

SWS - Forms in the Report Menu - System Reports - Custom Reports - Dealer Billing Generate

Last Modified on 08/01/2024 3:16 pm EDT

Note: The Customer Signal Count Generator Report must be run before the Dealer Billing Generate Report to generate activity-based charges.

Perform the following steps to generate a Dealer Billing Generate Report:

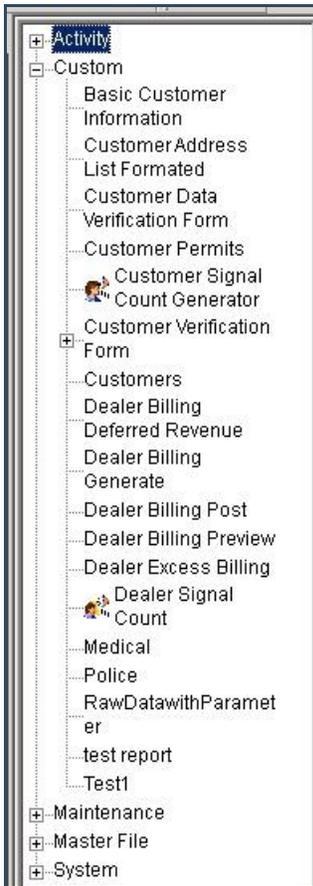
1. Navigate to the Reports menu, and select "System Reports".

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



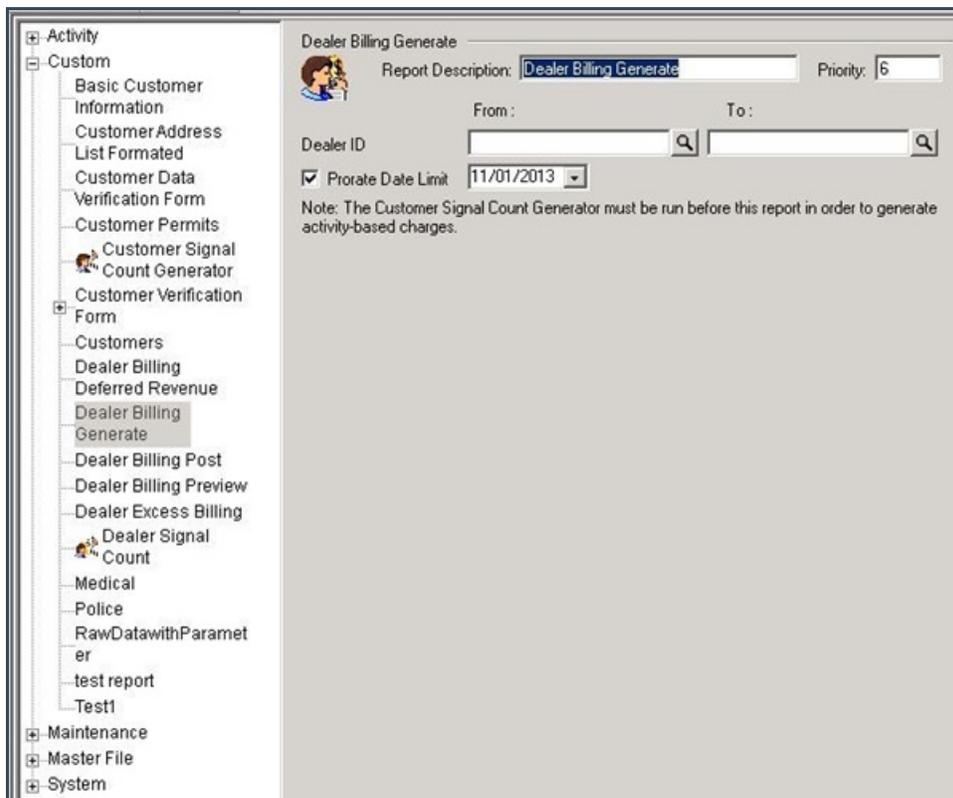
2. Click the "Custom" Navigation Tree Node.

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



3. Double-click the "Dealer Billing Generate" Navigation Tree Node.

Result: The Dealer Billing Generate Report form displays as shown in the following screenshot:



4. To run a Dealer Billing Generate Report, select a beginning Dealer ID value from the "From:" field and an ending value from the "To:" field. The system will report on all items that fit between the beginning and ending value.
5. If you want, select the "Prorate Date Limit" checkbox and select a proration end date from the dropdown menu.
6. Note: selecting the Prorate Date Limit option ensures that any recurring monthly charges provided for less than a full month will not be prorated after the date you indicate.
7. Click "Next".

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

Override or unlisted destination:

Override recipient's name:

Override destination type:

Override destination address (Fax/Email):

Contact list destination:

Default printer:

Contact list type:

Customer:

Show suppressed contacts Hold for preview

Contacts

- Anytime Bill
- Mary Beth
- Pete - Non Opening user
- Same Spade
- John Doe
- Jg
- Jeff Herd
- Non Rotating user 1
- Non Rotating user #2
- Jane Doe
- 11
- 12
- 13
- 14
- 15
- 16
- 17
- 18
- 19
- 20
- 21

Dealer

- Dealer GH 202 for testing

Branch

Agency

Authority

Customer

- George's testing account
- Company (printer only)

Reports Distribution

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