

Customer Contacts Report

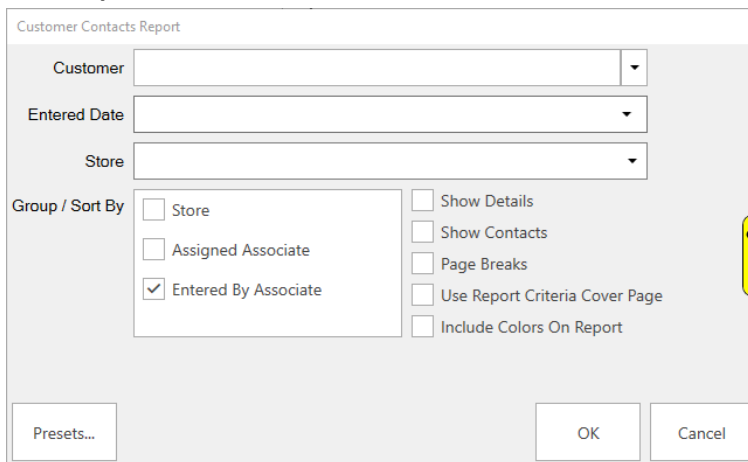
Overview

The **Customer Contacts** report provides a way to measure how much information your associates are collecting when they enter new customers. It will show you how many birthdays, anniversaries, addresses, phone numbers, and emails were added for new customers in a given period.

Working with the Report

To run the **Customer Contacts** report:

1. Click **Reports > Customers > Contacts**. The **Customer Contacts Report** filter will appear.



The screenshot shows the 'Customer Contacts Report' filter dialog box. It contains several input fields and checkboxes. The 'Customer' field is a dropdown menu. The 'Entered Date' field is a date range selector. The 'Store' field is a dropdown menu. The 'Group / Sort By' section has three checkboxes: 'Store', 'Assigned Associate', and 'Entered By Associate' (which is checked). The 'Show Details' section has five checkboxes: 'Show Details', 'Show Contacts', 'Page Breaks', 'Use Report Criteria Cover Page', and 'Include Colors On Report'. At the bottom, there are 'Presets...', 'OK', and 'Cancel' buttons.

2. Options on this report include:

Customer	Opens the Customer filter allowing you to enter additional criteria to narrow down your results.
Entered Date	Returns only customers entered in this date range.
Store	Returns only customers entered at this store.
Group/Sort By	Groups the results by store, assigned associate, and/or entered associate.
Show Details	Shows each individual customer. Leave unchecked for a summary only with total counts per associate.
Show Contacts	Shows all contact methods entered for each individual customer.
Page Breaks	Break to the next page for each grouping option.
Use Report Criteria Cover Page	Include the reports criteria page.

Include Colors on Report Include colors on this report.

3. Enter desired options and click **OK** to generate the report.

Summary Only

Leave **Show Details** and **Show Contacts** unchecked to get a summary only displaying totals for each associate.

Customer	Date Entered	Birthday	Anniversary	Addr. Count	Phone Count	Email Count
Assigned Assoc.: Jimmy Sales						
Assigned Assoc.: Jimmy SalesTotals	21	8	3	15	18	17
Assigned Assoc.: Ricky Repair						
Assigned Assoc.: Ricky RepairTotals	16	8	4	17	14	15
Assigned Assoc.: Sally Manager						
Assigned Assoc.: Sally ManagerTotals	18	9	4	17	14	17
Grand Totals	55	25	11	49	46	49

Individual Contact Counts

Check **Show Details** but leave **Show Contacts** unchecked to get one row per customer with their associated counts.

Customer	Date Entered	Birthday	Anniversary	Addr. Count	Phone Count	Email Count
Assigned Assoc.: Jimmy Sales						
abbott, jesse (001-00016)	09/13/2022			0	1	1
customer, new (001-00011)	08/24/2022			1	0	1
customer, wife (001-00015)	09/12/2022	05/01/1979		0	1	1
Duffy, Thistle (001-00017)	09/13/2022	02/05/2001	05/25	1	1	1
Harris, Larry (001-00039)	09/21/2022	01/05/1995		1	1	1
Johnson, Randy (001-00031)	09/19/2022			1	1	1
Krochko, Ray (001-00034)	09/19/2022	01/08		1	2	1
Lewis, Cindy (001-00055)	10/13/2022	05/15/1955		1	0	0
MacDonald, Norm (001-00019)	09/13/2022	08/04/1968	01/24	1	1	1
madison, james (001-00022)	09/14/2022			0	1	1
Obrien, Katie (001-00006)	10/20/2020			0	0	0
Phelan, Aiden (001-00027)	09/16/2022			1	1	1
Ramis, Harold (001-00053)	10/13/2022	08/04/1950		1	0	0
Rotten, Johnny (001-00047)	09/27/2022			1	1	1
Ryan, Tim (001-00001)	10/20/2020			1	1	1
Seaver, Tom (001-00032)	09/19/2022			1	1	1
Tango, Whiskey (001-00044)	09/26/2022			0	1	0
Test, Phone (001-00049)	10/05/2022			1	1	0
Assigned Assoc.: Jimmy SalesTotals	21	8	3	15	18	17

Individual Contact Counts with Contact Details

Check both **Show Details** and **Show Contacts** to get total counts per customer along with all the contact details collected.

Customer	Date Entered	Birthday	Anniversary	Addr. Count	Phone Count	Email Count
Address			Phone		Email	
Assigned Assoc.: Jimmy Sales						
abbott, jesse (001-00016)	09/13/2022			0	1	1
			(203) 500-6000 (P)		jesse@ajsllc.com (P)	
customer, new (001-00011)	08/24/2022			1	0	1
15 Corporate Drive, Trumbull, CT 06611					new.customer@ajsllc.com (P)	
customer, wife (001-00015)	09/12/2022	05/01/1979		0	1	1
			(203) 400-6000 (P) (M)		test.email@email.com (P)	
Duffy, Thistle (001-00017)	09/13/2022	02/05/2001	05/25	1	1	1
13 state st, East Haven, CT 06512 (P)			(203) 566-8956 (P) (M)		tristen@ajsllc.com (P)	
Harris, Larry (001-00039)	09/21/2022	01/05/1995		1	1	1
93 North Rd, Newtown, CT 06470 (P)			(203) 630-4000 (P) (M)		larry@harris.com (P)	
Johnson, Randy (001-00031)	09/19/2022			1	1	1
14 Main St, Milford, CT 06460 (P)			(203) 203-3333 (P)		randyj@ajsllc.com (P)	
Krochko, Ray (001-00034)	09/19/2022	01/08		1	2	1
34 Main, Milford, CT 06460 (P)			(203) 333-4455 (203) 895-4584 (P) (M)		ray@ajsllc.com (P)	
Lewis, Cindy (001-00055)	10/13/2022	05/15/1955		1	0	0
45 Brainard Ave, Naugatuck, CT 06770 (P)						
MacDonald, Norm (001-00019)	09/13/2022	08/04/1968	01/24	1	1	1
3 Corporate Dr, Suite 300, Shelton, CT 06484 (P)			(203) 500-6544 (P) (M)		norm@norm.com (P)	