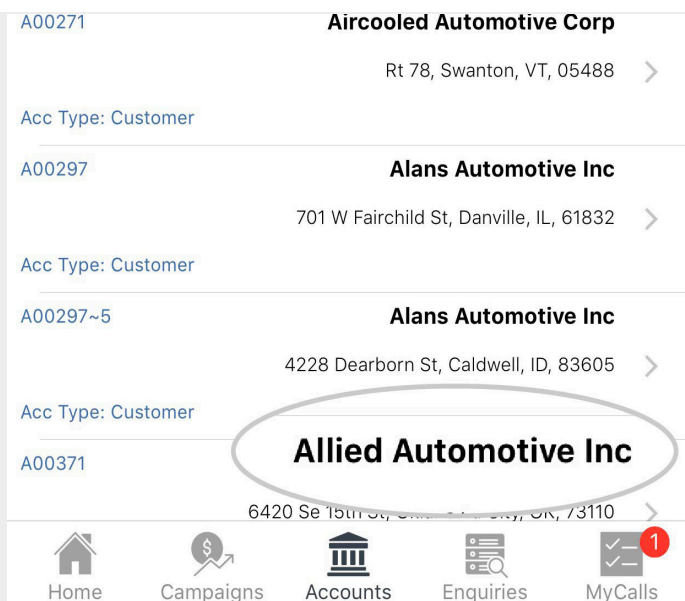


# HOW TO CREATE A CUSTOMER SNAPSHOT REPORT ON YOUR APPLE DEVICE

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.



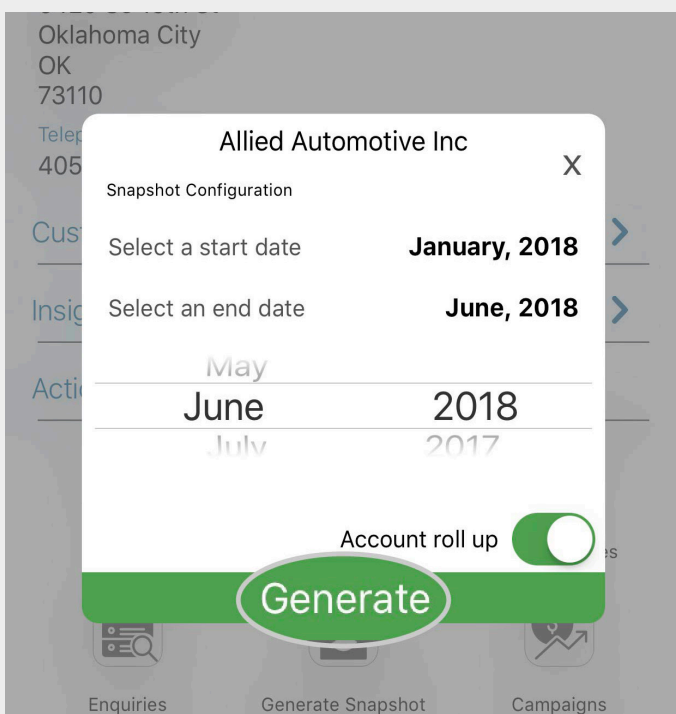
**02** Select the correct account from the result list to view their Account Card.

**03** From the **Actions** section, tap the **Generate Snapshot** icon.



## 04 Select your start and end date for the report and tap **Generate**.

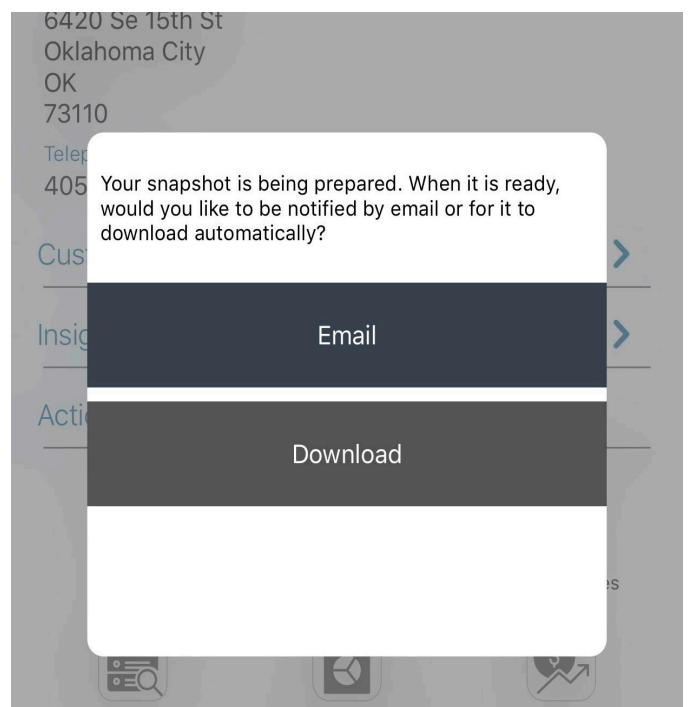
Want to customize this report? Visit <https://support.sales-i.com/dashboard/how-to-guides/how-to-customize-snapshot-reports> to see how (desktop only).



## 05 You now have two options:

If you want to have the report to hand for use later, you can tap **Email** and the report will be sent to your inbox.

Alternatively, tap **Download** to view the report instantly (the report will appear when downloaded).



## 06 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 Apple device.

