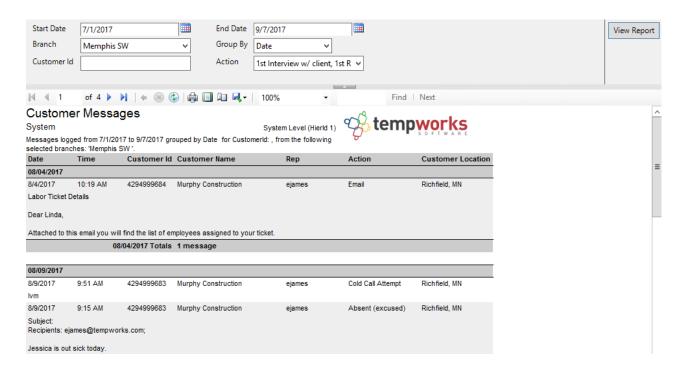
Customer Message Report

Last Modified on 05/22/2018 12:44 pm CDT

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...



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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