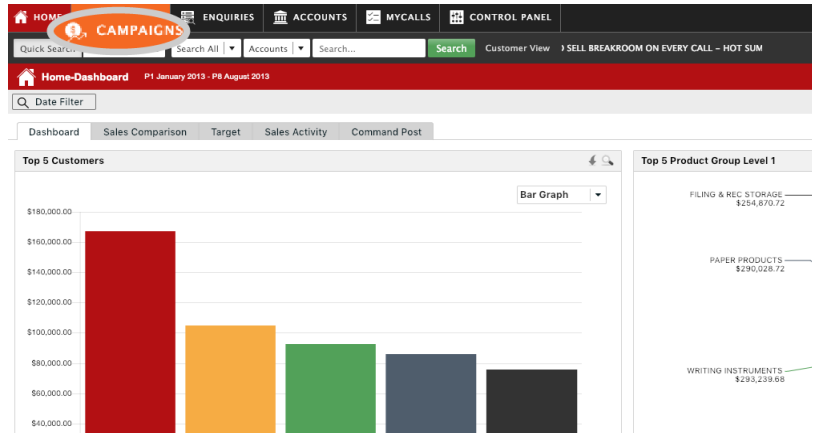# HOW TO FIND WHICH OF YOUR TOP 300 CUSTOMERS HAVE NOT BOUGHT ANYTHING SO FAR THIS MONTH

Campaigns can be used to identify your high spending customers who have not spent anything so far this month. Creating campaigns can only be done by Power Users, but they can be set up to be viewable by other users as well.
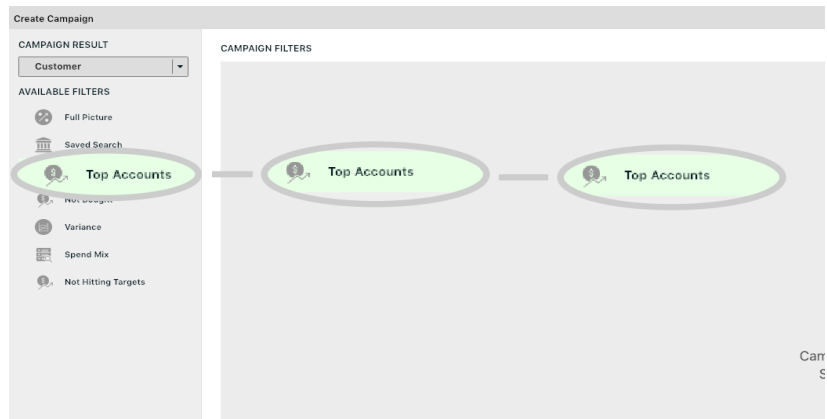
**01** Click **Campaigns** from the menu at the top of the screen.

02 Click the green **Add New Campaign button** in the bottom left of the screen.
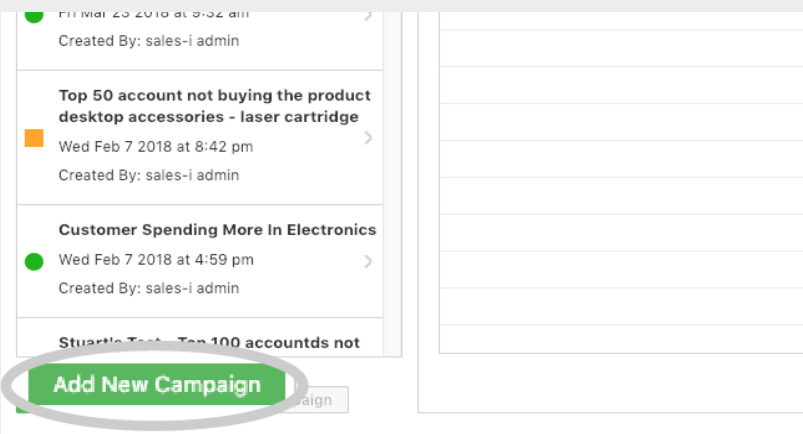
03 Click on **Top Accounts** (on the left side of the screen) and drag it over into the **Campaign Filters** area.

