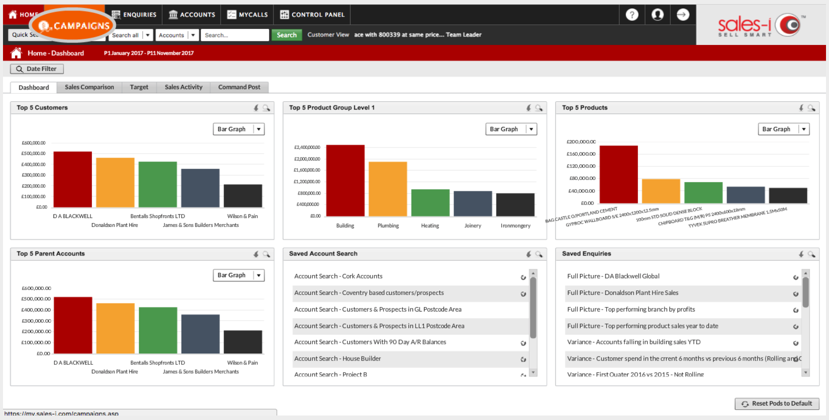
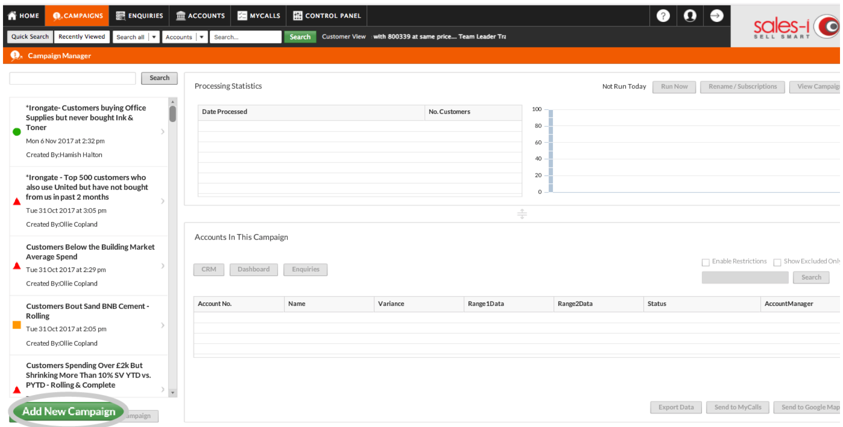
HOW TO FIND YOUR TOP 50 CUSTOMERS - POWER USERS ONLY

All users can use sales-i to access a list of your top spending accounts via the Enquiries tab.
(Visit https://support.sales-i.com/enquiries/how-to-guides/how-to-find-your-top-spending-customers to see how.)
Power Users also have the ability to narrow this down to the top 50 (or custom number) accounts companywide via Campaigns.

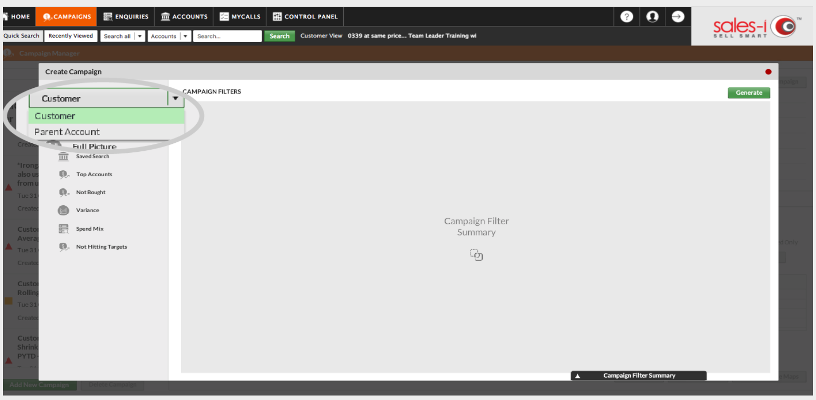
01 Click **Campaigns** from the menu at the top of the screen.

