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

Last Modified on 08/05/2024 2:52 pm EDT

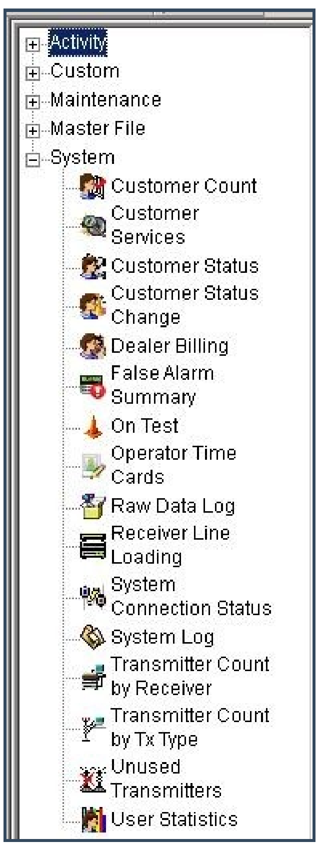
Perform the following steps to generate a Customer Services Report:

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

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

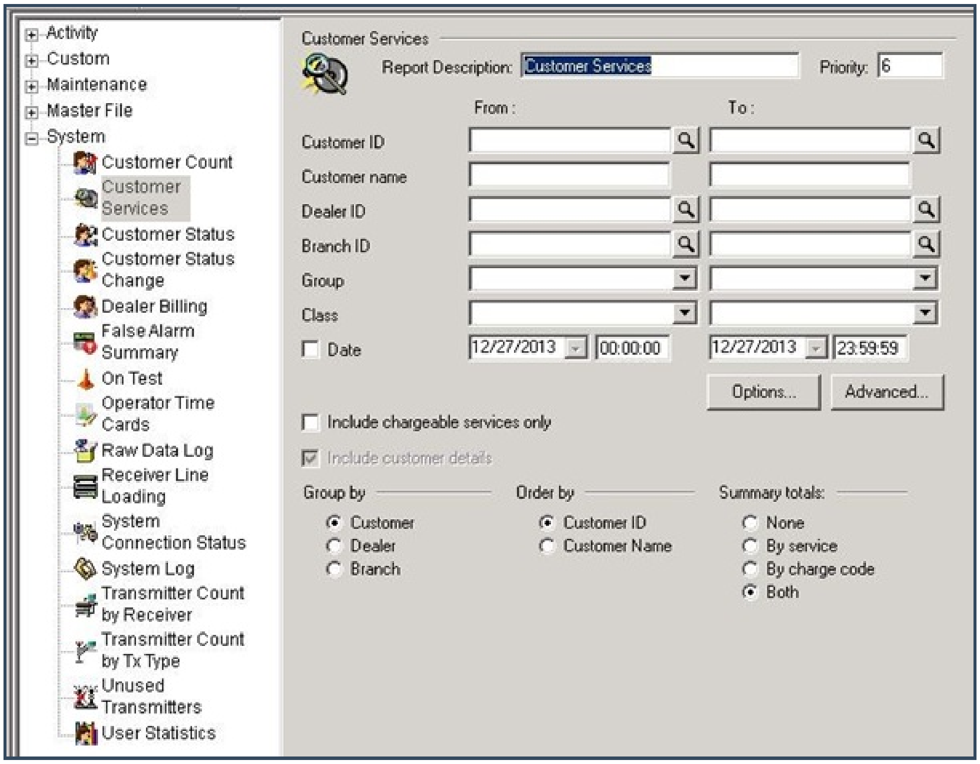
2. Click the "System File" Navigation Tree Node.

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



3. Double-click "Customer Services".

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



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

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

5. To run a Customer Services 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 "Date" checkbox and enter a date and time range.
7. If you want to limit your Report to chargeable services, select the "Include chargeable services only" checkbox.
8. The "Customer" option in the "Group by" area of the form displays as preselected. If you want, select the "Dealer" or "Branch" checkbox instead.
9. The "Customer ID" option in the "Order by" area of the form displays as preselected. If you want, select the "Customer Name" checkbox instead.
10. The "Both" option in the "Summary totals:" area of the form displays as preselected. If you want the summary totals that display in your Report to total "By service" or "By charge code", select that option instead.
11. Click "Options".

