

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.



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.





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**





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





OClick on the Campaign name from the list on the lefthand-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

👫 HOME 🧕 CAMPAIGNS 📰 ENQUIRIE	s 💼 A	CCOUNTS 🖾 NYCALLS 🔛	CONTROL PANEL		Live Help Online () ?	
Quick Search Recently Viewed Search all	Accounts	s 🛛 🔹 Search Sear	ch Customer View a book through the tr	aining team Hello		
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Top 50 Spending Accounts YTD Today at 11:54 an Created By:Rachel Challis	> Î	Accounts In This Campaign	uiries			× Dable Restrictions Show Excluded Only Search
*Irongate- Customers buying Office Supplies but never bought Ink & Toner Mon 6 Nov 2017 at 2:32 pm Created ByHanish Halton		Account No.	Name	Results	Status	Sales Rep
		C00001	James & Sons Builders Merchants	359,395	Action Required	3
		C00101	Alpha Property	33,900	Action Required	1
*Irongate - Top 500 customers who also use United but have not bought from us in past 2 months Tue 310ct 2017 at 355 pm Created By:Ollie Capland		C00156	Sandy's Hire Centre	41,481	Action Required	2
		C00173	Wilson & Pain	213,883	Action Required	9
		C00315	AJ LANDSCAPES	31,579	Action Required	3
		C00399	A R BEARINGS AND TRANSMISSIONS	45,924	Action Required	9
Customers Below the Building Market Average Spend Tue 31 Oct 2017 at 2:29 pm Created By:Offie Copland		C00567	AKA CONSTRUCTION	127,810	Action Required	5
		C00594	J Turnbull - Deeside	75,477	Action Required	1
		C00645	Bentalls Shopfronts LTD	426,669	Action Required	2
Customers Bout Sand BNB Cement - Rolling Tue 310ct 2017 at 2:05 pm		C00648	Donaldson Plant Hire	463,566	Action Required	4
		C00740	GRAHAM BAMBER	54.047	Artina Danulead	3
Created By:Offic Capland Add New Campaign Delete Campaign		1			Export Data	3 Send to MyCalls Send to Geogle Maps



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