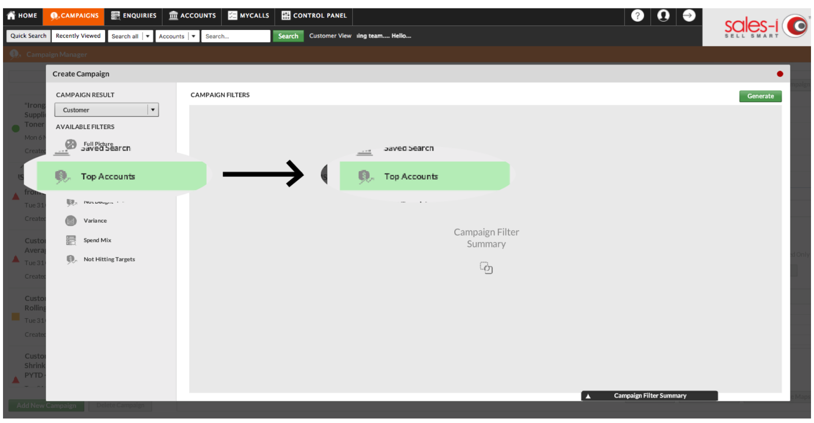




02 Click **Add New Campaign** in the bottom left of the screen.

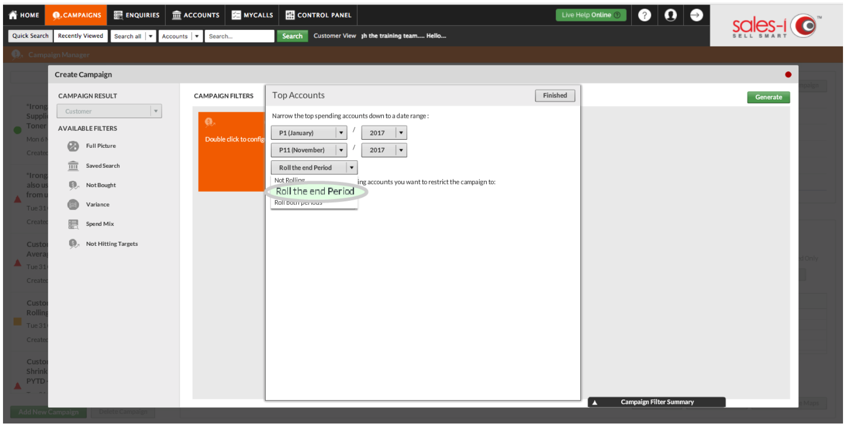
03 Firstly, you will need to decide if you want to filter the results to show either **Parent Accounts** (head office locations) or **Customers** (delivery addresses/sub accounts).
For this example, we will choose Customers.

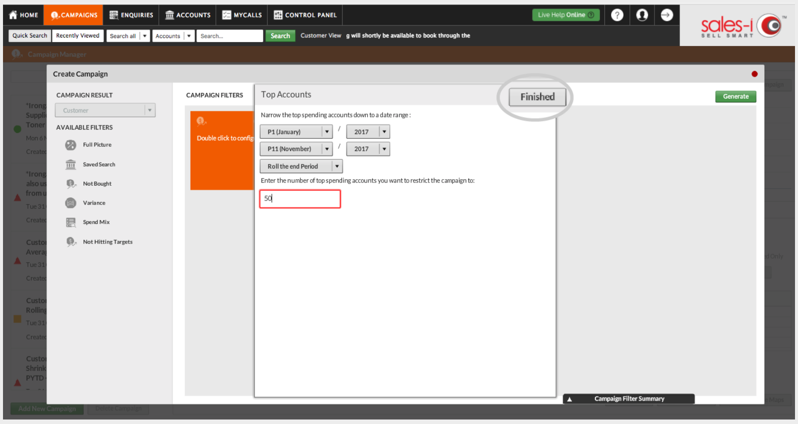




04 Drag and drop the **Top Accounts** campaign filter from left to right

05 Select the date range you want to search within – this could be as broad as 'all time' or as narrow as 'the current 2 months'. A commonly used date range is YTD – to do this, ensure the month and year fields are correct, and select '**Roll the End Period**' from the drop down.

