

Web Link Help File: Customer Activity Reports

Abstract

> This help file will illustrate how generate the four different Customer Activity reports.

Procedure

1. Navigate to "Business Tools" on main menu. Click on "View Customer Activity" from the drop down menu. (fig. 1)



- 2. The Customer Activity Reports field offers four different reports that can be chosen from the drop down list: Repeat Customer Report, Top 100 Customer, Inactive Customers, and Web Activity.
- 3. Choose "Repeat Customer Report" from the drop down list to create a report that shows repeat customer activity. (fig. 2)



4. The next screen displays two search fields; the first field allows the user to search by customer number. The second field allows the user to search for all customers that have made a purchase or simply visited the site without making a purchase within the previous 7 days, current month, last 30 days, or last 3 months. (fig. 3)

Customer Activity			ng
Customer Activity Reports:	Repeat Customer Report 👻	•	
Customer Number			
Customer Who has	All +	In Last 7 Days 👻	
Search	All Purchased	In Last 7 Days	
	Visited	In Last 30 Days In Last 3 Months	

• In the example below the user has chosen to search for all customers that have visited the site in the last 30 days. The resulting table provides Customer number, Customer Name, Last Login Date, Last Purchase Date, and Total Purchase. This table can be printed or saved as an Excel file. (fig. 4)

Customer Ac	tivity			
Customer Activi	ty Reports: Repeat Custo	mer Report 👻		
Customer Number				
Customer Who ha	s	Visited 👻 In Last 30	Days 🔻	
Search				
Search				Export To Excel / Print
Search Customer#	Customer Name	Last Login Date	Last Purchase Date	Export To Excel / Print Total Purchase
	Customer Name WebLink	Last Login Date 4/7/2011	Last Purchase Date Apr 7 2011 10:38AM	
Customer#		_		Total Purchase
Customer# DEFAULT	WebLink	4/7/2011	Apr 7 2011 10:38AM	Total Purchase \$484.23

5. Choose "Top 100 Customer" from the drop down list to generate a report of the user's top customers ordered by gross sales volume. (fig. 5)

Customer Activity		fig.5
Customer Activity Reports:	Select Select Repeat Customer Report Top 100 Customer Inactive Customers	
	Web Activity	

6. The next screen displays date fields that can be used to specify date ranges. (fig. 6)



• In the following example, the user has specified a date range and has generated a listing of the top customers by sales volume. These customers are arranged in descending order by total sales for the dates selected. This report can be printed or saved as an Excel file. (fig. 7)

Custom	er Activity				fig 7
Customer	Activity Reports:		er 🔻		fig.7
	Website Ord	ler			
Date From	: 01/01/2011		To: 04/	01/2011	
	(mm/dd/yyyy)		(mm	/dd/yyyy)	
	Submit			Export To Excel / Print	
Account#	Customer Name	Total Invoices	Total Sales		
DEFAULT	WebLink	<u>30</u>	\$897.75		
Edit	Test Company	<u>8</u>	\$171.97		
<u>5644</u>	WebLink	1	\$38.00		

7. Clicking on any one of the accounts from this list opens a customer details pop up window. This window provides contact information for the selected customer. (fig. 8)

				~
General D	etails			
Company Name:	WebLink			
Customer#	: DEFAULT			
Contact:	Customer Admir	n		
Email:	support@webl	inkcorp.com		
Website:				
Contact De	etails			
Address:	23950 Craftsma	n Road		
City:	Calabasas	Zip Code:	91302	
State :	Alabama	Country:	UNITED STATES	
Phone:	000-000-0000	FAX:	000000000	
	Clo	ose Window		
				-

 Clicking on the number displayed in the "total invoices" column will open a pop up window that lists all of the invoices for that customer that were generated within the selected time frame. Each of these invoices can be viewed when clicking on its Gateway Conf. number. (fig. 9)

otal Invoice	S			ſ	
ateway Conf #	Line Items	Total Sales	Core Sales		
14	1	\$9.05	\$0.00		Ш
10	1	\$9.05	\$0.00		
1	1	\$99.92	\$0.00		
2	1	\$99.92	\$0.00		
3	2	\$13.36	\$0.00		I
4	1	\$20.94	\$0.00		
5	1	\$20.94	\$0.00		
6	1	\$0.87	\$0.00		
7	1	\$20.94	\$0.00		
9	2	\$0.00	\$0.00		
07	1	\$5.49	\$0.00		
08	1	\$57.35	\$0.00		
09	1	\$0.00	\$0.00		
11	1	\$0.00	\$0.00		
4 D		400.00	400.00	1	

9. Choose "Inactive Customers" to generate a list of customers that have not visited the website within a specified period of time. (fig. 10)



10. The resulting page provides a field where the user can enter a date from which to populate the inactive customer list. All customers who have failed to log into the site from the entered date up to the present time will be listed. (fig. 11)

