop

Using the Full Picture Enquiry, you can easily see your top spending customers, as well as those which are most profitable or buy the biggest quantity of items from you. Enquiries is the place to answer any questions you have about customer spend.

01 GO TO ENQUIRIES

From the black navigation bar at the top of the screen, click Enquiries.

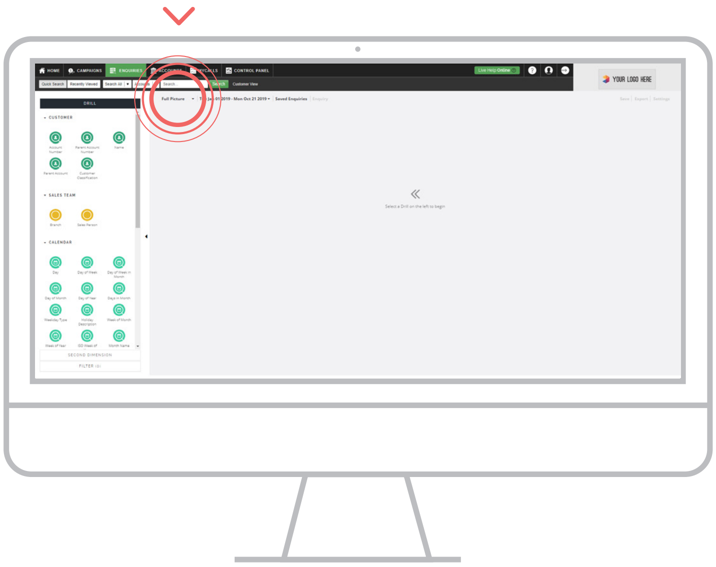


02 UNDERSTAND ENQUIRIES

The Full Picture enquiry is the default selection from the 4 enquiry types.

You can navigate to these different enquiries using the report type drop down.

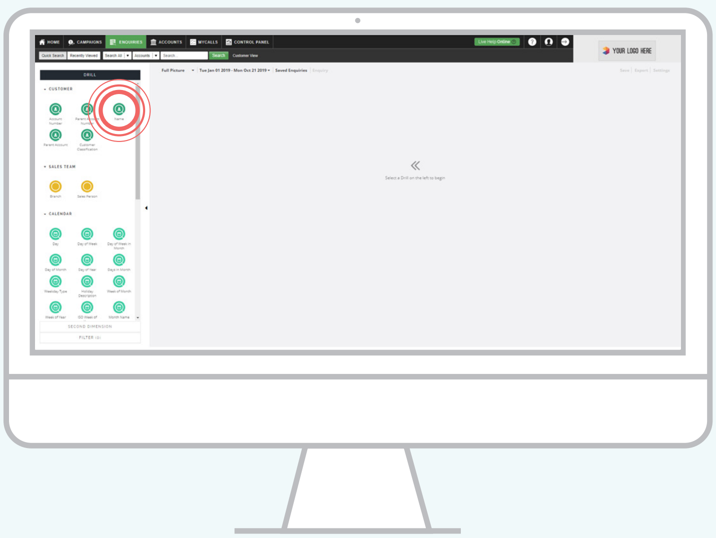
To find your biggest spending customers this YTD, we will be using the default enquiry type, Full Picture, and the default date range, YTD.



03 HOW TO VIEW CUSTOMERS

On the left side of your screen, within the Customer section, click on the Name bubble to view a list of your Customers.

Note: you can also use the Parent Account bubble to see overall spend for that customer, as opposed to spend for each delivery address separately.

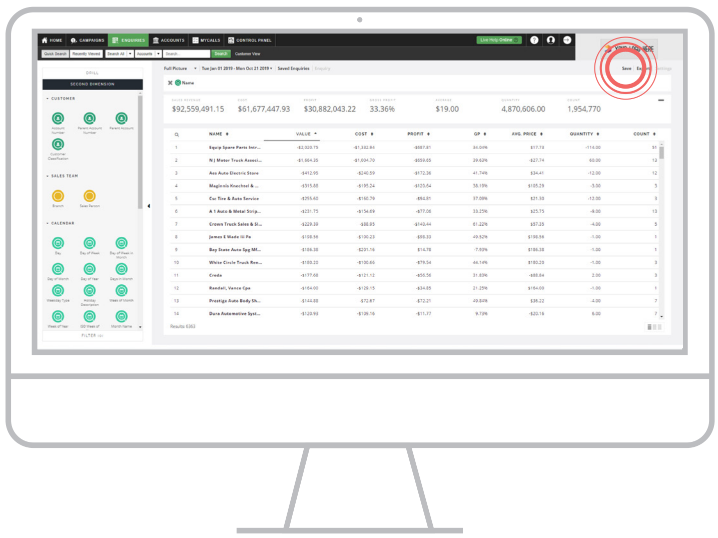


04 SORT RESULTS

Your biggest spending customers by sales Value are automatically sorted in descending order.

