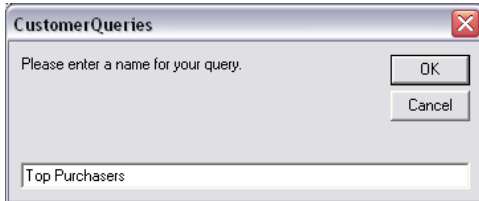


top purchasers query

Generate a list of clients that have met or exceeded a predetermined spending level.

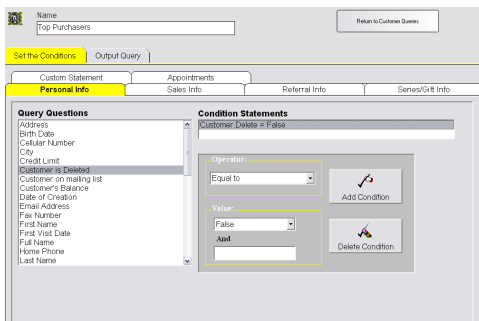
Add the Query

1. From the SalonBiz®/SpaBiz® menu bar, click on the Communications icon (Envelope).
2. Click on the Queries button.
3. Click the Add button.
4. Type in the name of the query.
5. Click the OK button.

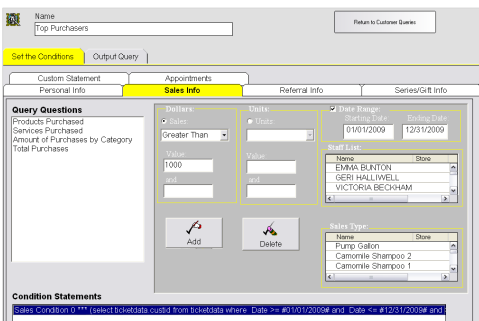


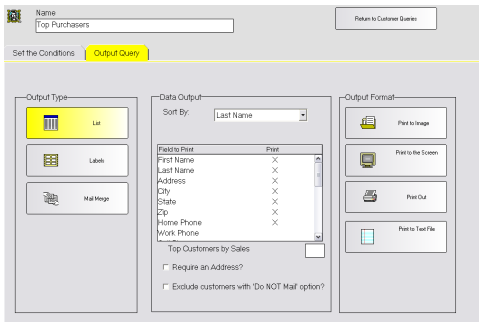
Set the Conditions

1. In the Personal Info tab, highlight by clicking once on Customer is Deleted in the Query Questions field.
2. Select Equal to in the Operator drop down menu.
3. Select False in the Value drop down menu.
4. Click the Add Condition button. You should see the condition in the box under Condition Statements. *Adding this condition will eliminate those clients who have been previously deleted from your database from the list.*



5. Click the Sales Info tab.
6. There are three options to search for top purchasers in reference to dollars spent, products, services and all purchases.
 - To search for products only, click on Products Purchased in the Query Questions field.
 - To search for services only, click on Services Purchased in the Query Questions field.
 - To search for all purchases including gift certificates and series do not select any statements in the query questions field.
7. In the Dollars field, click in the Sales field (you will see a black dot).
8. In the Dollars field, select Greater Than in the drop down menu.
9. Type in the desired dollar amount in the Value field. Note: Queries do not have “top” functionality. You will have to set the parameters and then narrow down the results by increasing the dollar amount until you generate the right number of customers.
10. You may enter a date range in the Date Range field. Setting a date range is optional. If you choose to set a date range make sure there is a check in the Date Range box.
11. Click the Add button. You should see the condition in the box under Condition Statements.





Output Query

1. Click the Output Query tab.
2. Select the desired output in the Output Type field by clicking once on the box. The box will be highlighted yellow.
3. If you are printing labels, select a label from the drop down menu.
 - If you are planning on mailing to the list place a check in the box Require an Address?
 - If you are planning on mailing to the list place a check in the box Exclude customers with 'Do NOT mail' option?
4. In the Field to Print box, double click on the fields you wish to print. There should be an "X" in the Print column.
5. Select by clicking once on the desired output in the Output Format field. Until you familiarize yourself with queries it is good practice to print to the screen. This allows you to check that you have properly set the conditions without wasting paper or labels.

❖ Reports with top functionality can be located in the Reports icon.