04 To find your top 300 accounts it is best to set the date range to a larger period of time and exclude the current month as we are looking for the customers who spent the most in the past and nothing yet this month.
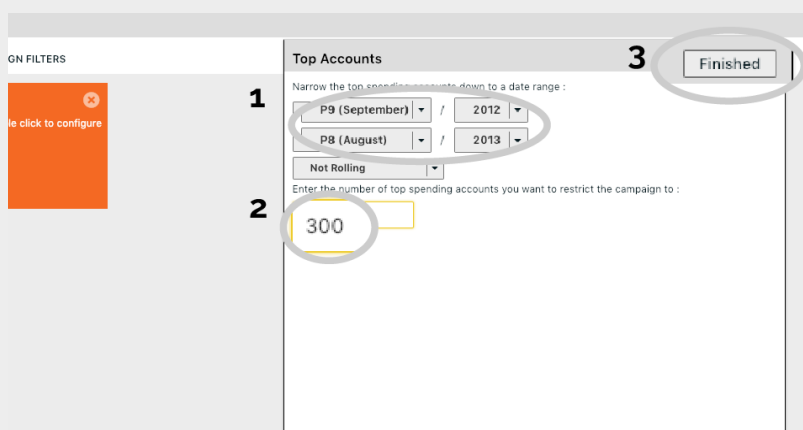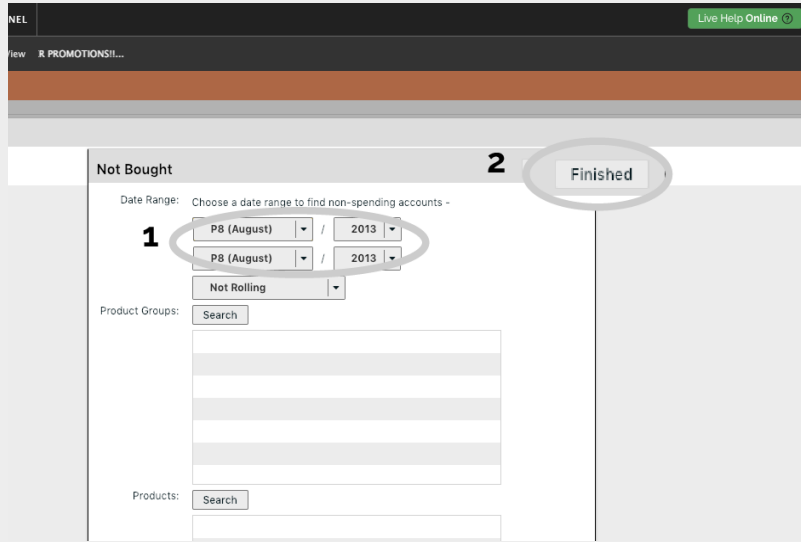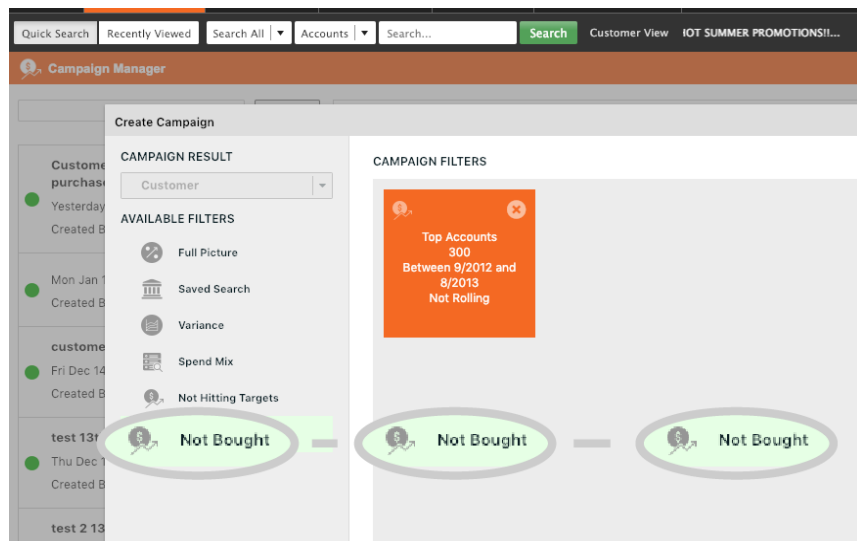
For this example we will set the **Date Range** for previous 12 months and set the number of accounts to **300**.

