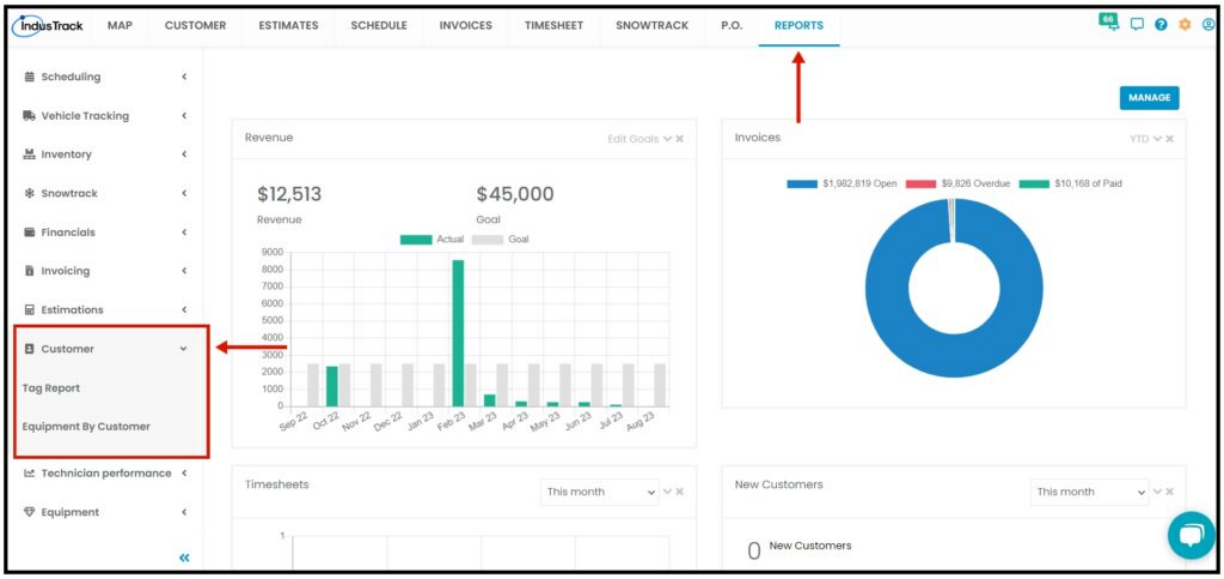
# Customer Report

To access Customer Report, click on the Reports Module from the top dashboard> on the left panel, and click **Customer**.

A drop-down option will show its subcategories for the reports you want to see:

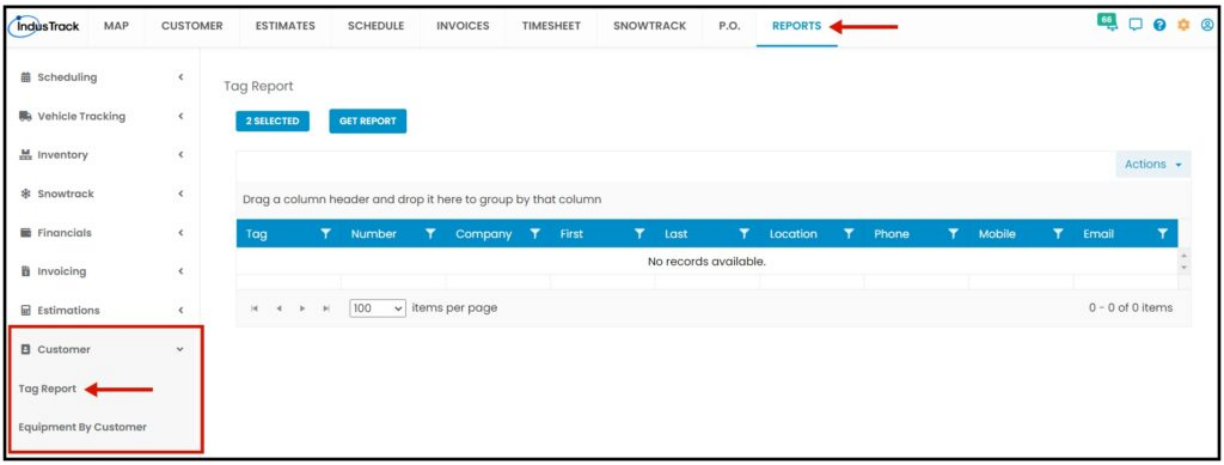
- Tag Report
- Equipment By Customer




## Tag Report

In this Report, you will be able to generate each Tag that was assigned to customers.

