

Customer List Report

Last Modified on 05/22/2018 12:42 pm CDT

Customer List

Purpose:

This report allows users to view all customers at once, or, to break out a list of customers by branch, status, or interest code. One way this report is often utilized, is to view prospect and target accounts so that sales teams know which accounts require follow up.


Branch: Customer Status:

Group By: Sort By:

Interest Code:

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Customer List

System System Level (Hierid 1) 

Customers with status like P, grouped by branchname, sorted by customername, from the following selected branches: 'Memphis SW'.

ID	Customer	Department	Office Phone	Status	Attn To	Activation Date	Account Manager	City	State
Memphis SW									
4295012451	ABC Accounting	Primary		P		4/19/2017	zachary.johnson		MN
4294999769	Balloons Inc.	Human Resources		P	Mary Beth Jones	5/2/2014	stephanie	Minneapolis	MN
4295012699	Beta Copies	Primary		P		8/21/2017	alexander.swanson	Eagan	MN
4295012843	Bon Jovi Entertainment	Primary		P		8/30/2017	hosteval28		MN
4294979521	Chamberlin	Primary		P		8/2/2013	toms		MN
4294989547	City of Minneapolis	Primary		P		8/22/2013	vern	Minneapolis	MN
4294999576	CONTROL	Primary		P		9/16/2013	vern		MN
4295012706	Dewey Plastics	Primary		P		8/21/2017	hosteval11		MN
4295012713	dewy plastic	Primary		P		8/21/2017	hosteval32	Saint Paul	MN
4295012714	DoeY Platics	Primary		P		8/21/2017	hosteval27		MN
4295010480	EMJ Industries	Primary		P		4/21/2015	ejames	Apple Valley	MN
4295012671	Galvin Roadwork	Primary		P		7/19/2017	alexander.swanson	LAKE ELMO	MN

Parameters:

1. Branch: A drop down list of all branches in the user's current hierarchy. Is a multi-value parameter so they can select all branches, just one specific branch or any combination of different branches in the list.
2. Customer Status: Allows you to filter on one, all or any combination of customer status in the system.
3. Group By: A list of different fields to group the data into on the report. Has the following options:
 - a. Branch on the customer

- b. Customer Name on the customer
- c. Status on the customer

4. Sort By: A list of different fields to sort the data within the specified group. Has the following options:

- a. Customer Name on the customer
- b. State on the customer

5. Interest Code: Filters for customers that have an interest code starting with the text entered here.

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