

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)

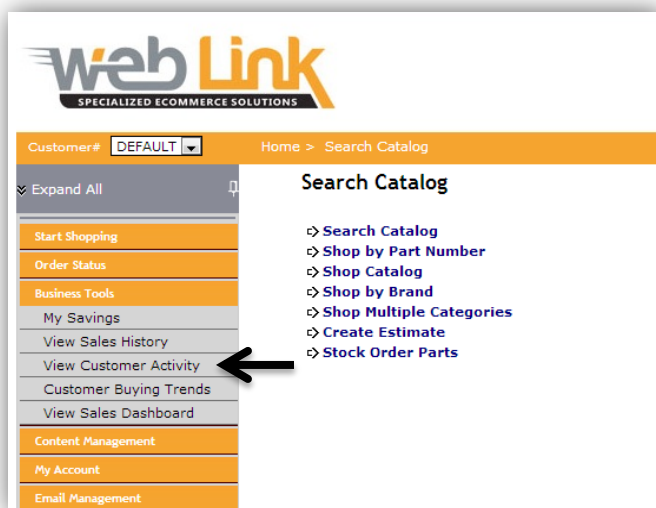


fig.1

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)

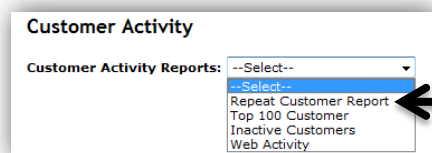
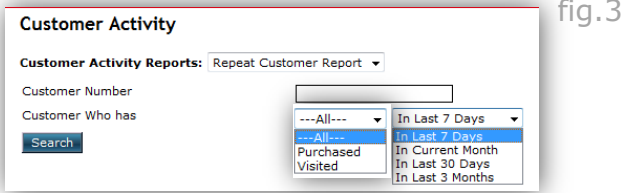
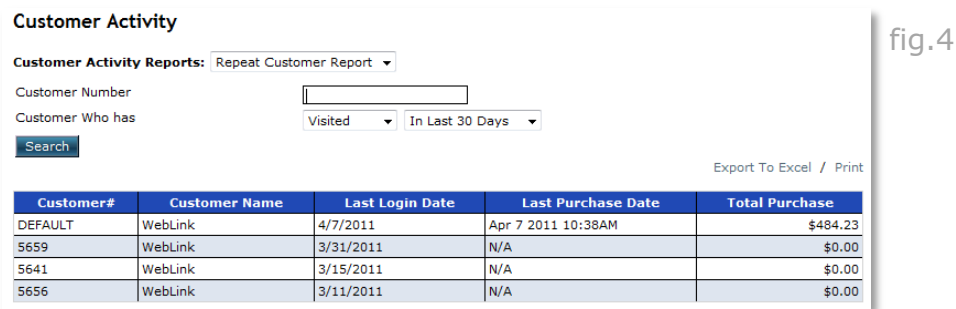


fig.2

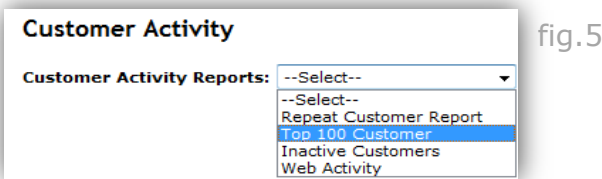
- The next screen displays two search fields; the first field allows the user to search by customer number. The second field allows the user to search for all customers that have made a purchase or simply visited the site without making a purchase within the previous 7 days, current month, last 30 days,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



- 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)



- 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)



- 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)

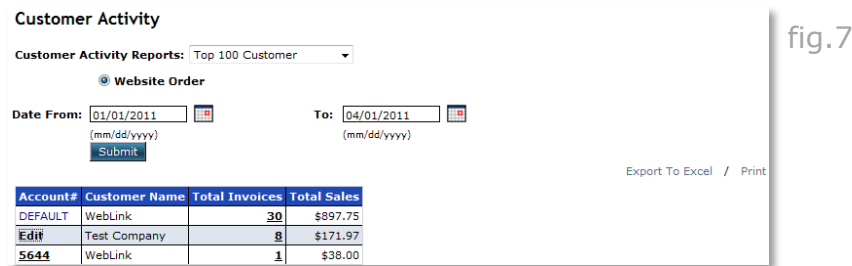


fig.7

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)