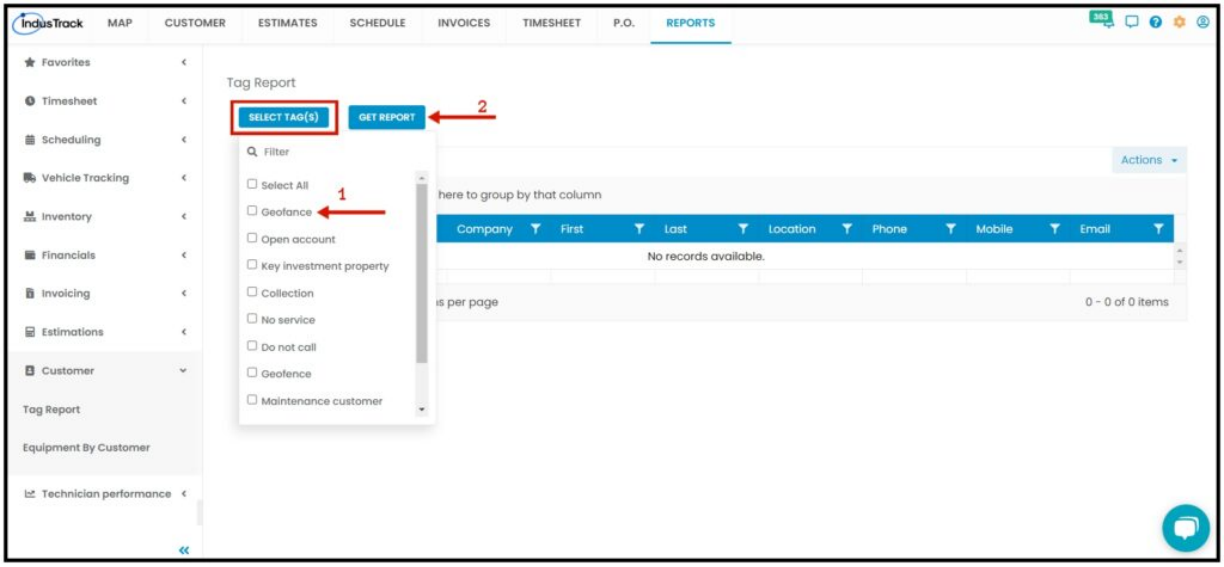
To view the Tag Report, go to **Reports** Menu on the top> Click **Customer**> on the drop-down click **Tag Report**.




### Generate Tag Report

You can filter the report by the following:

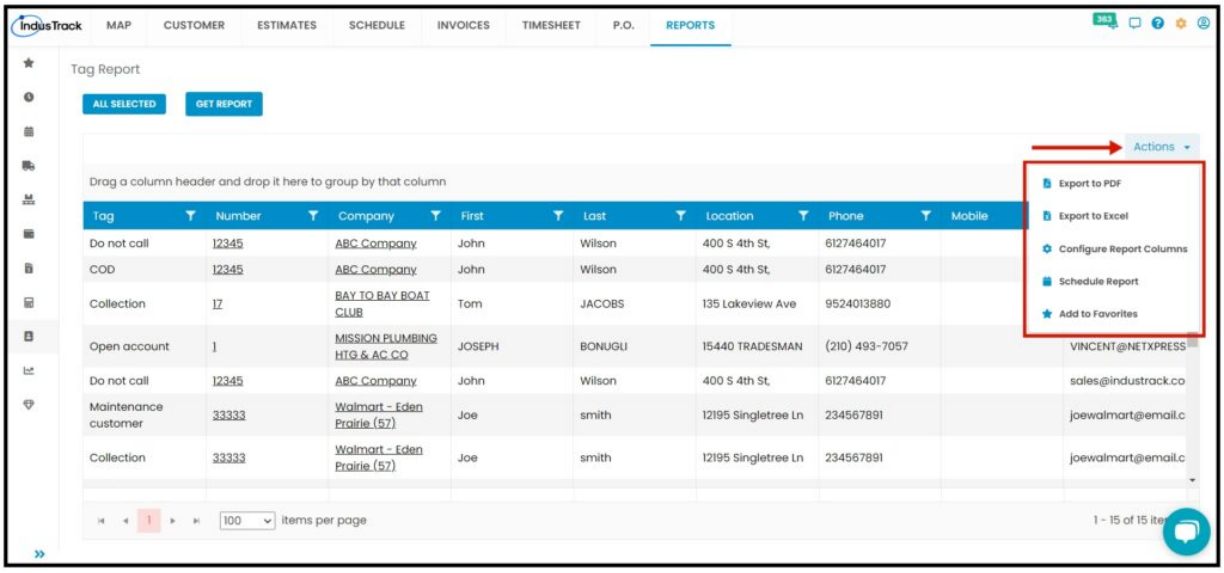
1. Tag/s –
    - Click on **Select Tag/s**
    - You have the option to either select one tag or multiple tags or all tags.
2. After you selected the tag/s, click on **Get Report.**




After we click on Get Report, we can now export the Tag Report into **Excel or PDF format** by clicking on the **Actions Button**.

