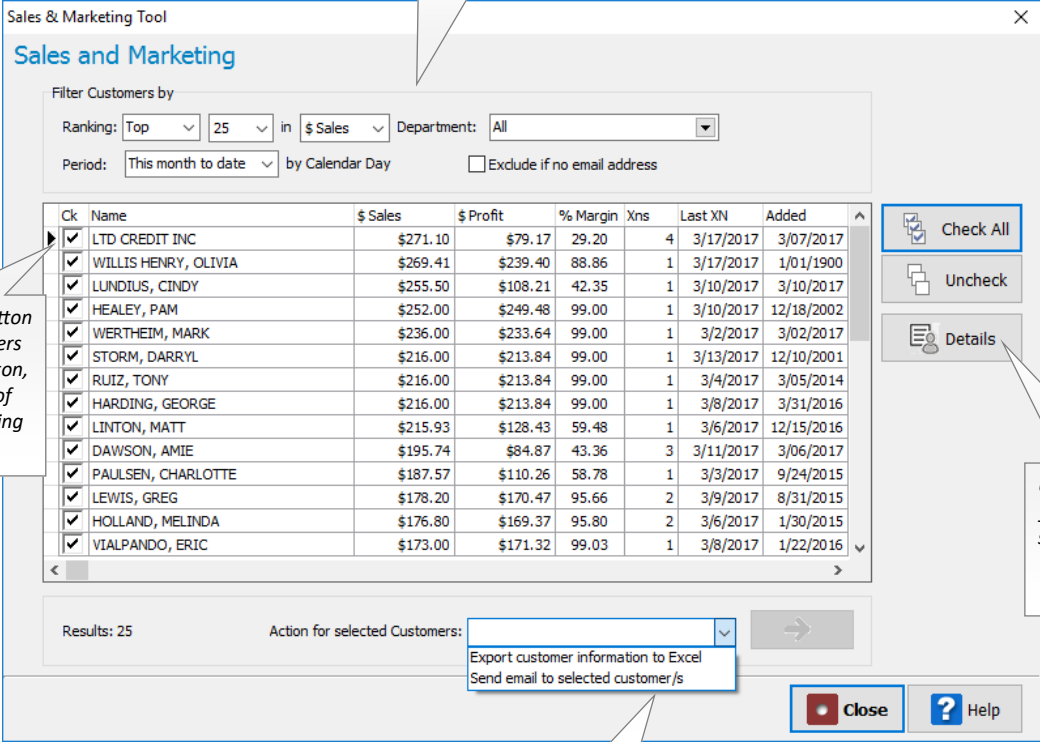## Sales and Marketing Tool

This feature gives you a fast and very useful way to identify, and market to, your top (or bottom) Customers in sales, profit or number of transactions, for any (or all) departments by date range. Additional Sales Detail is available giving you an insight into sales profits, statistics and trends.

From the POS Register main menu, choose **Tools > Sales and Marketing Tool.**

Use these filters to display a customer list of your choice.

*Use the **Check All** button to select all customers with a push of a button, or select a subset of customers by checking manually.*

*Use the **Details** button for one or more of the selected customers for additional sales data, statistics and trends.*

