SWS - Forms in the Report Menu - System Reports - Activity Reports - Customer Activity

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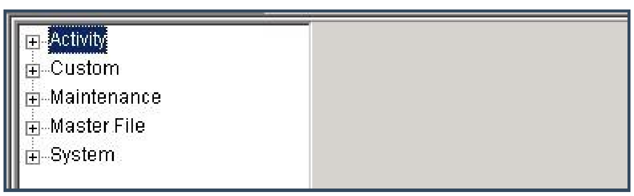
The Customer Activity Report is the most detailed Report available for obtaining Customer account activity information. The Customer Activity Report includes information on most Customer activities including opening, closing, out of service, and comments. It excludes instances where someone accessed the Customer record only for viewing or editing. The Customer Activity Report displays results by Contract Number, and then by the Alarm Report Number.

Generating a Customer Activity Report

Perform the following steps to generate a Customer Activity Report:

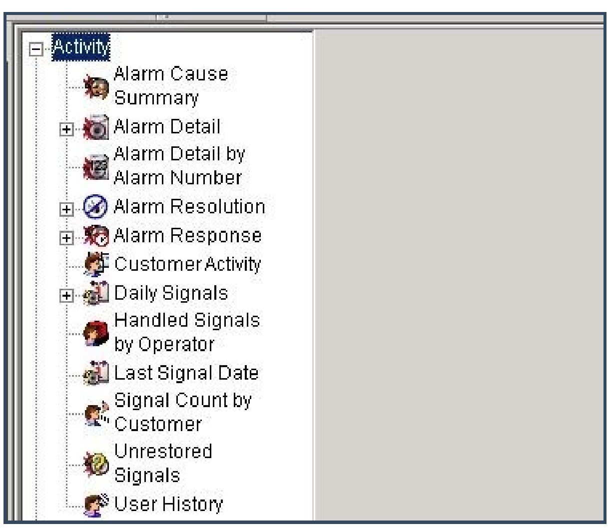
1. Navigate to the Reports menu, and select "System Reports".

   Result: The "System Reports" Navigation Tree displays as shown in the following screenshot:

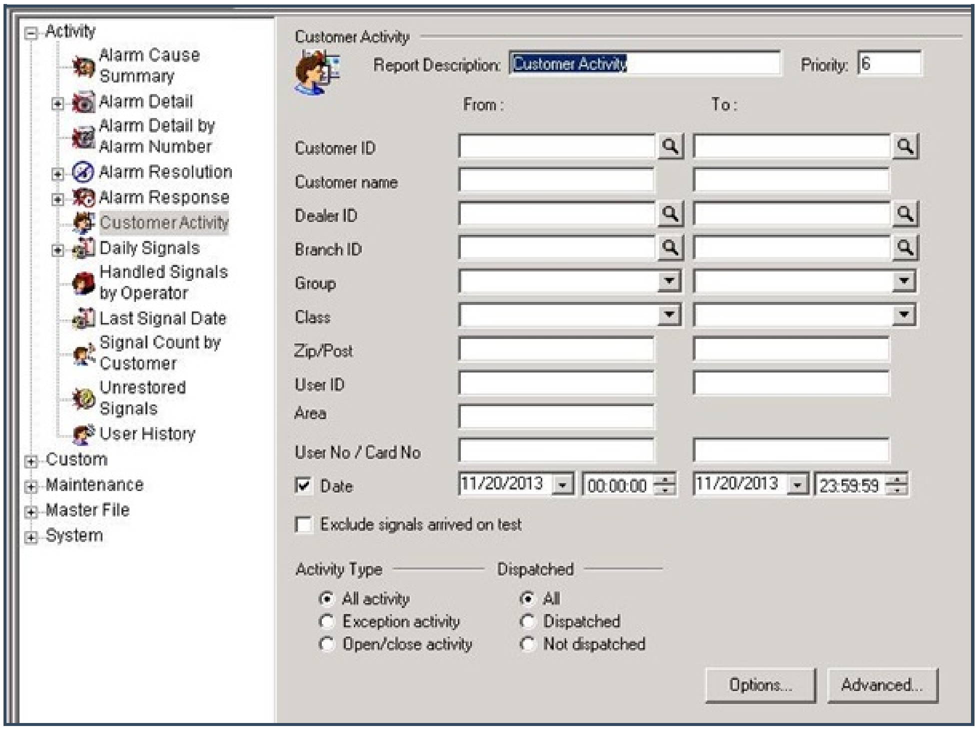
2. Click the "Activity" Navigation Tree Node.