You will also see other measurement types, such as Cost, Profit, GP% and Quantity. You can click on any of these table headers to sort by this measurement type in descending or ascending order.

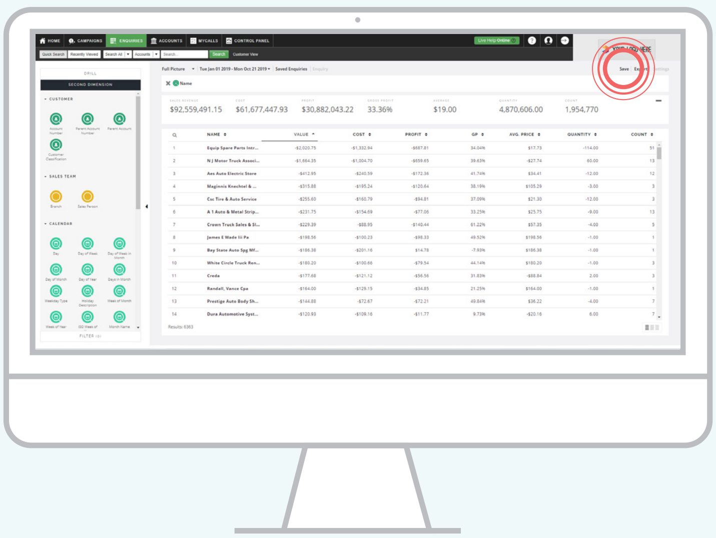
Save your Report (Optional)



05 SAVE ENQUIRY

You can also Save this enquiry for future reference.

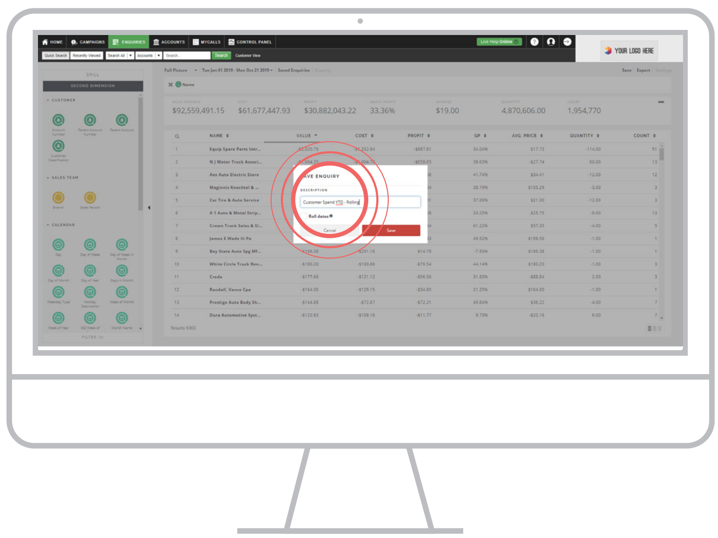
To do so, click Save in the top right corner



06 ADD A DESCRIPTION

Type in a name for this enquiry, e.g. 'Customer Spend YTD - Rolling' in the Description field.

Note: it is good to be as clear as possible when naming saved enquiries, to help you understand what the enquiry will show when you come back to it later.

