

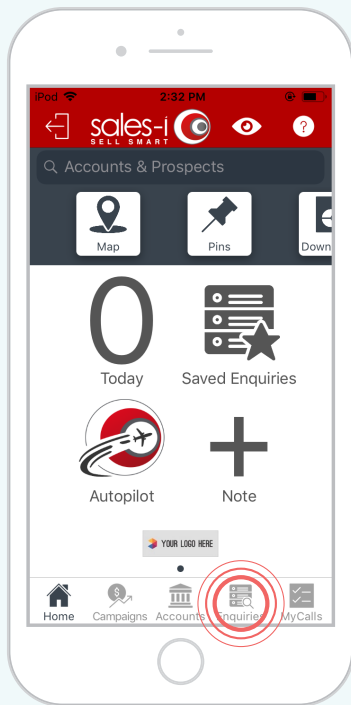
How To Find Your Top Spending Customers

Android

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 TAP ENQUIRIES

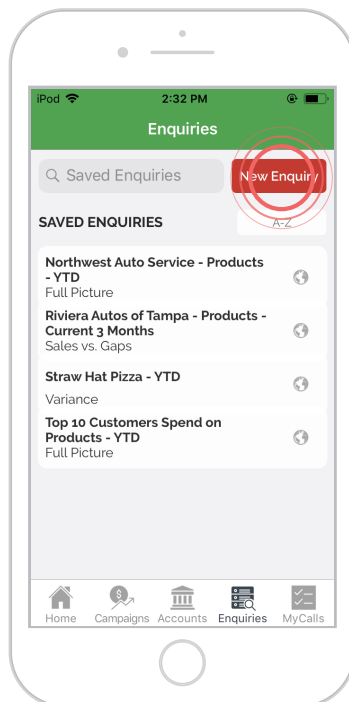
From the navigation bar at the bottom of the screen, tap Enquiries.



02 TAP THE NEW ENQUIRIES BUTTON

You will see your saved searches appear on the Enquiries home page.

To start a new report, tap the red New Enquiry button in the top, right corner.

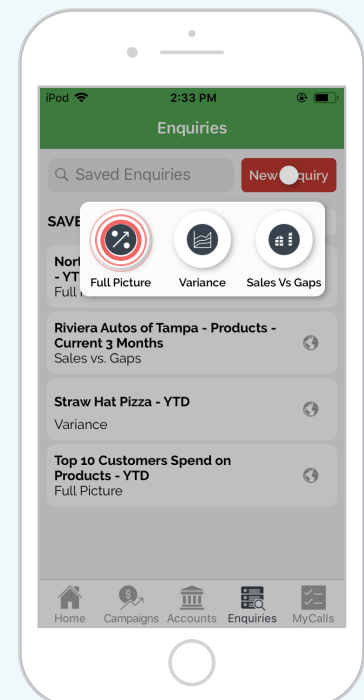


03 TAP FULL PICTURE

There are 3 enquiry types: Full Picture, Variance, and Sales vs Gaps

Each report formats the data in a unique way to help you extract the information you need.

To find your biggest spending customers this year-to-date, tap Full Picture, this will use the default date range, which is year-to-date.

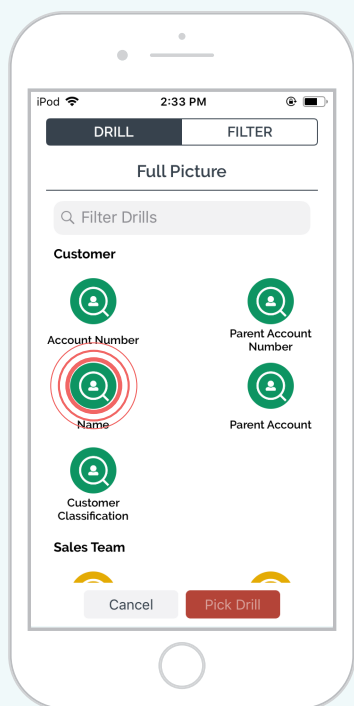


04 TAP THE NAME BUBBLE

You will then see the Bubble screen.

Here, you can pick from the five main categories of bubbles: Customer, Sales Team, Calendar, Sales, and Product (you may have further categories depending on your data). Each helps you drill into your data from a different viewpoint.

