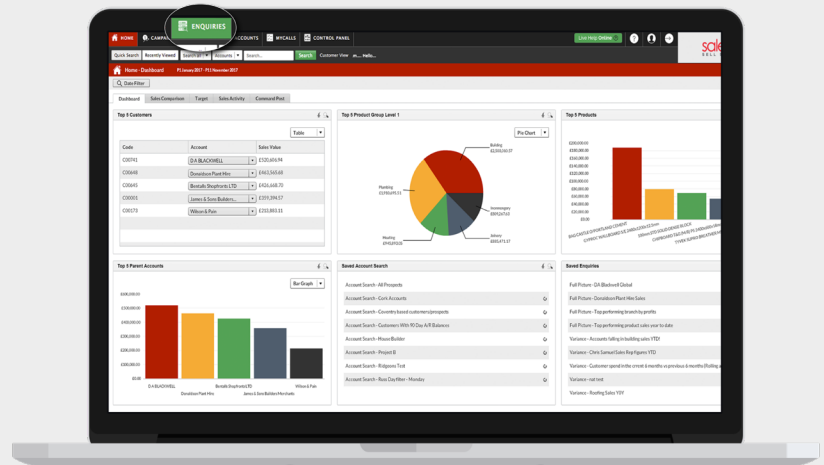


HOW TO FIND YOUR TOP SPENDING CUSTOMERS

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 black navigation bar at the top of the screen, click **Enquiries**.

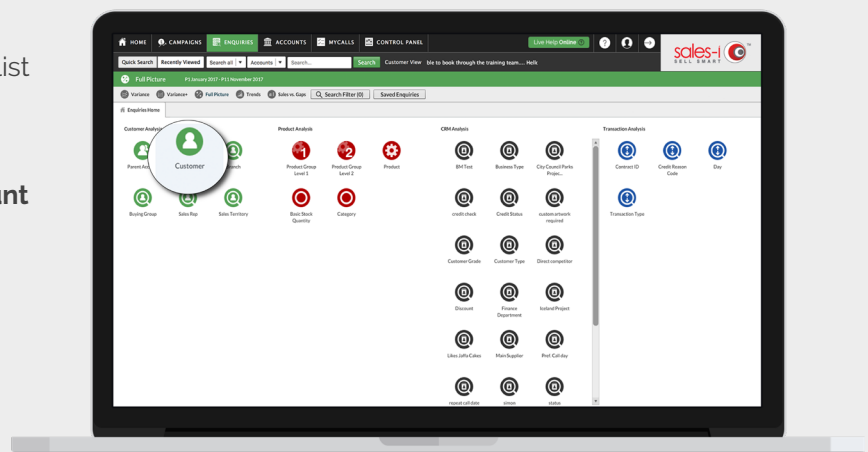


02 The **Full Picture** enquiry is the default selection from the 5 enquiry types. You can navigate to these different enquiries using the menu close to the top of the screen.

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

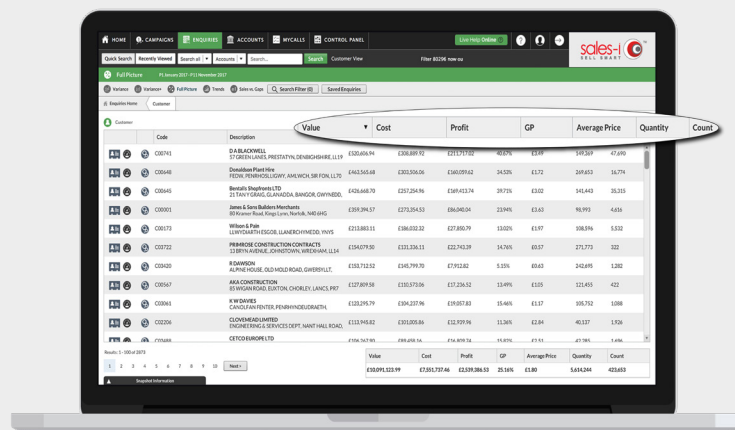
03 Click on the **Customer** bubble to view a list of your Customers.

Note: you can also use the **Parent Account** bubble to see overall spend for that customer, as opposed to spend for each delivery address separately.



04 Your biggest spending customers by sales **Value** are automatically sorted in descending order. 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).

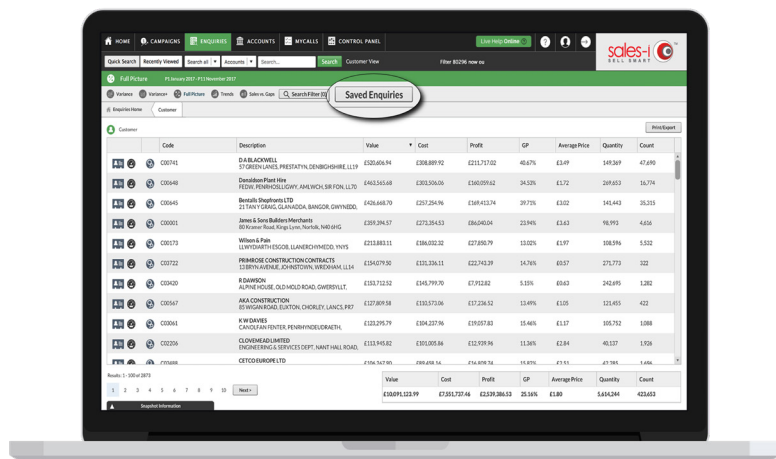
You can click on any of these table headers to sort by this measurement type in descending or ascending order.



OPTIONAL

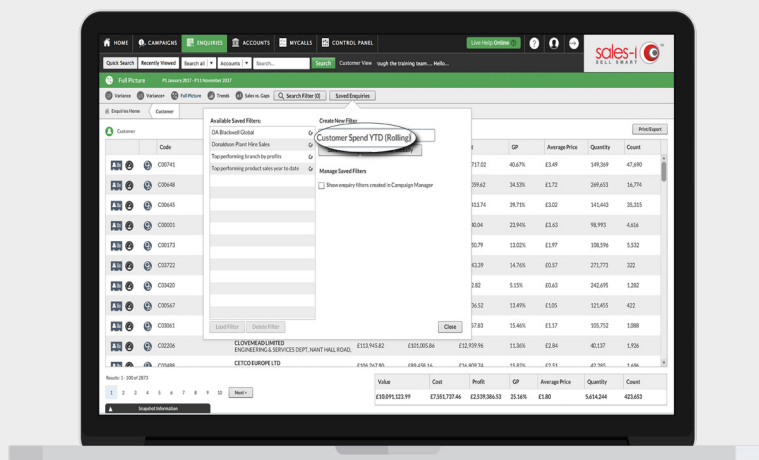
05 You can also Save this enquiry for future reference.

To do so, click **Saved Enquiries**.



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

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 Click **Save Filter**

This saved enquiry will now appear on your Home Page and will automatically update with the latest sales data.

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

