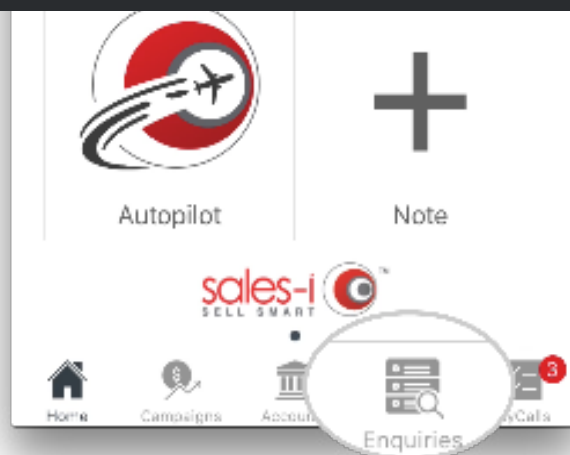


# HOW TO FIND YOUR TOP SPENDING CUSTOMERS - APPLE

Using the Full Picture Enquiry, you can easily see your top spending customers, as well as those which are most profitable or buy the biggest quantity of items from you.

Is your biggest spending customer also your most profitable? What have they bought from you? Are they up or down in spend? Enquiries is the place to answer these and any other questions you have about customer spend data.

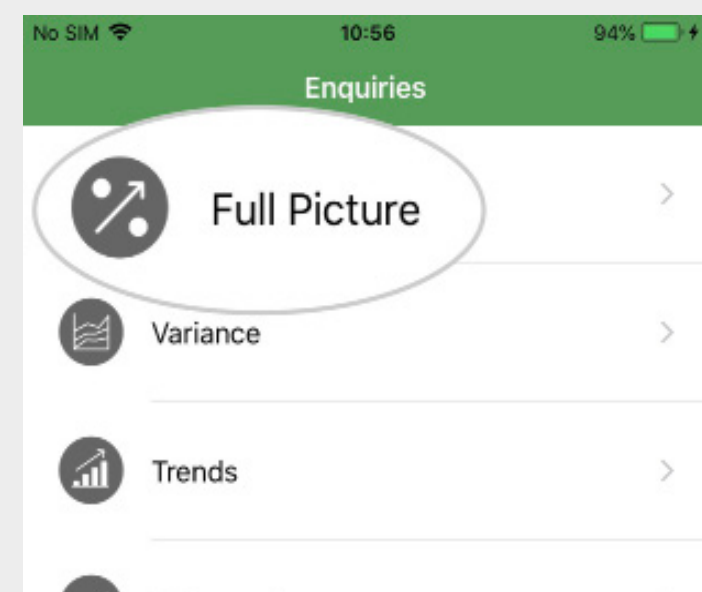
**01** From the navigation bar at the bottom of the screen, tap **Enquiries**.



**02** There are 4 enquiry types on the mobile app; Full Picture, Variance, Trends and Sales vs Gaps (as well as access to your existing Saved Enquiries and the option to begin by adding filters/changing your date range).

Each has its own benefit over the others and you can use different enquiries for different queries.

To find our biggest spending customers this YTD, we will be using the enquiry type **Full Picture**, and the default date range, **YTD**.

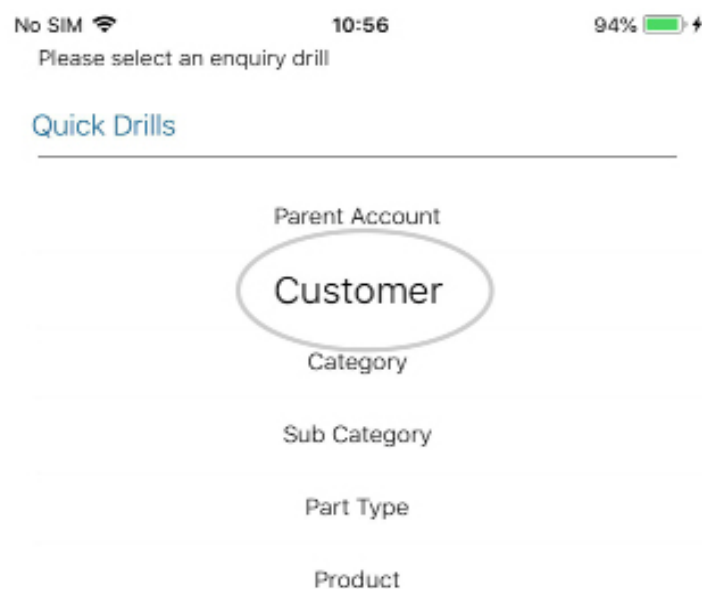


**03** The screen you can see now is your Enquiries home page. You'll see some Quick Drills at the top of the page.

Underneath this you'll see four main sections: Customer Analysis, Product Analysis, CRM Field and Transaction Analysis.