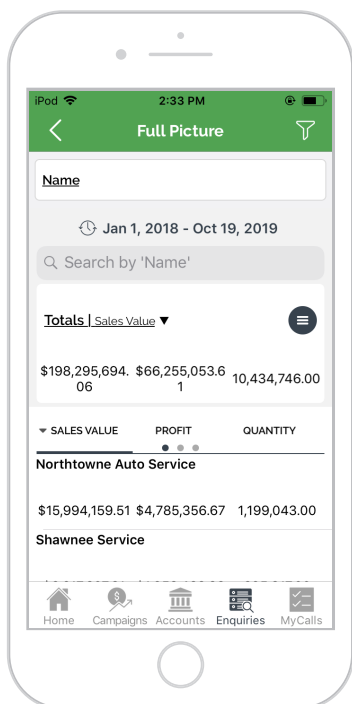
To see your biggest spending customer, tap the Name bubble under the Customer category.



05 RESULTS TABLE

Your biggest spending customers year-to-date are now displayed by sales value.

These customers are automatically sorted in descending order in a results table.

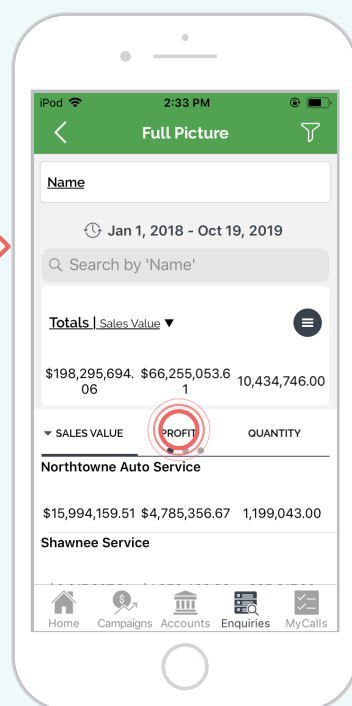


06 EXPLANATION

Also displayed are Profit, Quantity, Average Price, Sales Cost, GP, and Transaction Count.

These columns help you identify how much profit you are getting from your biggest customer, or what quantity of items they are buying from you.

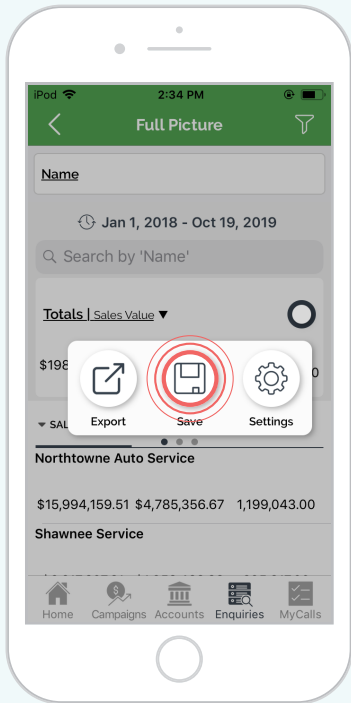
Tap on any other column header to sort by that measurement instead.



07 SAVE THE REPORT

You can also save this enquiry for future reference.

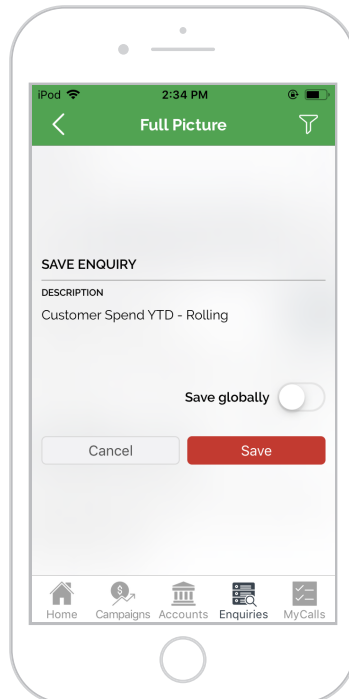
To do so, tap the menu icon in the top right corner of the totals bar, then tap Save.



08 NAME ENQUIRY

In the Description field, enter a name for this enquiry, such as "Customer Spend YTD (Rolling)".

It is helpful to be as clear as possible when naming saved enquiries to remind you what the enquiry will encompass when you open it later.



09 TAP SAVE

Tap Save.

This saved enquiry will now be accessible via the Saved Enquiries button on your Home Page and will automatically update with the latest sales data.

Note: When saving a report with a default date range, such as year-to-date, the report will automatically roll the dates forward to keep your data current.