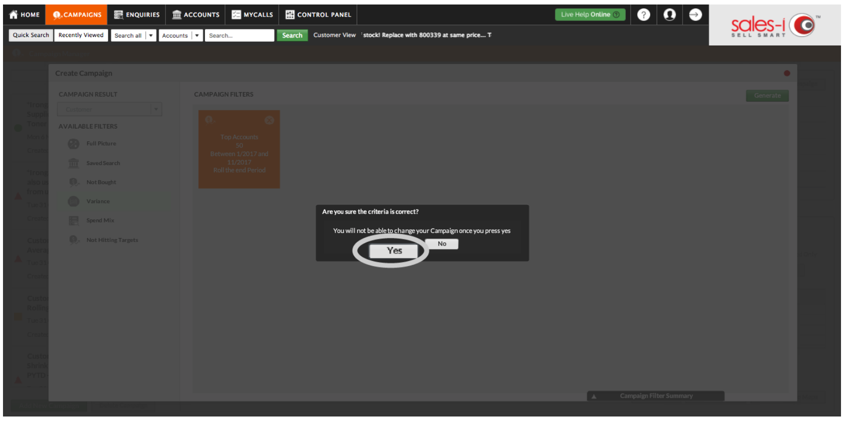


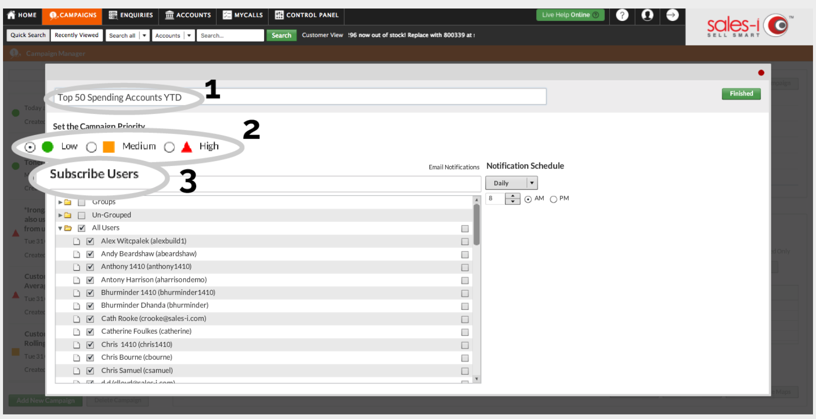


06 Next, type in the number of top accounts you want to restrict to – in this case 50 – and click **Finished**.

07 To generate the campaign, click the green **Generate** button in the top right hand corner of the pop up window.

Please Note: A pop-up window will appear asking 'Are you sure the criteria is correct?' - click **Yes**

