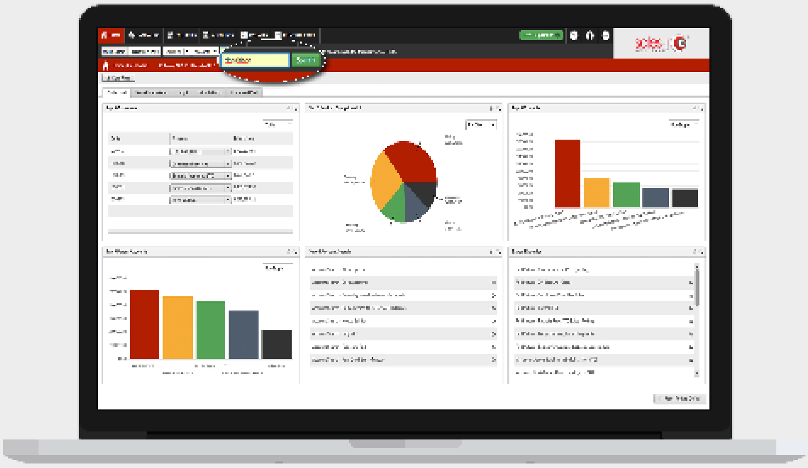
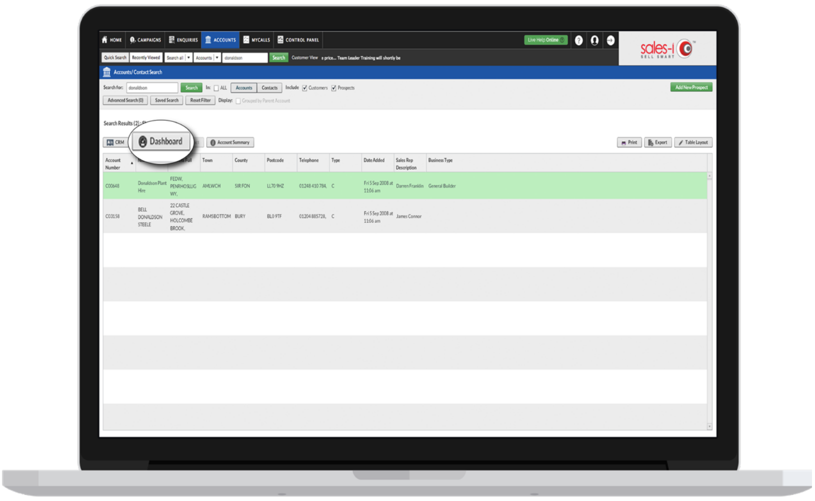
HOW TO CREATE A CUSTOMER REPORT

Generating customer-facing Snapshot Reports will give you the ability to discuss and present a customer's spend, opening up difficult conversations which can lead you to ask the right questions and identify any potential opportunities

This guide will show you exactly how to create a report on any customer account, which you can print off or save and take to your customer calls.

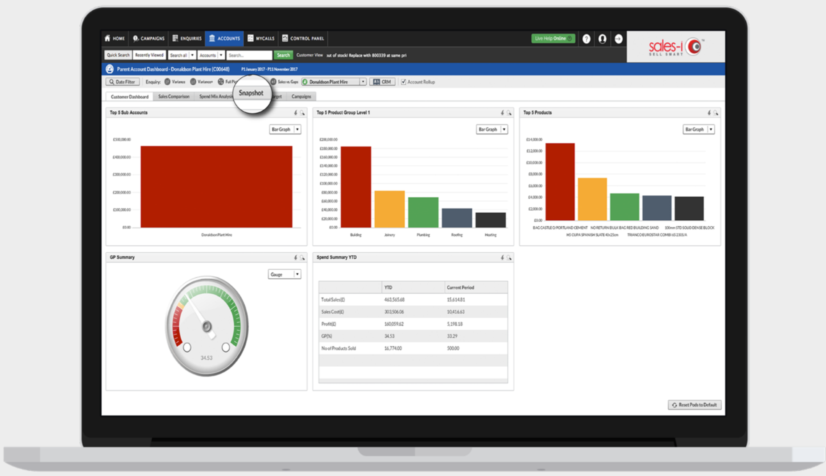
01 Use the **Quick Search** to find the account you wish to create a report for.





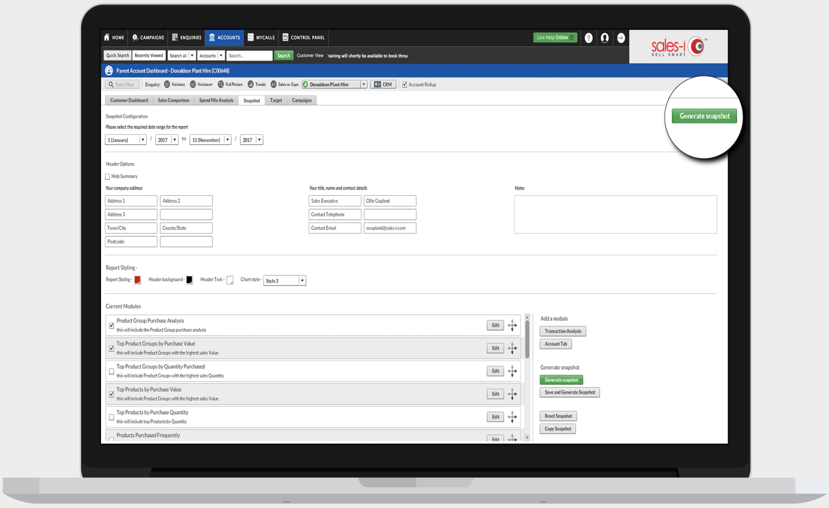
02 Select the correct result so that it is highlights green and then click **Dashboard.**

