

Customer List

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The Customer List Report is designed to print a listing of Customers by Customer Status. The report may be generated for Active Recurring, Non-Recurring or Cancelled Customers.

Once the desired options have been selected on the report options form, click the OK button to display the report in Print Preview mode.

Report Selections

Customer Status - This option will default to the Active Recurring Customers. The User must select one of the three options.

- *Active Recurring Customers* - When this option is selected, data for Customers with active recurring lines will be included on the report. If this option is selected, the User must enter an As Of Date for the report.
- *Non-Recurring Customers* - When this option is selected, data for Customers that are active but have no active recurring lines will be included on the report.
- *Cancelled Customers* - When this option is selected, data for cancelled Customers will be included on the report.

Branches - The report default is to print data for all active Branches. If it is desired to print the data associated with one or multiple Branches, you may select the checkbox to the left of each branch desired.

- *Hide Inactive Branches* - If data is not to be listed for inactive Branches, select this option.

Customer Types - The report default is to print data for all Customer Types. If it is desired to print the data associated with one or multiple Customer Types, you may select the checkbox to the left of each Customer Type desired.

- *Hide Inactive Customer Types* - If data is not to be listed for inactive Customer Types, select this option.

Report Style - The default Report Style is Customer List. Other Report Styles available are Bill to List, Site List and System List.

- *Customer List* - If this report style is selected, the information displayed is: Customer Number, Customer Name, Branch, the count of sites for the Customer, the count of Bill To records for the Customer and the total monthly recurring revenue for all sites for the Customer.
- *Bill to List* - If this report style is selected, one row will print for each Bill To record for each Customer; the information displayed is: Customer Number, Customer Name, Branch, the Bill To Name, the Bill To Address and the total monthly recurring revenue for the Bill To for the Customer.
- *Site List* - If this report style is selected, one row will print for each Site record for each Customer; the information displayed is: Customer Number, Customer Name, Branch, Site Name, Site Address and the total monthly recurring revenue for the site.
- *System List* - If this report style is selected, one row will print for each System record for each Customer; the information displayed is: Customer Number, Customer Name, Branch, Site Name, Site Address, Alarm Account and the total monthly recurring revenue for the system.

Group By - The report default is to group by None. Other grouping options available are Branch and Customer Type.

Sort By - The report default is to sort by Customer Number. Other sorting option available is Customer Name.

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