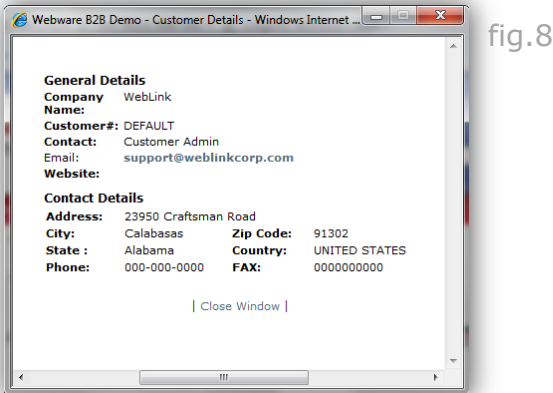


fig.8

8. 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)

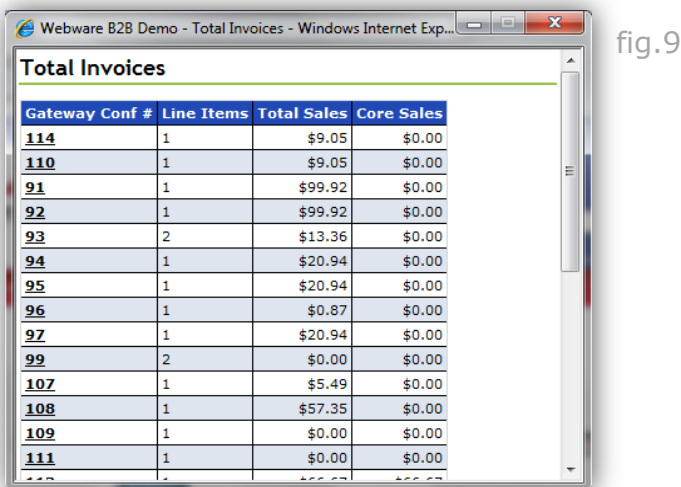


fig.9

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

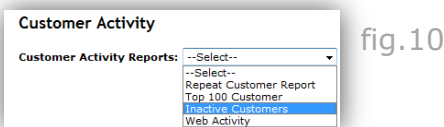


fig.10

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

Customer Activity Reports: Inactive Customers

Date Inactive From: (mm/dd/yyyy)

fig.11

- 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)

Customer Activity

Customer Activity Reports: Inactive Customers

Date Inactive From: 03/01/2011 (mm/dd/yyyy)

Export To Excel / Print

Account#	Customer Name	Phone Number	E-Mail	Last Order Date	Last Login Date
KPWL	test test	800-800-0000	test@test.com	11/2/2009	12/9/2009
DEFAULT	Repeating Test	800-800-0000	repeatingtest@fakesite.com	11/3/2009	12/8/2009
DEFAULT			moreofan@fakesite.com	11/27/2009	12/7/2009
DEFAULT		8000000000	thompson@fakesite.com	11/17/2009	12/5/2009
KPWL	John Jack	8000000000	jj.jack@fakesite.com	11/25/2009	11/25/2009
Eagle	Charles Eagle	100-888-7888	charles@fakesite.com	11/13/2009	11/20/2009
KPWL	James Johnson	800-800-0000	jamesjohnson@fakesite.com	11/11/2009	11/11/2009
KPWL	Robert Thomas	100-888-7888	rob@fakesite.com	9/11/2009	9/11/2009
KPWL	Robert Thomas	100-888-7888	rob@fakesite.com	9/11/2009	9/11/2009
KPWL	Robert Thomas	100-888-7888	rob@fakesite.com	9/10/2009	9/10/2009
default	John Jack	800-800-0000	johnjack@fakesite.com	9/3/2009	9/10/2009

fig.12

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

Customer Activity

Customer Activity Reports: --Select--

- Select--
- Repeat Customer Report
- Top 100 Customer
- Inactive Customers
- Web Activity

fig.13

- 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--

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

fig.14