Finally, click **Finished**.

05 Now we must select the Not Bought filter.

Click on **Not Bought** on the left side of the screen and drag it over into the **Campaign Filters** area.


06 Now we need to select the months we want to check when our top 300 customers have not bought in. So, set the date range to the current month.

We recommend changing Not rolling to **Roll Both Periods** too. This will keep the Campaign up to date so that it always runs for the current month, whenever you relook at it.

We will leave the Product Groups and Products sections empty. (As we wish to check which of our customers have bought nothing at all).

Finally, click **Finished** in the top left of the window.

07 Next, click on the green **Generate** button in the upper right corner of the window.
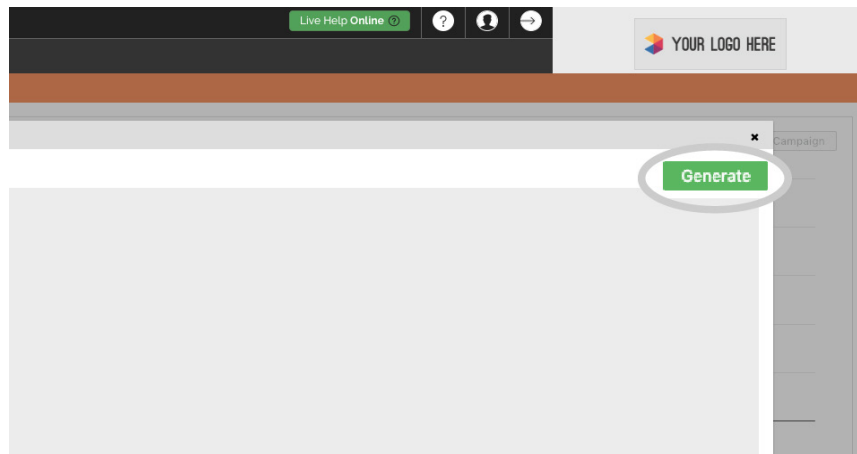
08 sales-i will ask you if you are sure the criteria is correct. You will not be able to change your campaign once you press yes.

If you are ready to proceed, click **Yes**. Your campaign will now be created.

09

You now need to enter a name for this enquiry. For example: 'Top 300 customers who have not bought so far this month.'

You can also set the priority of the campaign, how frequently you would like it to run, and assign users to see the results if you so desire.
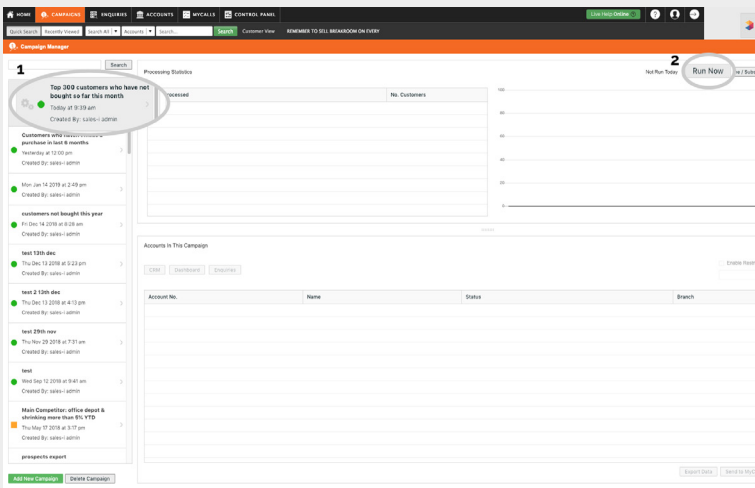
We recommend checking the results of the campaign first to make sure it's correct and properly shows the information you are looking for, before assigning users, at a later stage.

