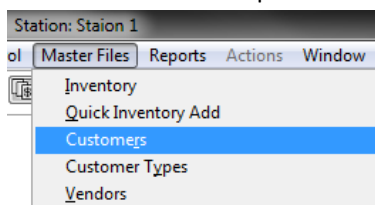


Using Construct a Query to find your top 100 customers

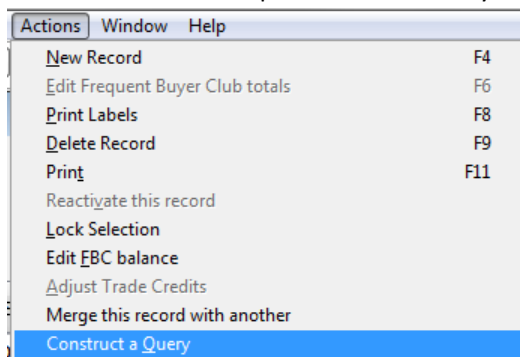
This process actually ranks your customers by how much they purchased and sends the results to an Excel spreadsheet. You may then decide to use the top 10, 50, 500 or whatever number you choose.

First we'll use Construct a Query to filter out the data in our Customer table so only those customers we want to report on will be shown.

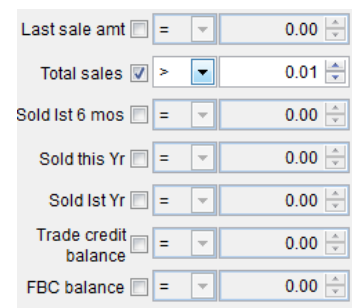
- Choose Master Files | Customers



- Next choose Actions | Construct a Query

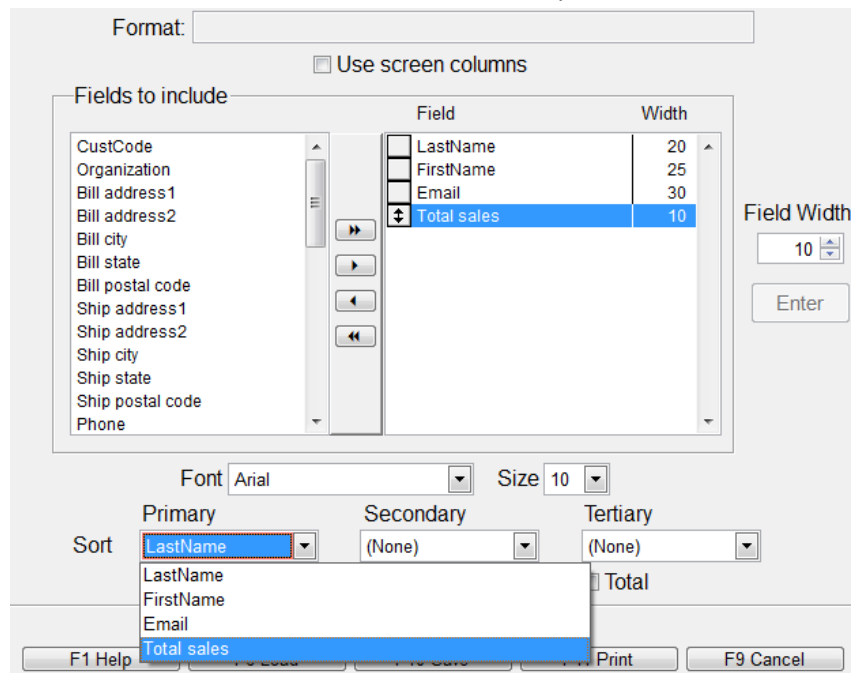


- On the Construct a Query screen set the values for Total Sold field with a checkmark, >, and 0.01. This ranks all your customers according to their total sales and will not include anyone who purchased a penny or less. You may adjust this to any number you like – for example if you are looking for the “Top 100 customers with purchases over \$40.00 then set this value to >= 40.00

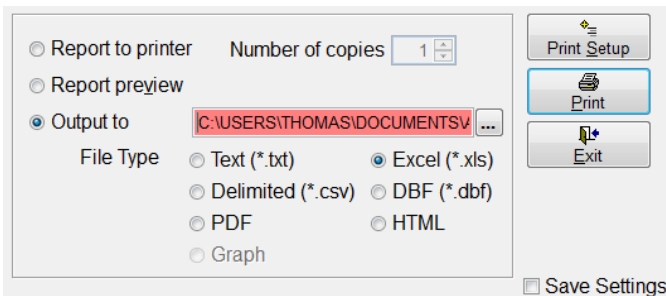
A screenshot of the 'Construct a Query' screen showing several filter criteria. Each criterion has a checkbox, a comparison operator, and a numerical value. The 'Total sales' criterion is checked, has a greater-than (>) operator, and a value of 0.01. Other criteria include 'Last sale amt', 'Sold 1st 6 mos', 'Sold this Yr', 'Sold 1st Yr', 'Trade credit balance', and 'FBC balance', all with an equals (=) operator and a value of 0.00.

- Choose F12 Run
- You may be prompted to “name the query” if this is something you’ll do over and over it may be easier to name the query so you don’t have to reset all the conditions on the screen each time. If this is not done often or the criterion changes nearly every time... then you may elect to not name (save) the query.
In either case when you run the query your Customer List page will be filtered to match the criterion you choose.
- Next we’ll choose F11 Print

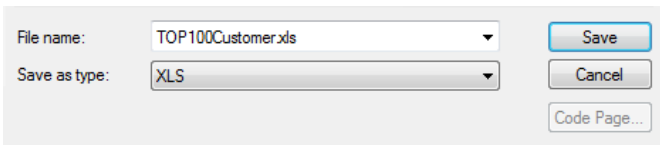
- The following screen allows you choose what information will show in your report. For this example I am looking for Last Name, First Name, and email address. I also include the “Total Sales” field so I have this as a sort option.



- When I choose F11 print on this screen I may be prompted to save the report format. The same rules as above apply here – it is your choice to save it or recreate it each time.
- On print dialog I’ll choose to export to an Excel spreadsheet



I click the ellipsis [...] button and name the output file. I called mine “TOP100Customers.xls”



- I choose Print to complete the process and send the file to the designated folder – If you did not set a directory the Program Files\Anthology is used by default.