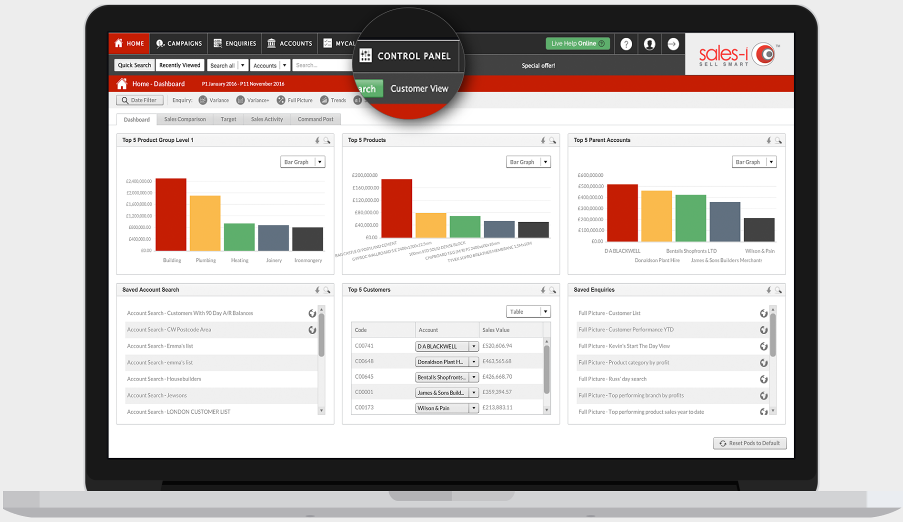
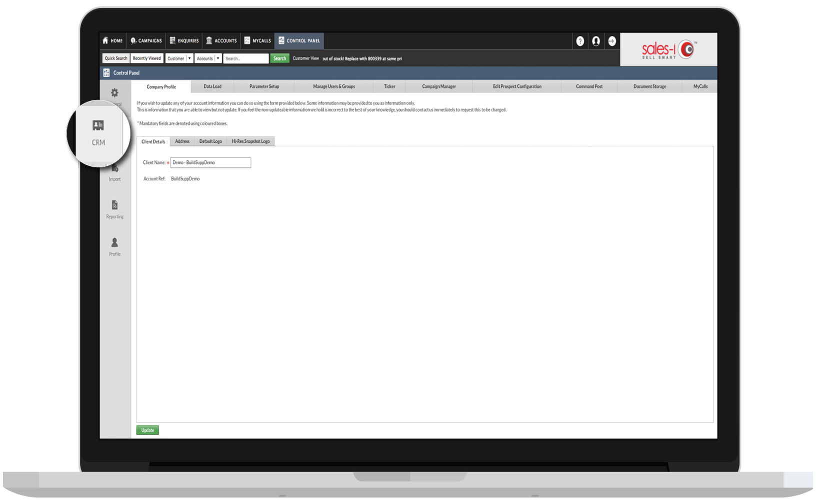
HOW TO...
EXPORT AN EXCEL SHEET OF YOUR COMPANY'S CUSTOMER BASE (POWER USER ONLY)

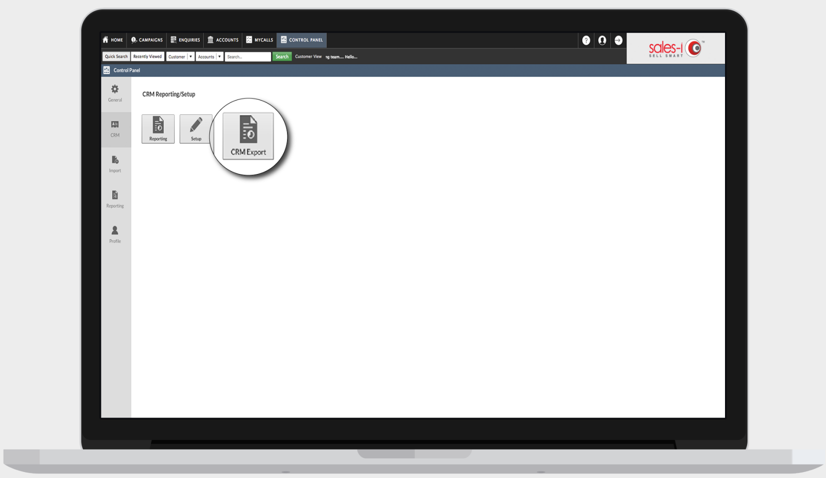
01 Enter the sales-i system and, from the navigation bar at the top, select **Control Panel**.



