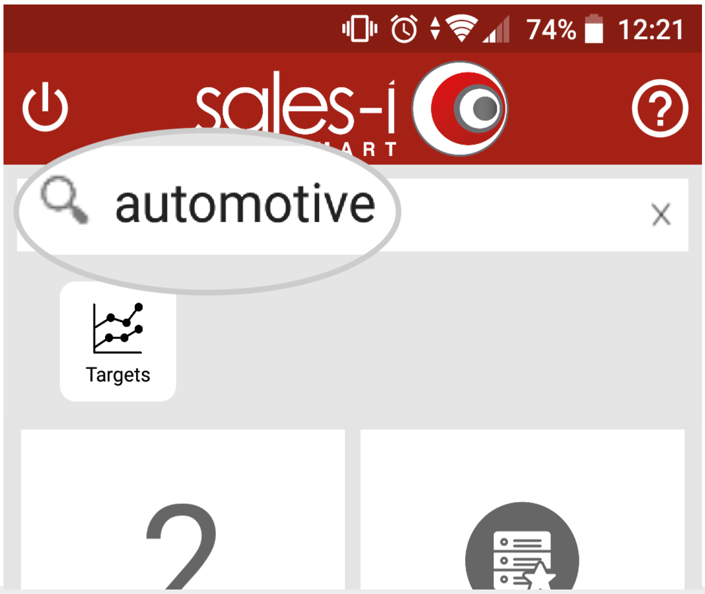
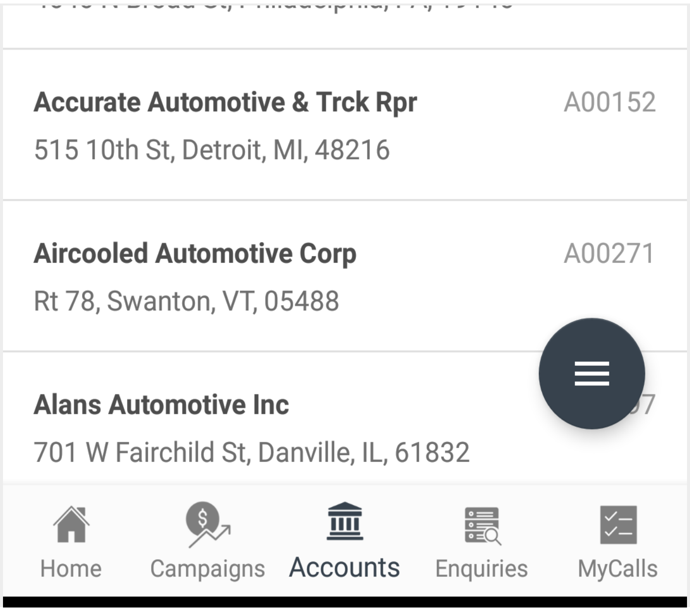
HOW TO CREATE A CUSTOMER SNAPSHOT REPORT ON YOUR ANDROID DEVICE

Generating Snapshot Reports will give you an account review document which can lead you to ask the right questions and identify sales opportunities with your customers. This guide will show you how to create a customer facing report for any of your accounts.

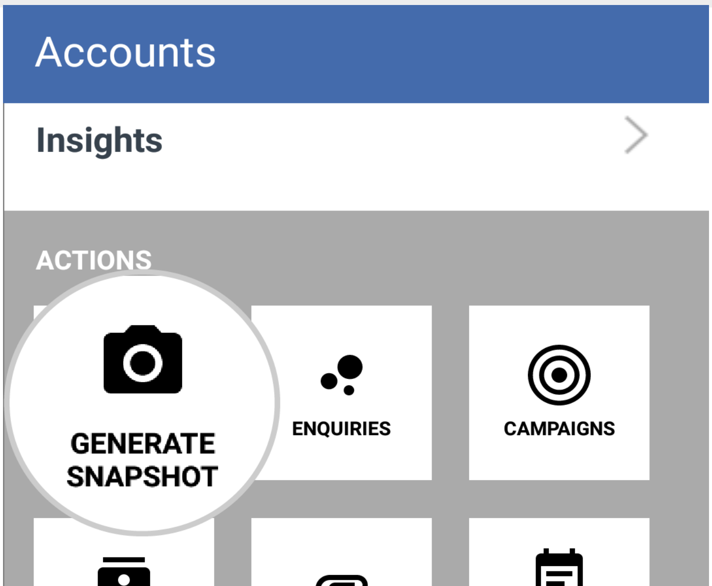
01 From the home page, use the **Quick Search** to find the account you wish to create a report for by searching for the (full or partial) account number or name.

