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

Last Modified on 08/05/2024 2:44 pm EDT

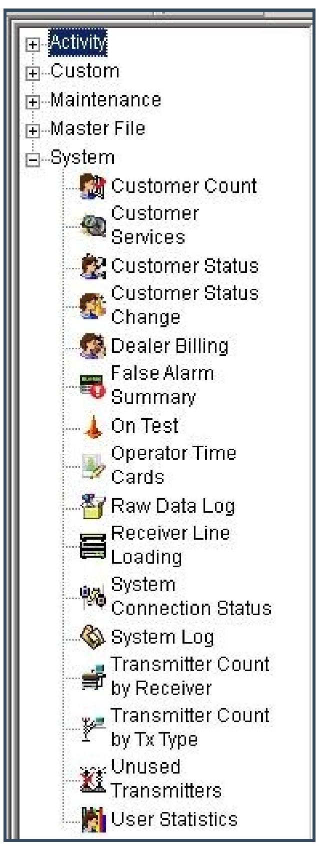
Perform the following steps to generate a Customer Count Report:

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

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

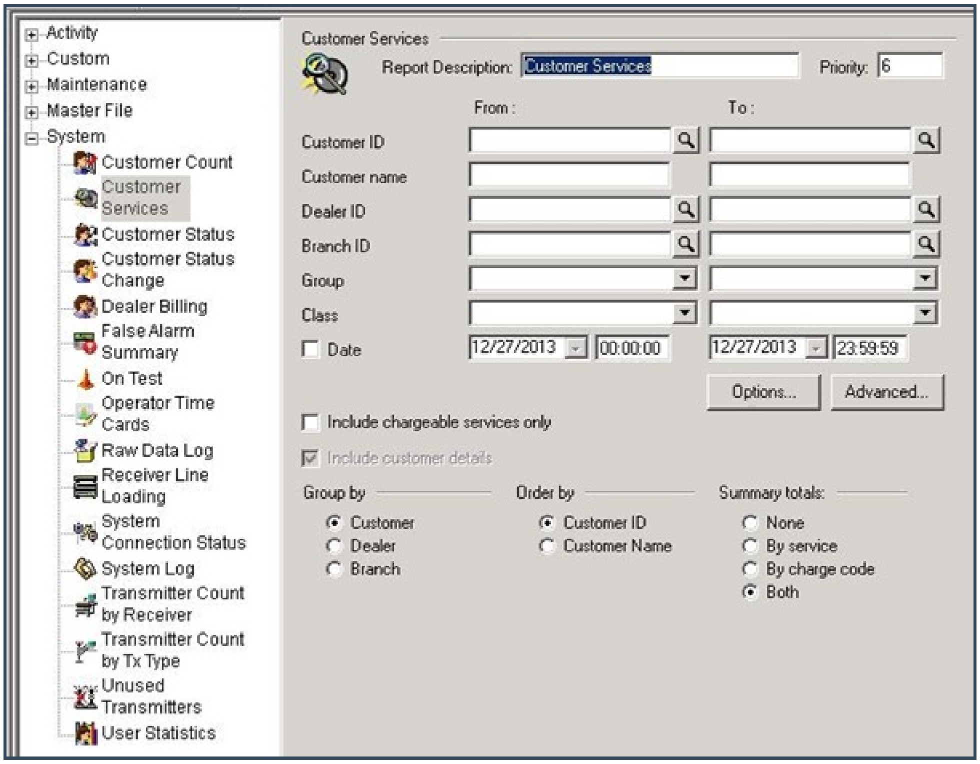
2. Click the "System File" Navigation Tree Node.