Click the green **Finished** button (top right).
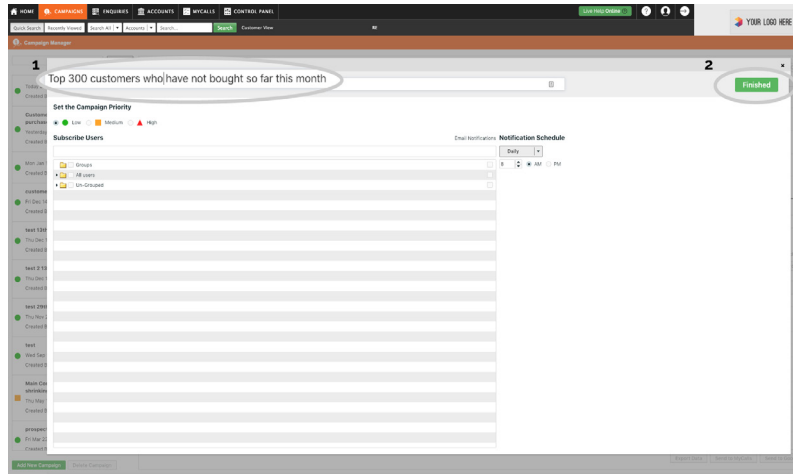
10

To view the results of this campaign, click on its **title** in the menu on the left.

Then, click **Run Now** in the upper right corner.

11

A spinning gear icon will appear to the left of the campaign's name while it is running. Campaigns can take a few minutes to run.

Once the icon has stopped spinning, click on the latest process in the **Processing Statistics** section, this will populate all the **Accounts In This Campaign** field.
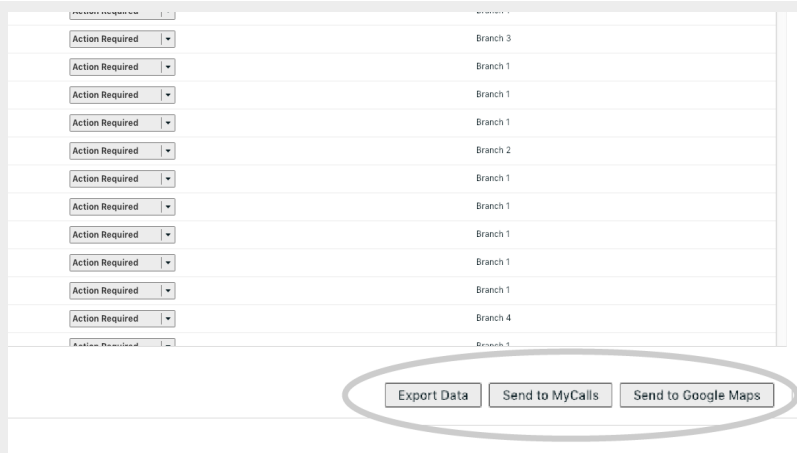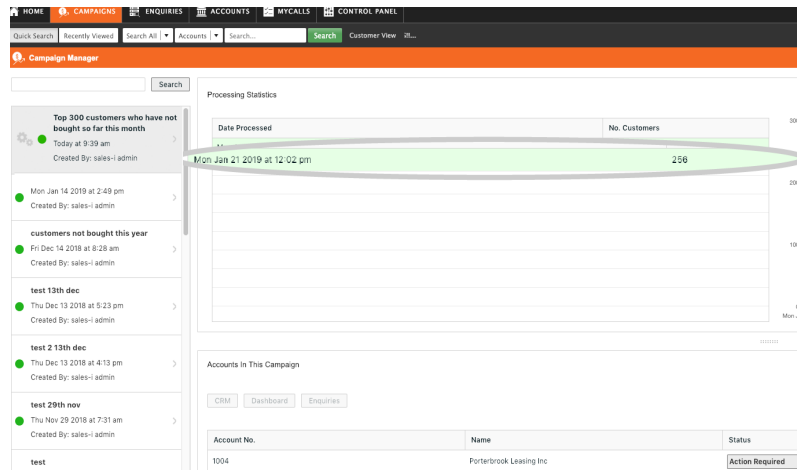
12

You can use the options at the bottom right of the screen to either:
Export Data: Export this list to Excel.
Send to MyCalls: Send it to your diary, so you can call them at specified times.
or
Send to Google Maps: To see the accounts plotted on a map so you can plan visits, to start the sales rolling in.