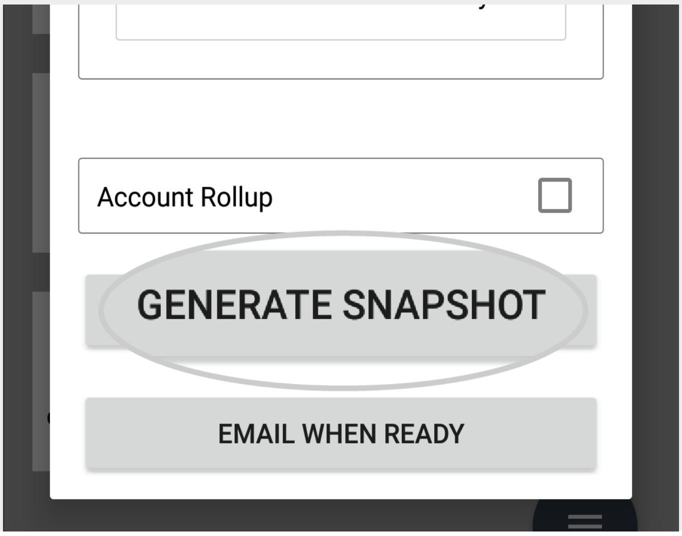




02 Select the correct account from the result list to view their Account Card.

03 From the **ACTIONS** section, tap the **GENERATE SNAPSHOT icon**.



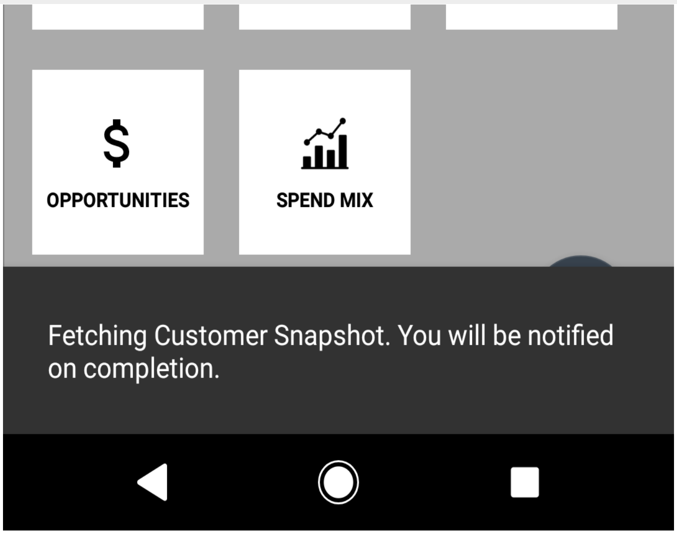


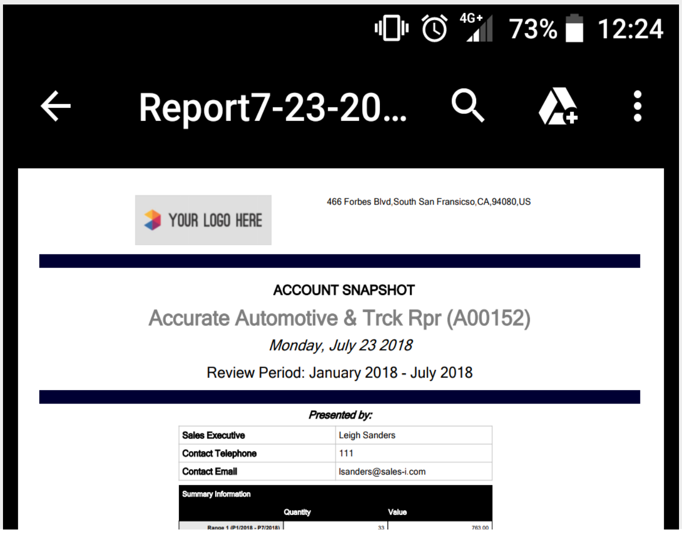
04 Select your start and end date for the report and tap **GENERATE SNAPSHOT**.

If you want to use the report later, you can tap **EMAIL WHEN READY** and the report will be sent to your inbox.

Want to customize this report? Visit **https://support.sales-i.com/dashboard/how-to-guides/how-to-customize-snapshot-reports** to see how (desktop only).

05 The Snapshot Report will now generate. When it has been downloaded, you will receive a notification.





06 Tap **View** and choose your PDF viewer to view the report on your device.

*Please note: you may need to download a PDF viewer from the Google Play store, if you don't already have one.

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 when offline.

Visit **https://support.sales-i.com/autopilot/how-to-guides/getting-started-with-autopilot** to see how to use Autopilot on your Android device.