These are the four categories through which the system can drill into information for you depending on what you're trying to find out.

To see our biggest spending customer, tap the **Customer** line.



04

sales-i has now run this query for you, your biggest spending customers by sales Value are automatically sorted in descending order. The results can be seen in the table. You will also see other measurement types, such as Cost, Profit, GP and Quantity. (So, you can see how much profit you're getting from your biggest spending customer, or what quantity of items they're buying from you).

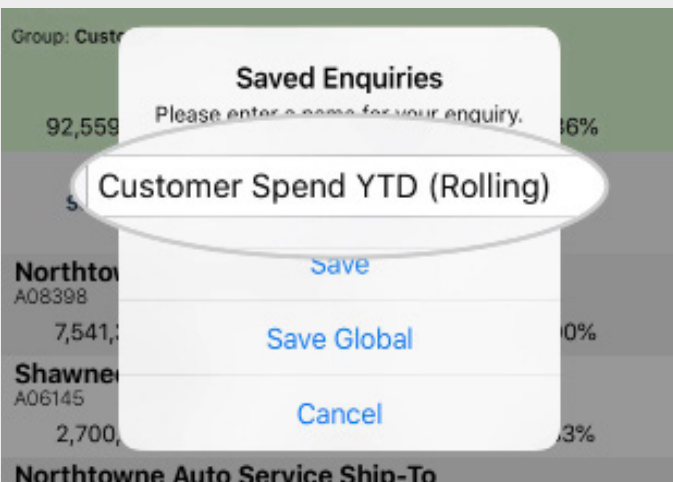
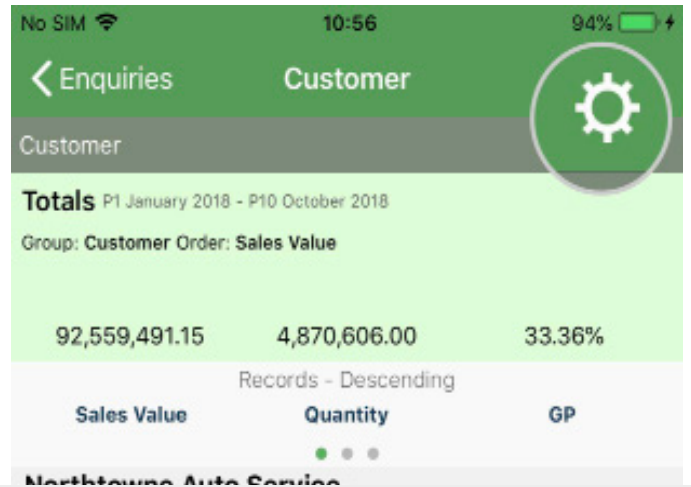
Swipe right or left on the table headers to view more measurements.

**Please Note:** If you want to change the order of these columns tap the **Settings** icon in the top right.

Totals P1 January 2018 - P10 October 2018		
Group: Customer Order: Sales Value		
Sales Value	Quantity	GP
92,559,491.15	4,870,606.00	33.36%
Records - Descending		
Northtowne Auto Service A08398	7,541,349.00	564,045.00 30.00%
Shawnee Service A06145	2,700,160.51	317,963.00 31.63%

05 You can also save this enquiry for future reference.

To do so, tap the **Settings icon** in the top right corner and then tap **Save Enquiry**.



06

Type in a name for this enquiry, e.g. 'Customer Spend YTD (Rolling)'

**Please Note:** It is good to be as clear as possible when naming saved enquiries, to help you understand what the enquiry will show when you come back to it at a later date.

07 Tap **Save**.

This saved enquiry will now be accessible via the **Saved Enquiries** button on your Home Page and will automatically update with the latest sales data.

**Please Note:** A Power User will have the option to **Save Global** – this globally saved enquiry will then appear on the Home Page for all users.