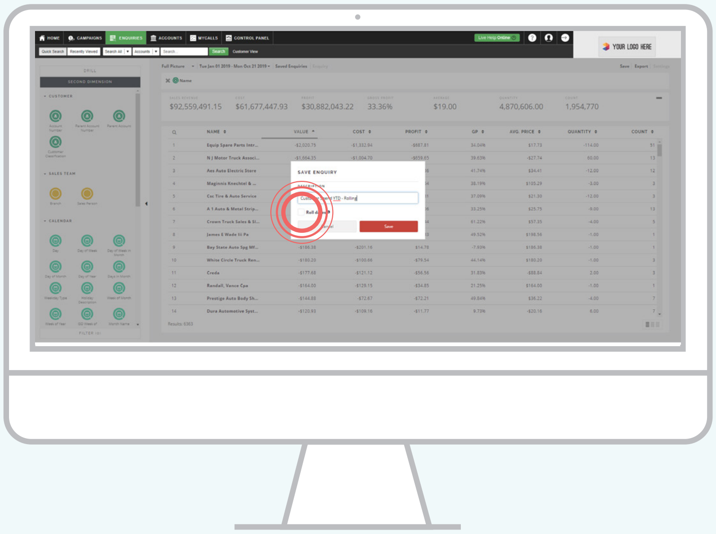


07 CHOOSE YOUR SETTINGS

To keep the numbers in the report relevant to the date you are viewing the report, check the Roll Dates checkbox.

Power Users, choose to save the report for all users to see, by checking the Save enquiry globally checkbox.

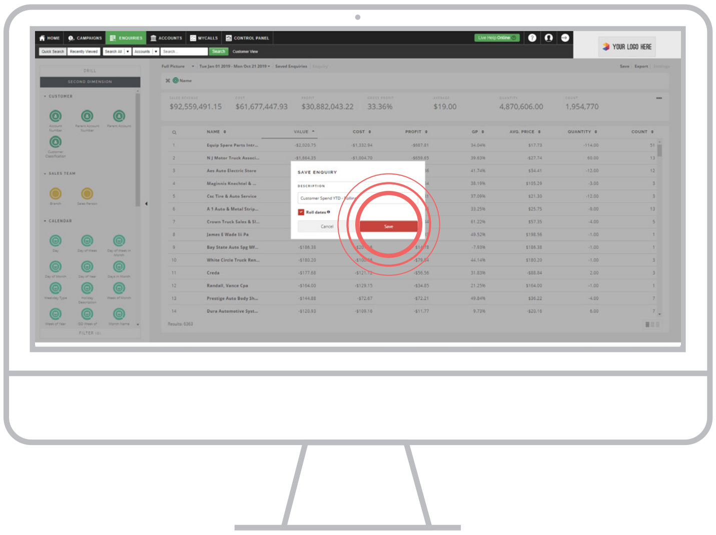
Note: If you do not choose to roll the dates for the report, you will always see the dates you saved when you reopen the report in the future. Your data will not change. YTD dates will roll as standard.



08 SAVE

Click the Save button.

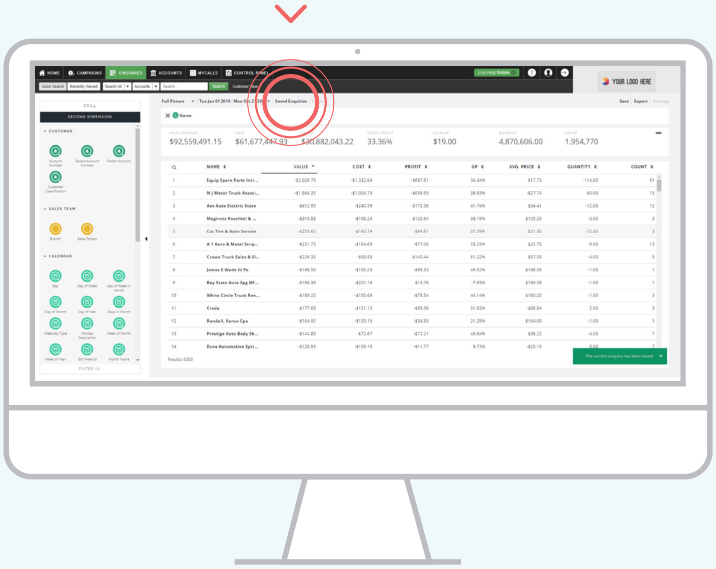
This saved enquiry will now appear on your Home Page and will automatically update with the latest sales data if you have chosen to roll your dates.



09 REVISIT SAVED ENQUIRY

As confirmation that your Enquiry has been successfully saved, a green text box will appear in the bottom right corner of the screen.

To access this, and all of your previously saved Enquiries, tap on Saved Enquiries.



10 SAVED ENQUIRIES

Your saved Enquiries will be listed in alphabetical order.

These will also be displayed on your sales-i homepage.