# SWS - Forms in the Report Menu - System Reports - System Reports - Customer Status

Last Modified on 08/05/2024 2:58 pm EDT

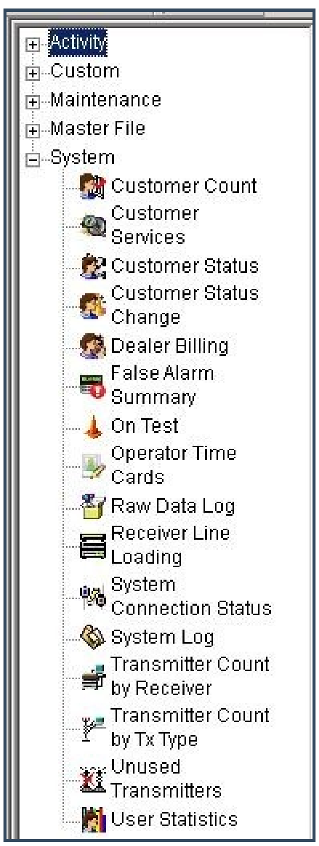
Perform the following steps to generate a Customer Status Report:

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

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

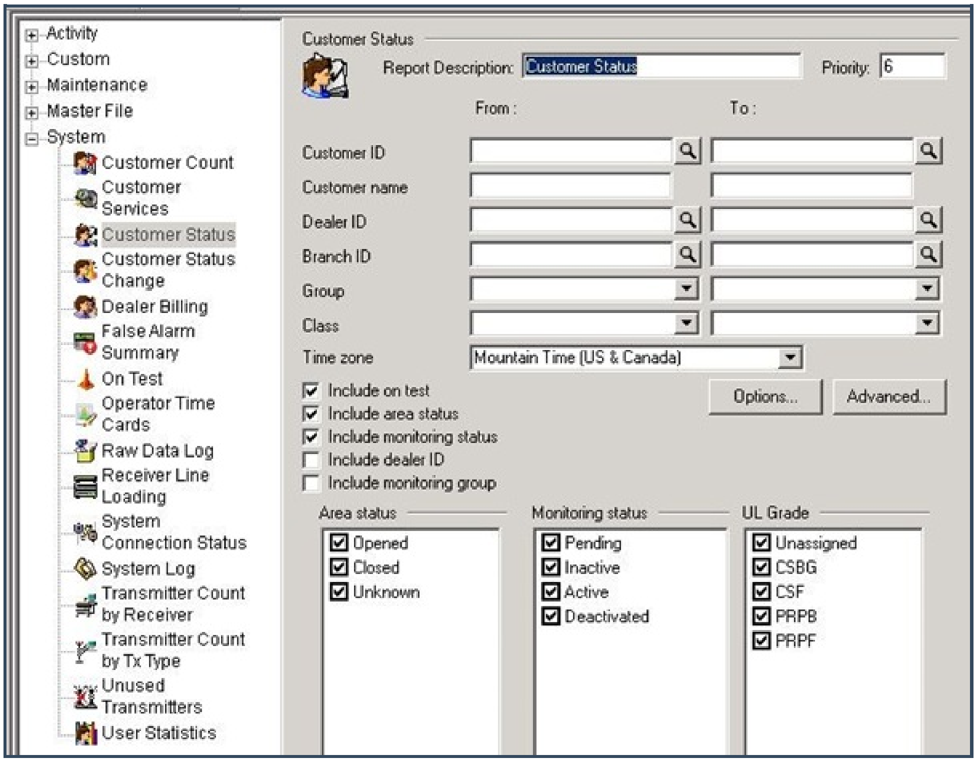

2. Click the "System File" Navigation Tree Node.

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




3. Double-click "Customer Status".

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




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

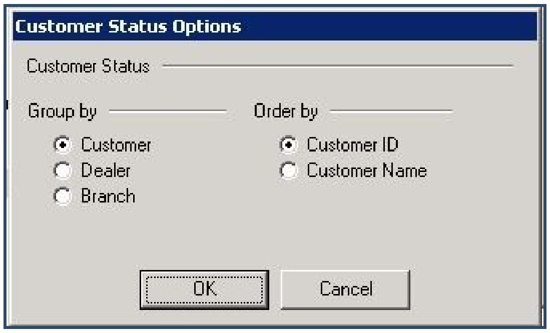
- Customer ID
- Customer Name
- Dealer ID
- Branch ID
- Group
- Class
- Time Zone

5. To run a Customer Status 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. The "Include on test" option displays as preselected. If you want to exclude Customer accounts that are On Test, deselect the checkbox.
7. The "Include area status" option displays as preselected. If you want to exclude the status of specific areas from your Report, deselect the checkbox.
8. The "Include monitoring status" option displays as preselected. If you want to exclude monitoring statuses from your Report, deselect the checkbox.
9. If you want your Report to display Dealer IDs, select the "Include dealer ID" checkbox.
10. If you want your Report to include Monitoring Groups, select the "Include monitoring group" checkbox.
11. Items in the "Area status" portion of the form display as preselected. If you want, deselect the items you want to exclude from your Report.
12. 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.
13. Items in the "UL Grade" area of the form display as preselected. If you want, deselect the items you want to

exclude from your Report.