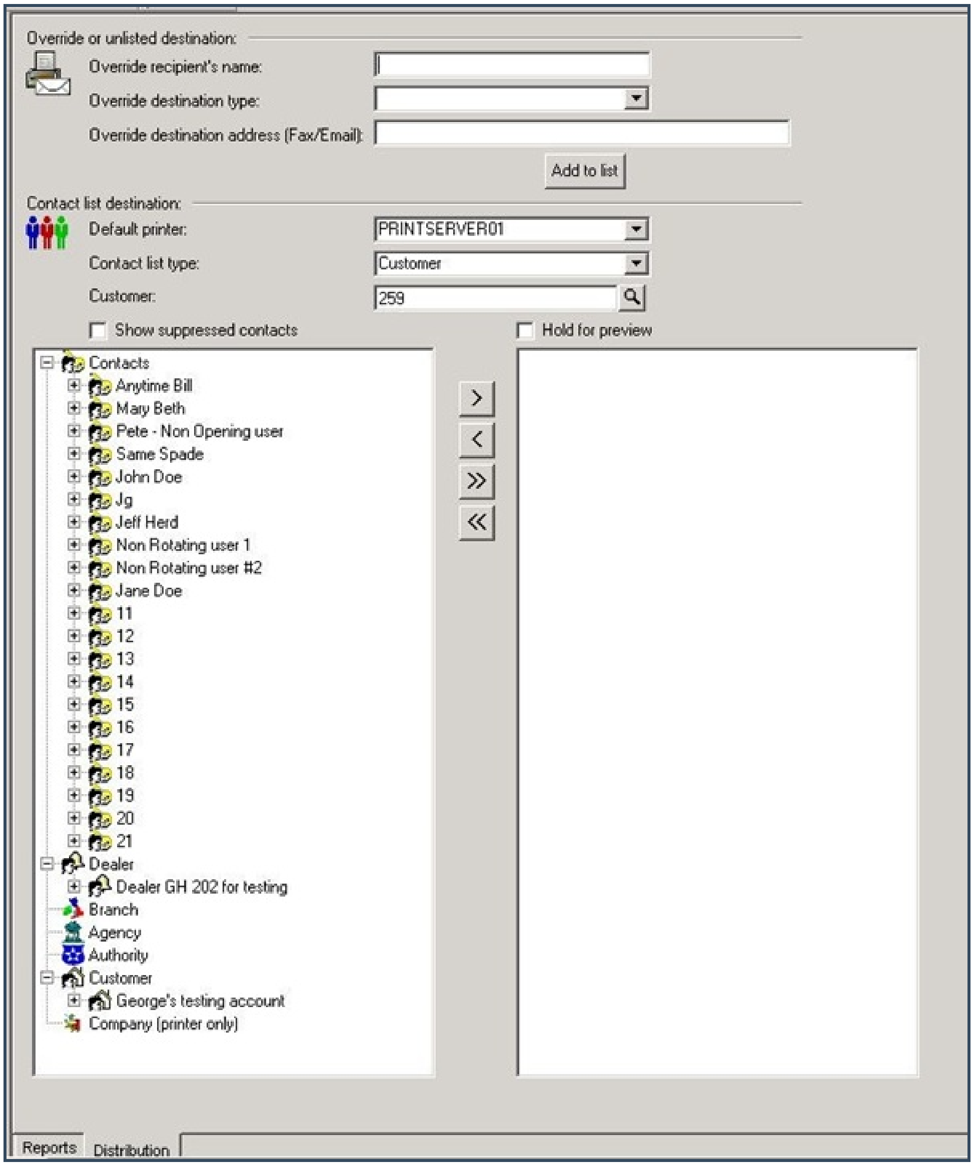
    Result: The "Customer Services Options" window displays as shown in the following screenshot:

12. Items in the "Monitoring status" area of the window display as preselected. If you want, deselect the items you want to exclude from your Report.
13. Click "OK".

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

14. Click "Next".

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



15. 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.