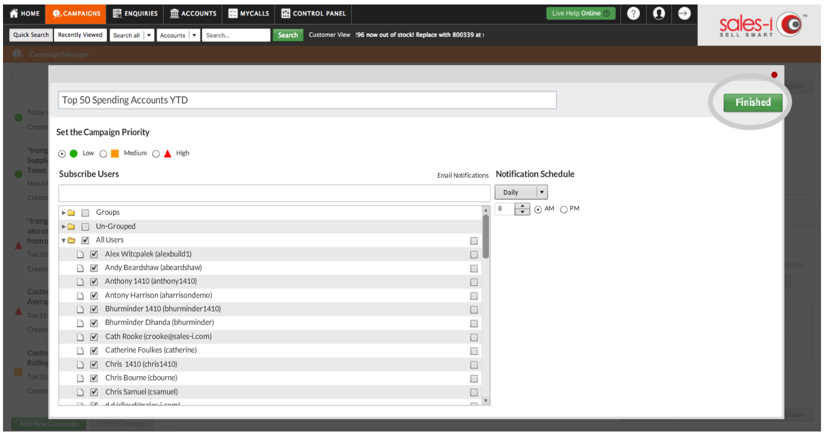


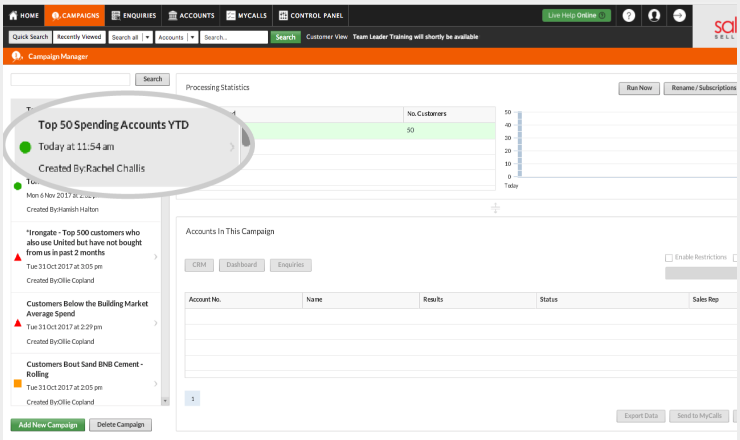


08 On this screen you can:

- Give the Campaign a name: i.e. 'Top 50 Spending Accounts YTD'
- Set the **Campaign Priority** by selecting from the traffic-light system, and
- **Subscribe** any/all users to the campaign

09 Click the green **Finished** button in the top right hand corner to view your Campaign results.





10 Click on the Campaign name from the list on the left-hand-side to view the results.

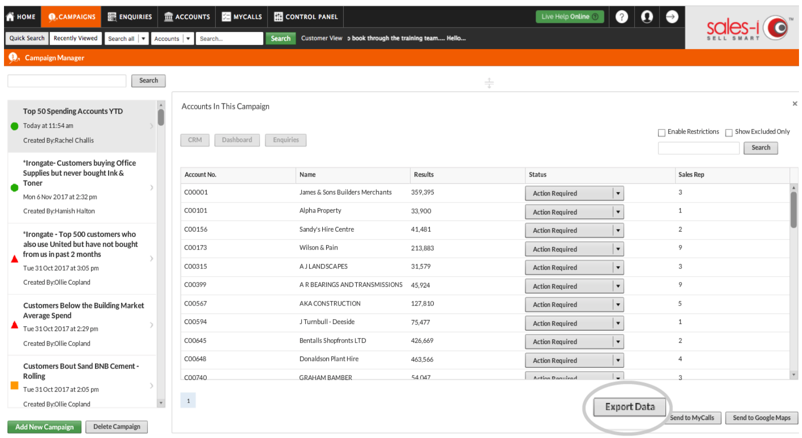
A Power User will have the option to view the most recently run version of the campaign by selecting from the list under **Processing Statistics** in the top centre of the screen.

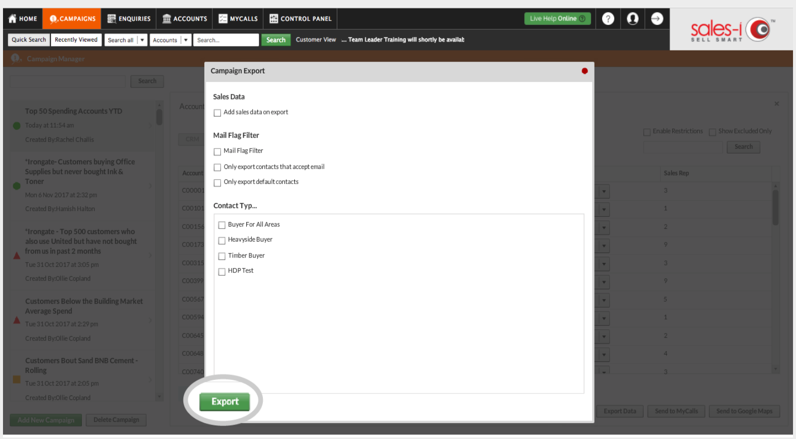
Please Note: Campaigns can only be generated by a Power User, however the results can be accessed, run, and actioned by all users. The result may differ depending on user restrictions (e.g. if a user is restricted to only see their customers, they will see the number of their customers that fall into the top 50 companywide

OPTIONAL

11 If needed, there is also an option to export this data to a CSV file. For example, to send to your marketing team for reference.

To export this list click **Export Data** in the bottom right of the screen





12 Now, you can select any additional criteria that you want to include on the export or alternatively, just click **Export.**