14. Click "Options".

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

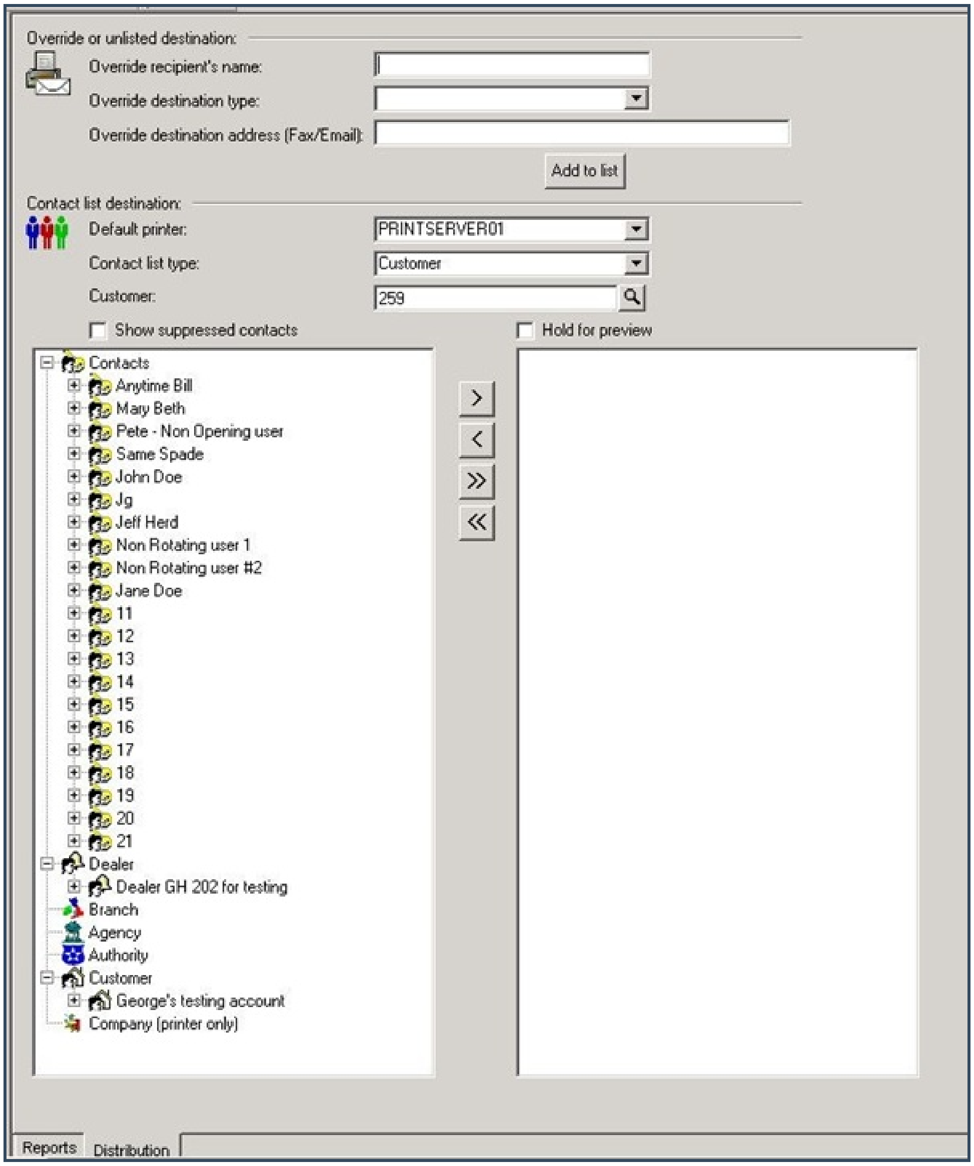
    
    

15. The "Customer" option in the"Group by" area of the window displays as preselected. If you want, select the "Dealer" or "Branch" option instead.
16. The "Customer ID" option in the "Order by" area of the window displays as preselected. If you want, select the "Customer Name" option instead.
17. Click "OK".

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

18. Click "Next".

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




19. 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.