Customer Activity	fig.11
Customer Activity Reports: Inactive Customers	
Date Inactive From:	
(mm/dd/yyyy)	
Submit	

• In the example shown below, the user has chosen an "inactive from" date and has generated a list of inactive customers. This list provides customer contact information as well as the last order and login dates. Clicking on an account number will open a up window that provides additional contact information for the selected customer (see step 7 above). (fig. 12)

	Activity Reports: Inactive ive From: 03/01/2011 (mm/dd/yyyy)	Customers •			
Submit		Phone Number	E-Mail	Expor Last Order Date	t To Excel / Print Last Login Date
KPWL	Test Next	400-880-0081	test@test.com	11/2/2009	12/9/2009
	Argenetices Test	And the second	and the second sec	11/3/2009	12/8/2009
DEFAULT	Contraction of the local data and the local data an	The second second	Contract And Add and Address of Local	11/3/2009	12/8/2009
DEFAULT		100 100 0000	material and and and	11/27/2009	12/7/2009
DEFAULT	netra juin	849957154	main the fact back store	11/27/2009	12/7/2009
DEFAULT DEFAULT		Artistici 14	natofantarijaal oon Ingelogfintaaliteknal oon	11/27/2009 11/17/2009	12/7/2009 12/5/2009
DEFAULT DEFAULT KPWL	netra jain	540005/114 560000000 120-08-7980	natrofantarijaal oon degeorgfontaalihetmal oon tij generittiligenet ope	11/27/2009 11/17/2009 11/25/2009	12/7/2009 12/5/2009 11/25/2009
DEFAULT DEFAULT KPWL Eagle	natus jain Gebeer Engle	54005/254 1000000000 120-084-7980 800-501-081	natorika karikasi san Inspirafistrasilatinai san ti generiti belaktirasi san dhenda belaktirase san	11/27/2009 11/17/2009 11/25/2009 11/13/2009	12/7/2009 12/5/2009 11/25/2009 11/20/2009
DEFAULT DEFAULT KPWL Eagle KPWL	Initia (pin Ontine Engle Variet Dalitate	5499057154 5699057154 20-69-7995 80-591-995 50-591-995	materika Aurika al aan dhugaing faataa il kan ki gamar 20 Agmad agaa almar da Besti Alama, aan aamar da Besti Alama, aan	11/27/2009 11/17/2009 11/25/2009 11/13/2009 11/13/2009 11/11/2009	12/7/2009 12/5/2009 11/25/2009 11/20/2009 11/1/20/2009 11/11/2009
DEFAULT DEFAULT KPWL Eagle KPWL KPWL	hetta (jain Ontine Engle Yamini Salihale Kasuan Sharma	8209057214 1000000000 120-68-780 00-10-100 100-10-100 10-68-780	materificational com through of test and indexed com types and the state state of the photo dealers and the state of the state of the state of the state of the test of test com	11/27/2009 11/17/2009 11/25/2009 11/13/2009 11/11/2009 9/11/2009	12/7/2009 12/5/2009 11/25/2009 11/20/2009 11/11/2009 9/11/2009

11. Choose "Web Activity" to generate a list of all users who are currently logged into the website. (fig. 13)



12. The resulting page displays all of the users currently active and logged into the site. This page is automatically refreshed every 30 seconds. Additional information includes: session start time, last activity time, customer number, and IP address. Each customer is assigned a color code so that the administrator can quickly determine their relative activity level. The far right column of this list also allows the administrator to selectively log customers out of the system. (fig. 14)

Customer Activity

Customer Activity Reports: --Select--• fig.14

Listed below are all sessions which are currently active. You may choose to logout a user by clicking "Logout" next to the user that you wish to logout.

This page will refresh every 30 seconds.

Username	Session Start Time	Last Activity Time	Customer Number	IP Address	
Admin	04/07/2011 03:05:36 PM	04/07/2011 06:19:02 PM		69.76.198.193	
Admin	04/07/2011 04:08:39 PM	04/07/2011 04:56:16 PM		69.238.51.227	Logout
Dealer	04/06/2011 09:32:16 AM	04/07/2011 12:14:24 PM	DEFAULT	::1	Logout
Dealer	04/07/2011 12:01:08 PM	04/07/2011 12:01:15 PM	DEFAULT	127.0.0.1	Logout
Admin	04/07/2011 11:29:51 AM	04/07/2011 11:53:12 AM		127.0.0.1	Logout
Dealer	04/07/2011 07:13:13 AM	04/07/2011 07:21:36 AM	DEFAULT	122.168.101.18	Logout
Dealer	04/07/2011 06:50:10 AM	04/07/2011 07:21:00 AM	DEFAULT	99.114.89.94	Logout

Color Legend: Current 0 to 10 Minutes Idle 11 to 20 Minutes Long Idle Over 20 Minutes