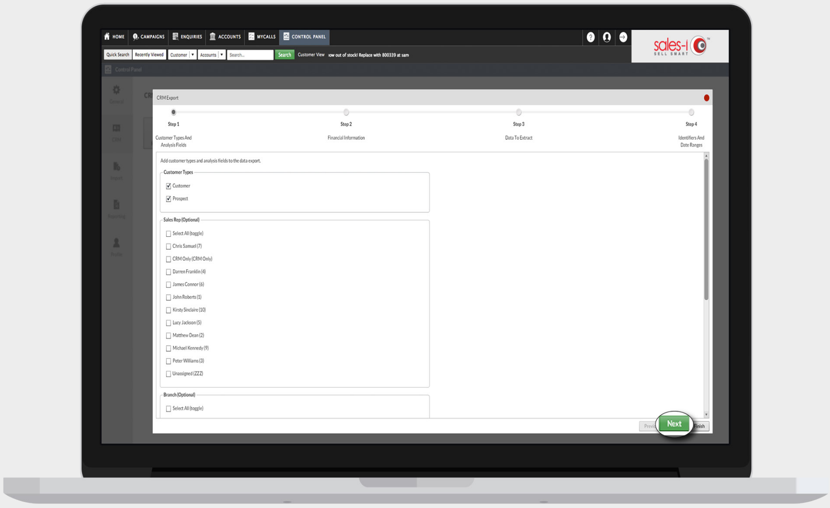


02 From the options on the left-hand side, click **CRM**.

03 Click **CRM Export.**

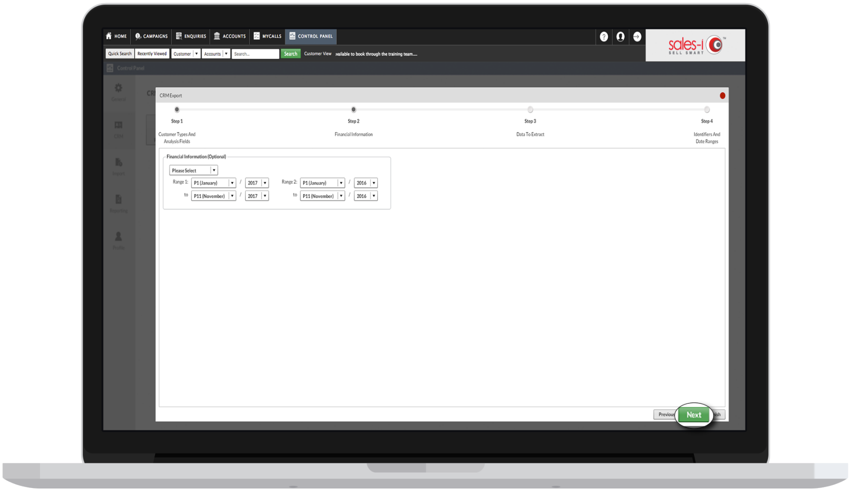


A new pop-up window should now appear with 4 steps:



4a Step 1 is the only compulsory step. Here, you'll need to decide which customer types and analysis fields you want to include in the export. When you're ready, click **Next** in the bottom right.

If you don't need to clarify any other details, click **Finish** and skip to **step 5**.



