

Customer Message Report

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Customer Messages

Purpose:

This report allows you to audit the messages logged on your customer records. It is designed to enable you to view different types of activity going on with a customer as well as audit your reps productivity at certain customers. This can allow the user to essentially run a report for any criteria that service reps consistently log as messages with the corresponding message action. I.E. cold call attempts, interviews scheduled, LMTC, etc...

The screenshot displays the 'Customer Messages' report interface. At the top, there are filter fields for Start Date (7/1/2017), End Date (9/7/2017), Branch (Memphis SW), Group By (Date), Customer Id, and Action (1st Interview w/ client, 1st R). A 'View Report' button is located on the right. Below the filters is a navigation bar with page controls (1 of 4) and search options (Find | Next). The main content area is titled 'Customer Messages' and includes a sub-header 'System' and a note: 'Messages logged from 7/1/2017 to 9/7/2017 grouped by Date for Customerid: , from the following selected branches: 'Memphis SW''. The Tempworks logo is visible in the top right. A table lists messages with columns: Date, Time, Customer Id, Customer Name, Rep, Action, and Customer Location. The table shows two messages: one on 8/4/2017 (Email) and one on 8/9/2017 (Absent (excused)). A summary row for 08/04/2017 shows '1 message'. The email content for the first message is visible, starting with 'Dear Linda,' and mentioning a list of employees assigned to the ticket.

Date	Time	Customer Id	Customer Name	Rep	Action	Customer Location
08/04/2017						
8/4/2017	10:19 AM	4294999684	Murphy Construction	ejames	Email	Richfield, MN
Labor Ticket Details						
Dear Linda,						
Attached to this email you will find the list of employees assigned to your ticket.						
08/04/2017 Totals 1 message						
08/09/2017						
8/9/2017	9:51 AM	4294999683	Murphy Construction	ejames	Cold Call Attempt	Richfield, MN
lvm						
8/9/2017	9:15 AM	4294999683	Murphy Construction	ejames	Absent (excused)	Richfield, MN
Subject:						
Recipients: ejames@tempworks.com;						
Jessica is out sick today.						

Parameters:

1. Start Date: Starting message logged date of your desired date range
2. End Date: Ending message logged date of your desired date range
3. 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.

4. Group By: A list of different fields to group the data into on the report. Has the following options:

- a. (no grouping)
- b. Branch
- c. Customer
- d. Date
- e. Rep
- f. Action

5. Customer Id: Filters on the customer Id for the customer that the contact is linked to.

6. Action: A drop down list of message actions. Is a multi-value parameter, therefore you can select all action codes, just one specific code or all action codes.

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