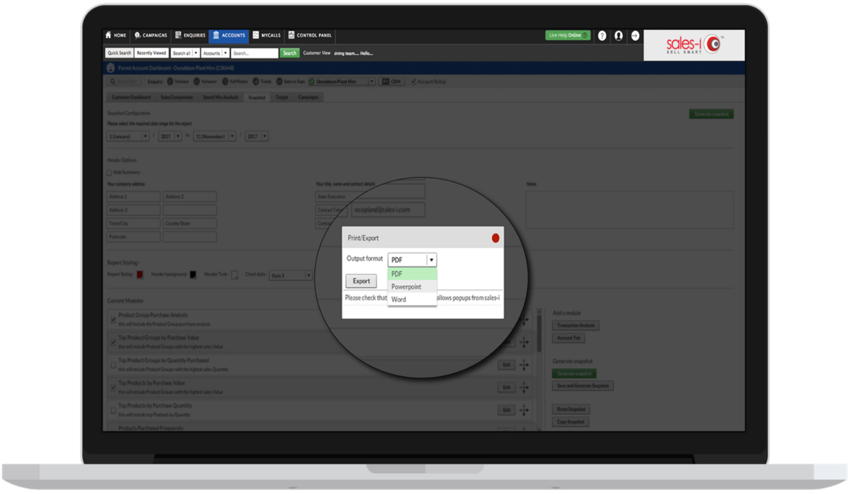
03 Select the **Snapshot** tab.



04 From the right-hand side, select **Generate Snapshot**.

Want to customize this report? Click here to see how.



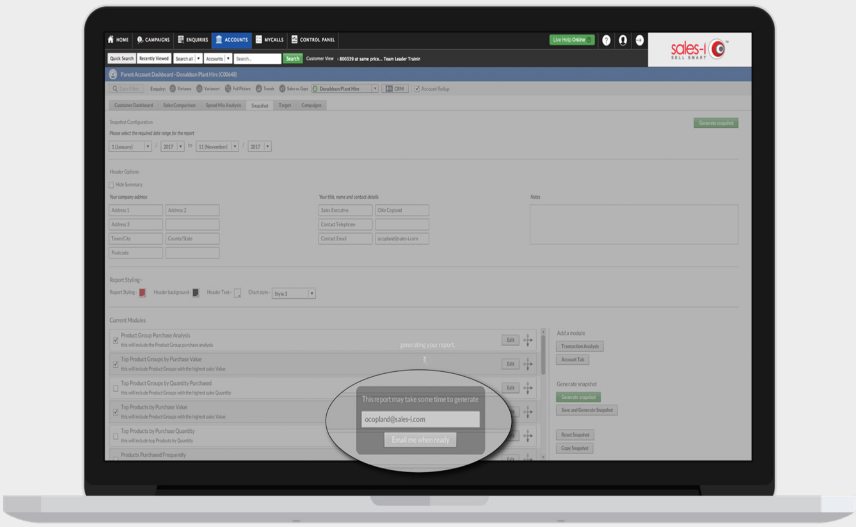


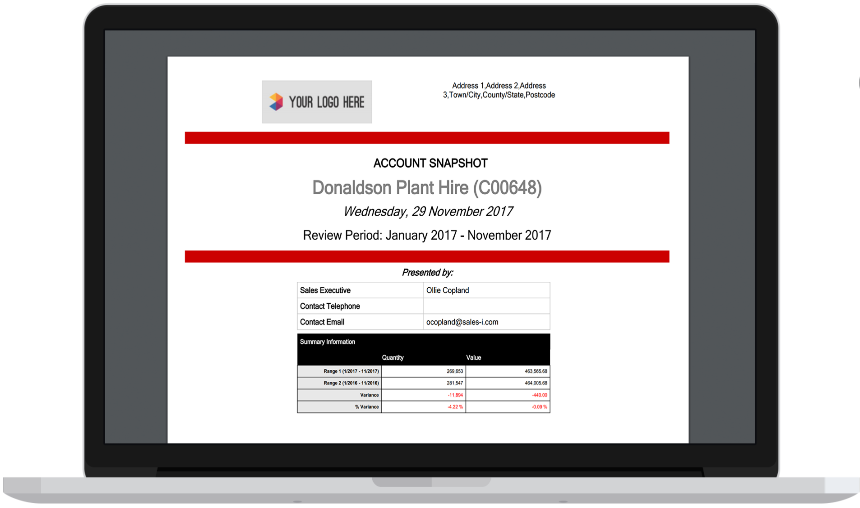
05 A pop up box will open, asking you what format you would like your customer report to be created in.

If you wish to share this report with a customer it's advisable to choose the un-editable format PDF, then click **Export.**

06 The Snapshot Report will now generate. You can wait a few moments for the report to appear as a pop-up download window. Ensure that pop-ups are not blocked from sales-i by your browser.

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.





07 That's it, your Snapshot report is now ready to use.

No internet where you're going? Use the Autopilot feature on the sales-i app to generate this report even when offline.

Click here to see how to use Autopilot on your Apple iOS device.

Click here to see how to use Autopilot on your Android device.

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