   Result: The Activity section of the Navigation Tree expands as displayed in the following screenshot:

3. Double-click the "Customer Activity" Navigation Tree Node.

Result: The Customer Activity Report form displays as shown in the following screenshot:



4. If you want, apply any of the following parameters to your Customer Activity Report:

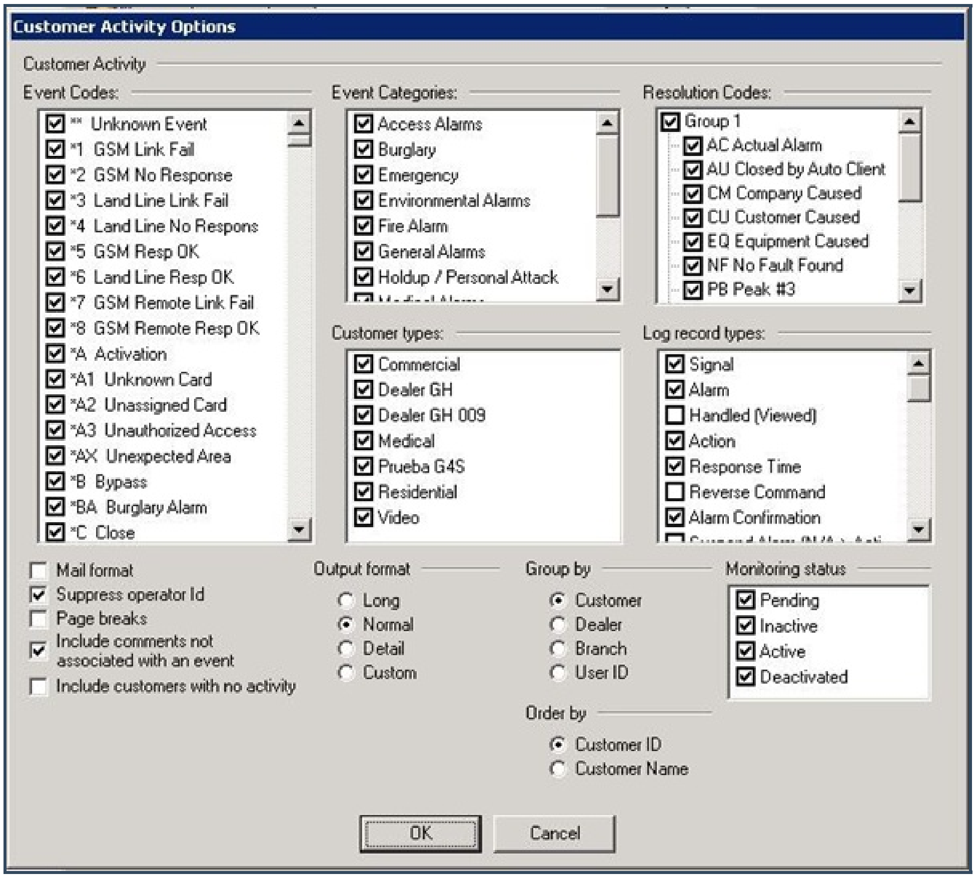
- Customer ID
- Customer Name
- Dealer ID
- Branch ID
- Group
- Class
- Zip/Post
- User ID
- Area
- User No/Card No
- Date
- Time

5. To run a Customer Activity Report, select a beginning value from the "From:" field and an ending value from the "To:" field. The system will report on all items in the selected category that fit between the beginning and ending values.
6. Select one of the options in the "Activity Type" area of your screen to determine the types of Customer activity that will be included in your Report.
7. Select one of the options in the "Dispatched" area of your screen to determine whether the Alarms included in

your Report should be limited to those for which an Authority was dispatched.

8. Click "Options".

   Result: The "Customer Activity Options" window displays as shown in the following screenshot:

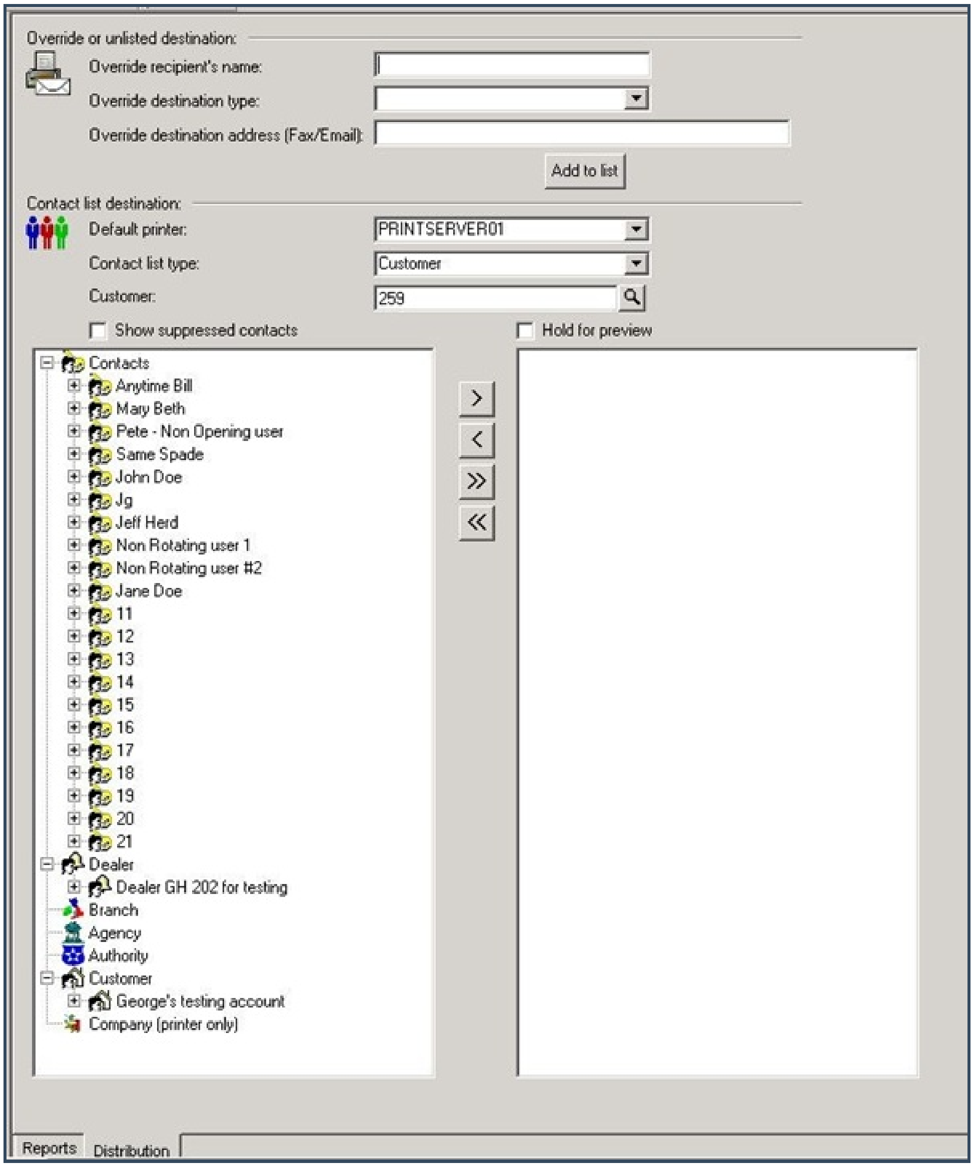


9. Deselect Event Codes, Event Categories, Customer types, Resolution Codes, Log record types, and Monitoring statuses that you want to exclude from your Customer Activity Report.
10. The "Suppress operator Id" and "Include comments not associated with an event" items display as preselected. If you want to include the "Mail format", "Page breaks", and "Include customers with no activity" options, select those items.
11. The "Normal" option in the "Output format" area of the window displays as preselected. If you want to select another "Output format" item, select that item instead.
12. The "Customer" option in the "Group by" area of the window displays as preselected. If you want to group your Report by "Dealer", "Branch", or "User ID", select that option instead.
13. The "Customer ID" option in the "Order by" area of the window displays as preselected. If you want to order your Report by "Customer Name", select that option instead.
14. Click "OK".

Result: The "Customer Activity Options" window closes, and the system returns the user to the Customer Activity form.

15. Once you have entered all the parameters for your Report, click "Next".

    Result: The Distribution Tab displays as shown in the following screenshot:



16. For instructions on distributing your Report, refer to the "System Reports" document.

The Advanced Button

Some Report forms include an Advanced Settings button. Clicking this button results in the display of an Advanced Settings window. Use the "Customer user defined fields" form in the Tools menu, under Options, and Account Creation/Maintenance to customize Report fields on Advanced Settings windows.

For instructions on how to access and use the form, refer to the "System Reports" document.