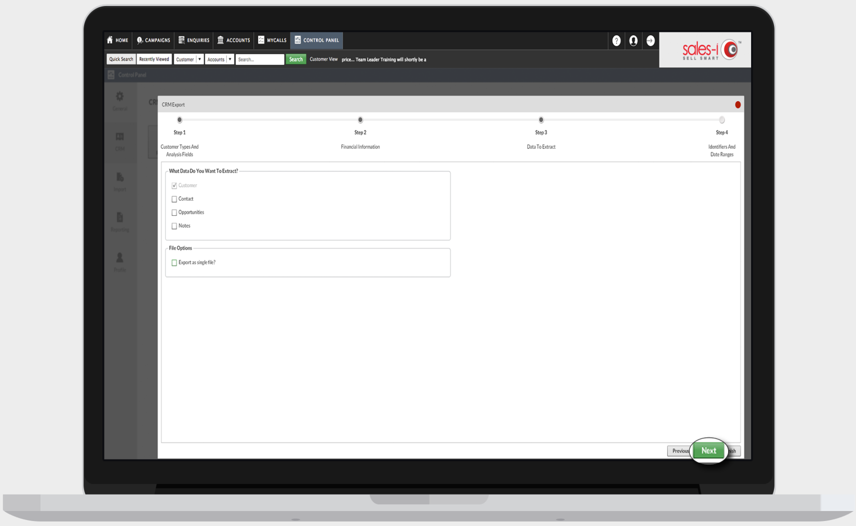
4b Step 2 allows you to select dates for financial information.

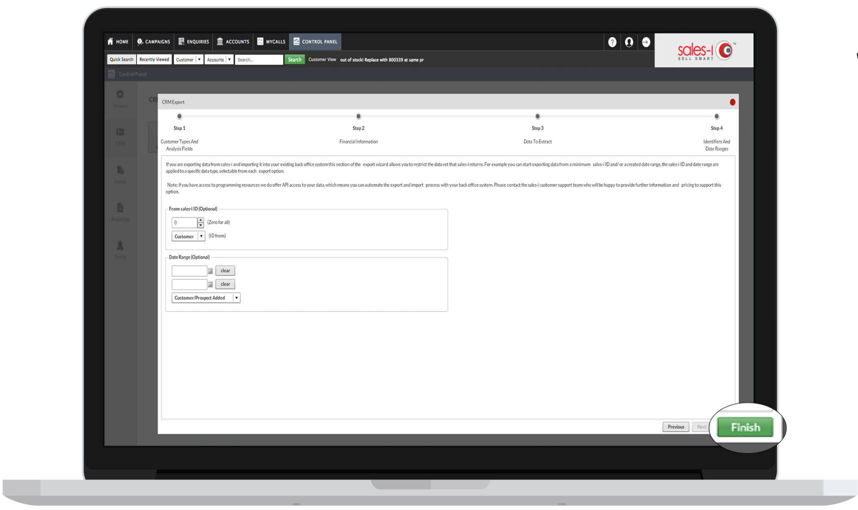
Once you have selected your dates, Click **Next** to to move to Step 3.

4c Step 3 allows you to determine which data will be extracted. Customer data is automatically selected.

You can select other fields, too, if needed. If you do, the export will be made as separate files for each field you select. If you'd prefer one file with everything in, tick **Export as single file?**

Click **Next** to move to Step 4.