Sales and Marketing

Filter Customers by

Ranking: Top | 25 | in $ Sales | Department: All

Period: This month to date | by Calendar Day | ☐ Exclude if no email address

Ck	Name	$ Sales	$ Profit	% Margin	Xns	Last XN	Added
✔	LTD CREDIT INC	$271.10	$79.17	29.20	4	3/17/2017	3/07/2017
✔	WILLIS HENRY, OLIVIA	$269.41	$239.40	88.86	1	3/17/2017	1/01/1900
✔	LUNDIUS, CINDY	$255.50	$108.21	42.35	1	3/10/2017	3/10/2017
✔	HEALEY, PAM	$252.00	$249.48	99.00	1	3/10/2017	12/18/2002
✔	WERTHEIM, MARK	$236.00	$233.64	99.00	1	3/2/2017	3/02/2017
✔	STORM, DARRYL	$216.00	$213.84	99.00	1	3/13/2017	12/10/2001
✔	RUIZ, TONY	$216.00	$213.84	99.00	1	3/4/2017	3/05/2014
✔	HARDING, GEORGE	$216.00	$213.84	99.00	1	3/8/2017	3/31/2016
✔	LINTON, MATT	$215.93	$128.43	59.48	1	3/6/2017	12/15/2016
✔	DAWSON, AMIE	$195.74	$84.87	43.36	3	3/11/2017	3/06/2017
✔	PAULSEN, CHARLOTTE	$187.57	$110.26	58.78	1	3/3/2017	9/24/2015
✔	LEWIS, GREG	$178.20	$170.47	95.66	2	3/9/2017	8/31/2015
✔	HOLLAND, MELINDA	$176.80	$169.37	95.80	2	3/6/2017	1/30/2015
✔	VIALPANDO, ERIC	$173.00	$171.32	99.03	1	3/8/2017	1/22/2016

Results: 25

Action for selected Customers:

Export customer information to Excel
Send email to selected customer/s

[Check All] [Uncheck] [Details] [Close] [Help]

Options to export the selected information to Excel or send an email to the selected customers.

ⓘ Details

By Department tab: The Details screen provides you with additional information and can be displayed for a single, or multiple customers. The example below shows sample details from the top 25 customers in all departments.

Detailed Sales Information ✕

Sales Detail

Include
⦿ Selected Customers only   ◯ All Customers in list of results

By Department   Statistics   Trends

Click on any header name to sort by that field.

Department	$ Sales	$ Profit	% Margin	% of All Sales	% of All Profit
FedEx	$1,143.54	$560.03	48.97%	26.39%	17.94%
Greeting Cards	$4.95	$2.48	50.00%	0.11%	0.08%
Labor	$6.75	$6.75	100.00%	0.16%	0.22%
Mailbox Services	$2,122.00	$2,100.29	98.98%	48.96%	67.29%
Metered Mail	$409.65	$123.42	30.13%	9.45%	3.95%
Notary	$45.00	$30.00	66.67%	1.04%	0.96%
Other Shipper	$178.63	$104.79	58.66%	4.12%	3.36%
Packing Supply	$44.91	$30.88	68.75%	1.04%	0.99%
UPS	$378.61	$162.48	42.91%	8.74%	5.21%
Totals	**$4,334.04**	**$3,121.11**	**72.01%**	**100%**	**100%**

[Transactions]

*Itemized transactional detail is available. Highlight a specific department and click the **Transactions** button to get a detailed list of transactions for the date range entered on the previous screen.*

[⏺ Close]   [❓ Help]

Detailed Transaction Information ✕

Transaction Detail

Customer: All ▼

Date	Description	Qty	Retail	Wholesale
03/06/2017 11:37:37	Declared value: $145.00	1	$5.50	$2.00
03/06/2017 11:37:37	FedEx Economy International	1	$208.78	$85.10
03/06/2017 17:04:28	FedEx Ground Home Delivery	1	$41.05	$23.22
03/06/2017 17:04:28	FedEx Ground Home Delivery	1	$26.31	$15.89
03/06/2017 17:04:28	FedEx Ground Home Delivery	1	$26.31	$15.89
03/07/2017 12:37:39	FedEx Ground Home Delivery	1	$24.25	$14.37
03/09/2017 10:57:54	Declared value: $2300.00	1	$30.82	$7.82
03/09/2017 10:57:54	FedEx Ground	1	$45.17	$23.05
03/11/2017 14:27:24	FedEx Ground Home Delivery	1	$69.83	$38.98
03/14/2017 14:10:10	FedEx 2Day	1	$91.85	$45.25
03/14/2017 18:06:43	FedEx Ground	1	$53.02	$26.76

*Example **Transactional Detail** for the FedEx department.*

[⏺ Close]   [❓ Help]

Statistics tab: This tab shows how sales numbers for the selected Customers compare against those of all your store's customers.

