SWS - Forms in the Report Menu - System Reports - Maintenance Reports - Customer Add/Delete

Last Modified on 08/02/2024 1:46 pm EDT

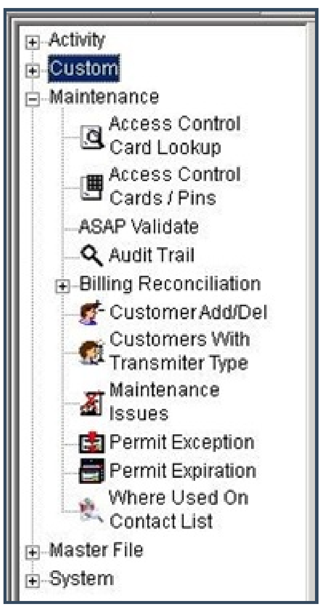
Perform the following steps to generate a Customer Add/Delete Report:

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

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

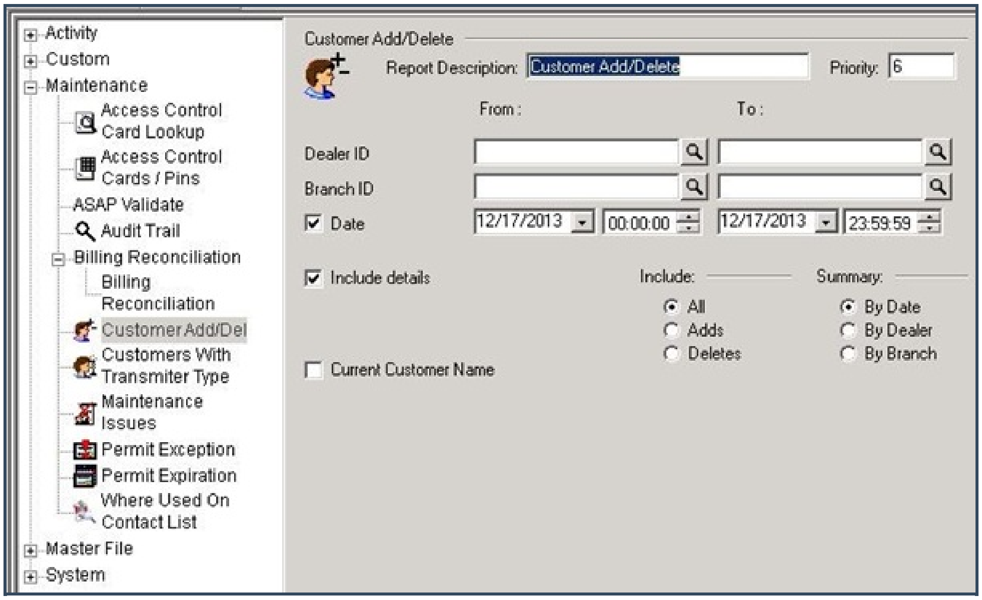
2. Click the "Maintenance" Navigation Tree Node.

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



3. Double-click "Customer Add/Delete".

   Result: The "Customer Add/Delete" form displays as shown in the following screenshot:

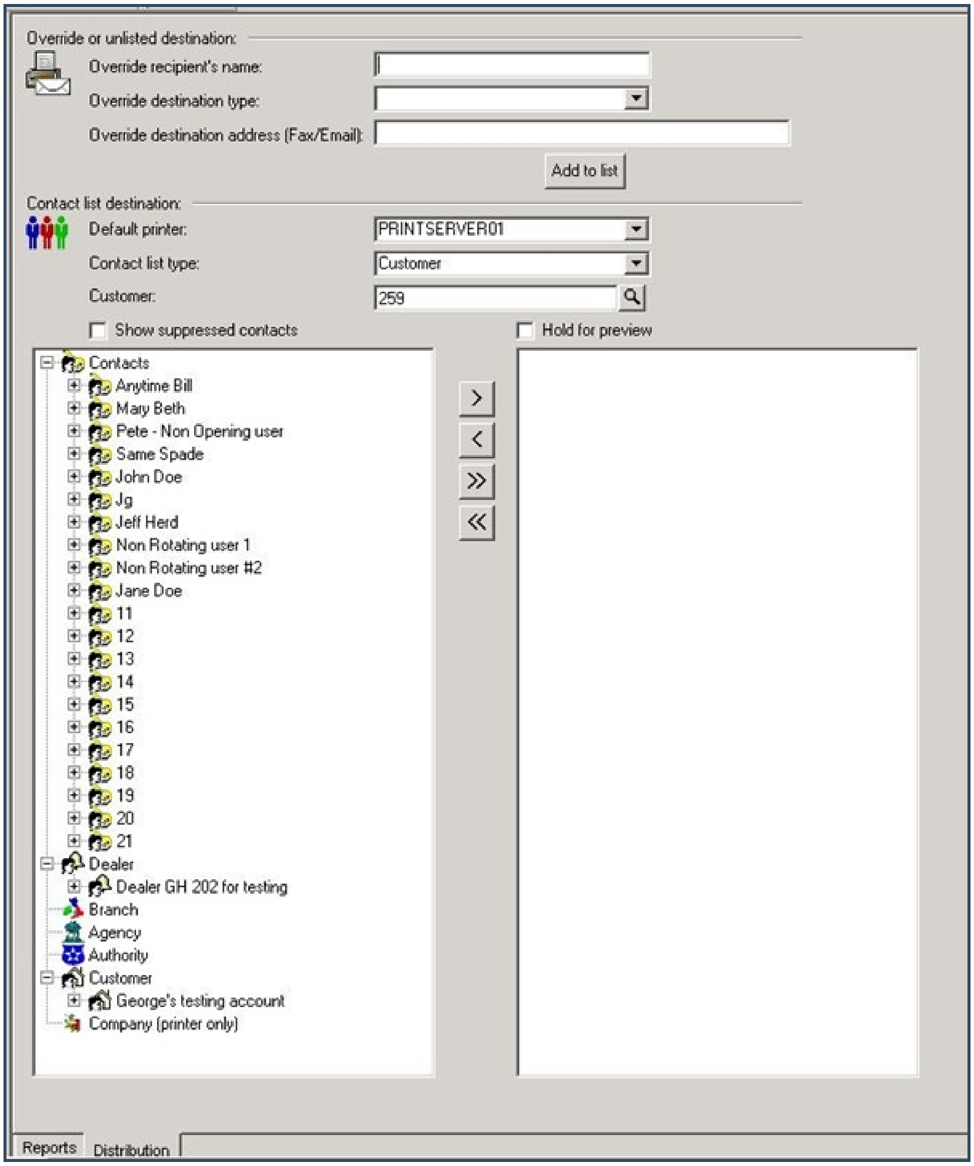


4. If you want, apply either of the following parameters to your Customer Add/Delete Report:

- Dealer ID
- Branch ID

5. To run a Customer Add/Delete Report, enter a beginning value in the "From:" field and an ending value in the "To:" field. The system will report on all items in the selected category that fit between the beginning and ending values.
6. The "Include details" checkbox displays as preselected. If you want to limit the amount of information that displays in your Report, deselect the "Include details" checkbox option.
7. If you want, select the "Current Customer Name" checkbox option.
8. The "All" checkbox in the "Include:" area of the window displays as preselected. If you want you want to limit your Report to only "Adds" or "Deletes", select that option instead.
9. The "By Date" checkbox in the "Summary:" area of the window displays as preselected. If you want your Report results to be summarized "By Dealer" or "By Branch", select that option instead.
10. Once you have entered all the parameters for your Report, click "Next".

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



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