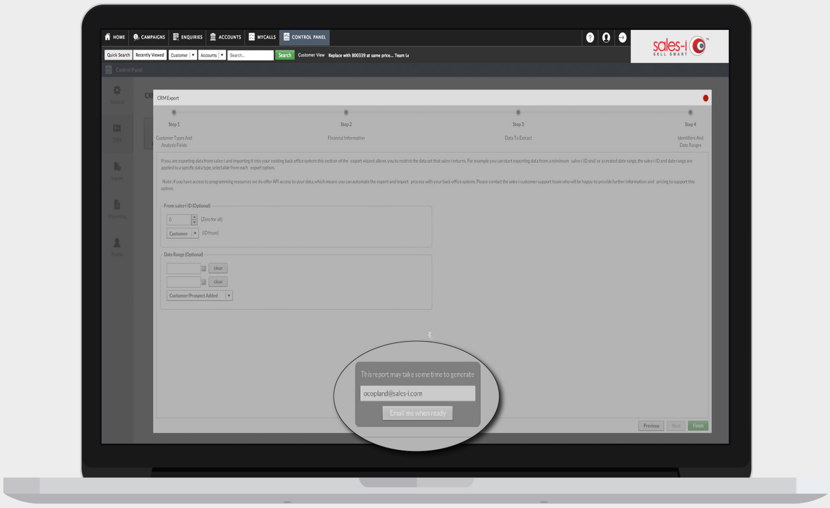


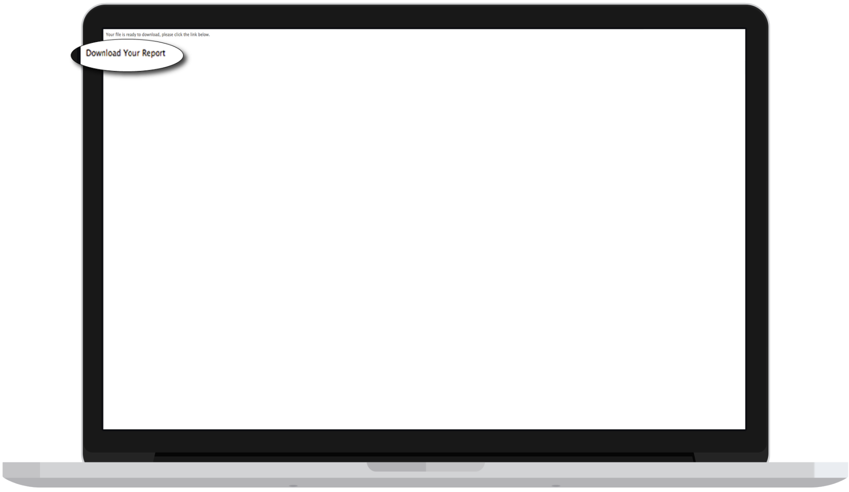


4d Step 4 allows you to determine whether or not you only want to export from certain sales-i ID numbers or from specific date ranges.

Once ready, click **Finish** and sales-i will generate the report.

05 You can wait a few moments for the report to appear as a pop-up download window or, if you want to have the report to hand for use later, you can click **Email me when ready** and the report will be sent to your inbox.



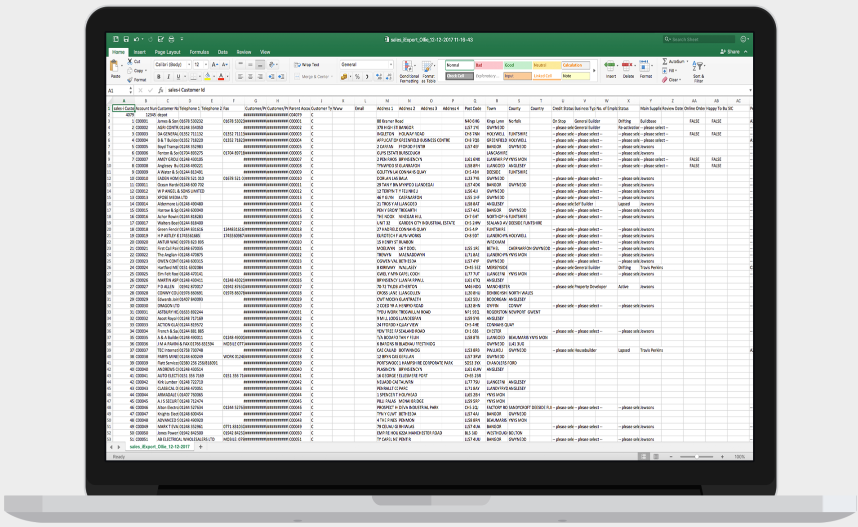


06 When it's completed, a pop-up window will appear*. Click **Download Your Report**.

*If this window doesn't appear, you'll need to adjust your pop-up security settings; contact your IT support team for help with this.

07 Your file will now download.

If it's in a zipped folder, you will need to extract it. You can contact your [support team] for help with this, if needed.



VISIT OUR SUPPORT SITE

Don't forget to visit our [support site] online to view sales-i how to's, tips, tricks and best practices.

https://my1.sales-i.com 0121 374 2004 support@sales-i.com https://support.sales-i.com