Detailed Sales Information

Sales Detail

Include
- ● Selected Customers only   ○ All Customers in list of results

By Department | Statistics | Trends

Catergory	This Group	All Store Customers
# Customers analyzed	25	259
$ Sales Total	$4,334.04	$9,601.02
$ Sales per customer	$173.36	$37.07
$ Sales avg. per transaction	$123.83	$34.29
$ Profit Total	$3,121.11	$5,707.51
$ Profit per customer	$124.84	$22.04
$ Profit avg. per transaction	$89.17	$20.38
% Profit margin	72.01%	59.45%
# Transaction count	35	280
# Transaction avg. per customer	1.4	1.0811

Close   Help

Trends tab: This tab displays a line graph for any selected date range. By default it aggregates sales for all departments, but you can select a specific department from the drop down list.

Detailed Sales Information

Sales Detail

Include
- ● Selected Customers only   ○ All Customers in list of results

By Department | Statistics | Trends

From 3/ 1/2017 To 3/28/2017   All Departments

Close   Help

Email to Customers: Choose this option if you wish to send an email to the selected customers. Attachments and HTML are allowed. The **Send From** email address is the email address you have entered in PostalMate under **Tools > PostalMate Settings > Store Info**.

Sales & Marketing Tool

Sales and Marketing

Filter Customers by

Ranking: Top | 25 | in $ Sales | Department: All

Period: This month to date | by Calendar Day | ☑ Exclude if no email address

Ck	Name	$ Sales	$ Profit	% Margin	Xns	Last XN	Added
☑	WILLIS HENRY, OLIVIA	$269.41	$239.40	88.86	1	3/17/2017	1/01/1900
☑	LUNDIUS, CINDY	$255.50	$108.21	42.35	1	3/10/2017	3/10/2017
☑	WERTHEIM, MARK	$236.00	$233.64	99.00	1	3/2/2017	3/02/2017
☑	HARDING, GEORGE	$216.00	$213.84	99.00	1	3/8/2017	3/31/2016
☑	LINTON, MATT	$215.93	$128.43	59.48	1	3/6/2017	12/15/2016
☑	DAWSON, AMIE	$195.74	$84.87	43.36	3	3/11/2017	3/06/2017
☑	PAULSEN, CHARLOTTE	$187.57	$110.26	58.78	1	3/3/2017	9/24/2015
☑	ASAM, ANTHONY	$121.73	$52.25	42.92	1	3/15/2017	1/11/2017
☑	SILVA, MARIELLA	$107.25	$32.95	30.72	3	3/16/2017	3/02/2017
☑	SANDOVAL, MIGUEL	$97.12	$56.23	57.90	1	3/15/2017	3/15/2017
☑	GONZALES, LIONEL P.	$90.00	$89.10	99.00	1	3/2/2017	3/08/2016
☑	IBARRA, ALAN	$87.13	$36.30	41.66	2	3/13/2017	11/23/2015
☑	ROJAS, KIM	$85.70	$29.08	33.93	2	3/11/2017	11/17/2016
☑	BARNER, KIMBERELY	$77.92	$40.28	51.69	2	3/9/2017	12/09/2016

Check All
Uncheck
Details

Results: 25 | Action for selected Customers:

Export customer information to Excel
Send email to selected customer/s

Close | Help

Check this box and the list will only display customers that you have entered an email address for.

Choose Send email to selected customer/s.

Email to Customers

Email to Customers

To: Customers | ☑ Copy email to store

Subject:

Attachment:

Body: (HTML is allowed)

Send test email to store

Send | Cancel | Help

Option to copy the email you are sending to your store.

For email, this screen will pop up. You can include attachments if you like.

If you're experienced with HTML, you can use it here. Be sure to include the entire document structure (HTML version info, header and body).

Click here to send a test email