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



3. Double-click "Customer Count".

Result: The "Customer Count" form displays as shown in the following screenshot:

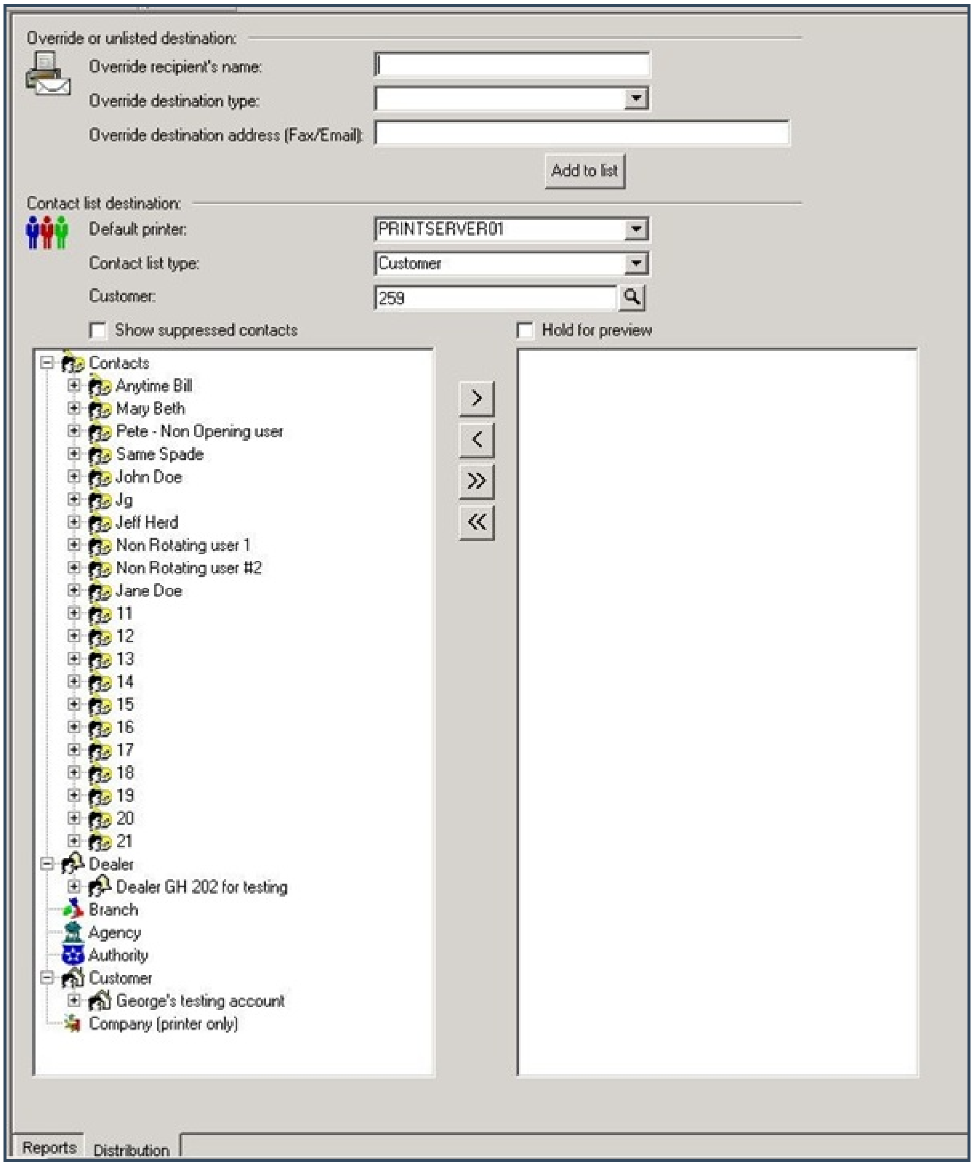


4. If you want, apply any of the following parameters to your Customer Count Report:

- Customer ID
- Customer Name
- Dealer ID
- Branch ID
- Group
- Class Wildcard
- Class

5. To run a Customer Count Report, enter a beginning value in the "From:" field and an ending value in the "To:" field. The system will report on all items that fit between the beginning and ending values.
6. If you want, select the "Use wildcard for class" checkbox.
7. If you want, select the "Start Date" checkbox and enter a date and time range.
8. If you want to maximize the amount of information to display in your Report, select the "Include details" checkbox.
9. Items in the "Monitoring status" area of the form display as preselected. If you want, deselect the items you want to exclude from your Report.
10. If you want to group items in your Report by a specific subject, select the item from the "Group By" area of the form.
11. The "Customer Name" option displays as preselected in the "Order By" area of the form. If you want to order your Report by Customer ID, select that item instead.
12. Click "Next".

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



13. 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.