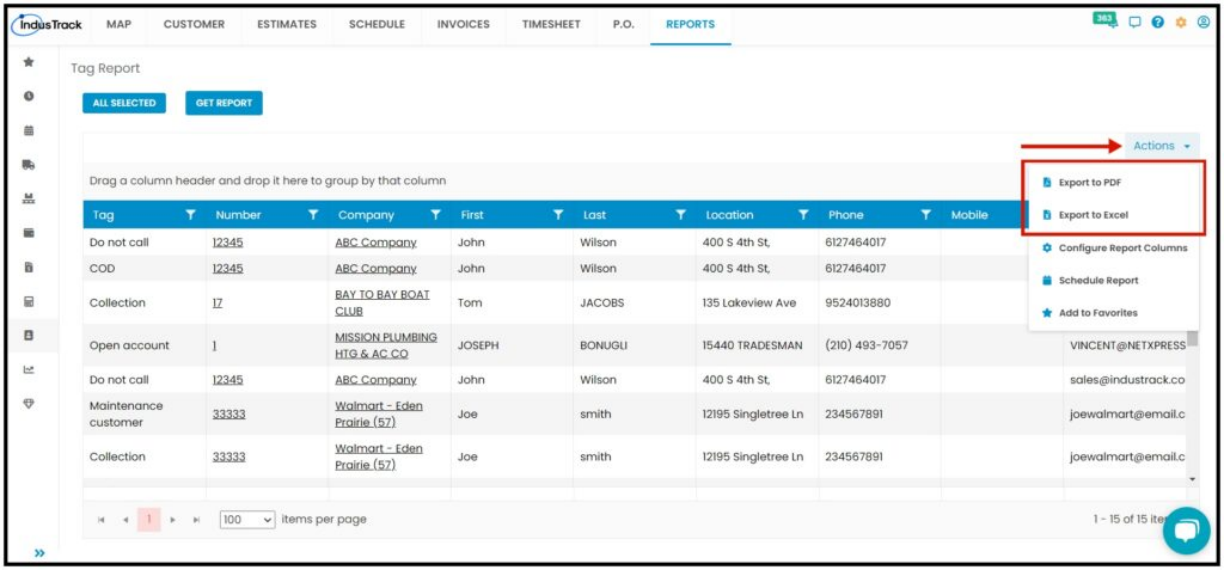
## Actions Button

- Export to PDF
- Export to Excel
- Configure Report Columns
- Schedule Report
- Add to Favorites



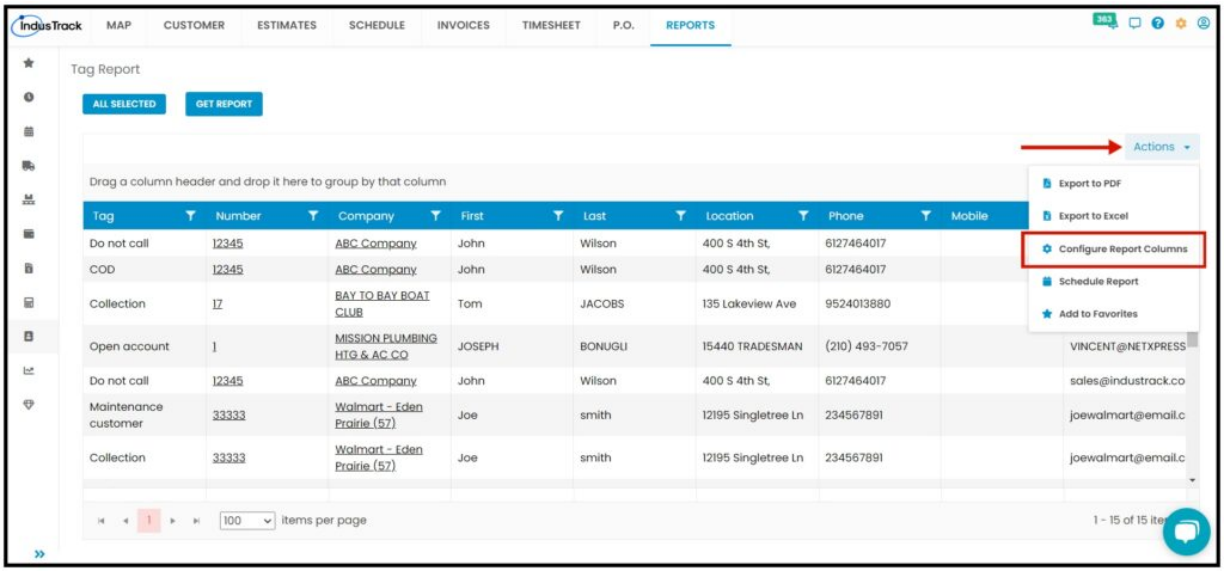

### Export Report

- Click on **export to Excel** or **export to PDF** to download the report to your computer. Either way, you can completely see the details in the report.

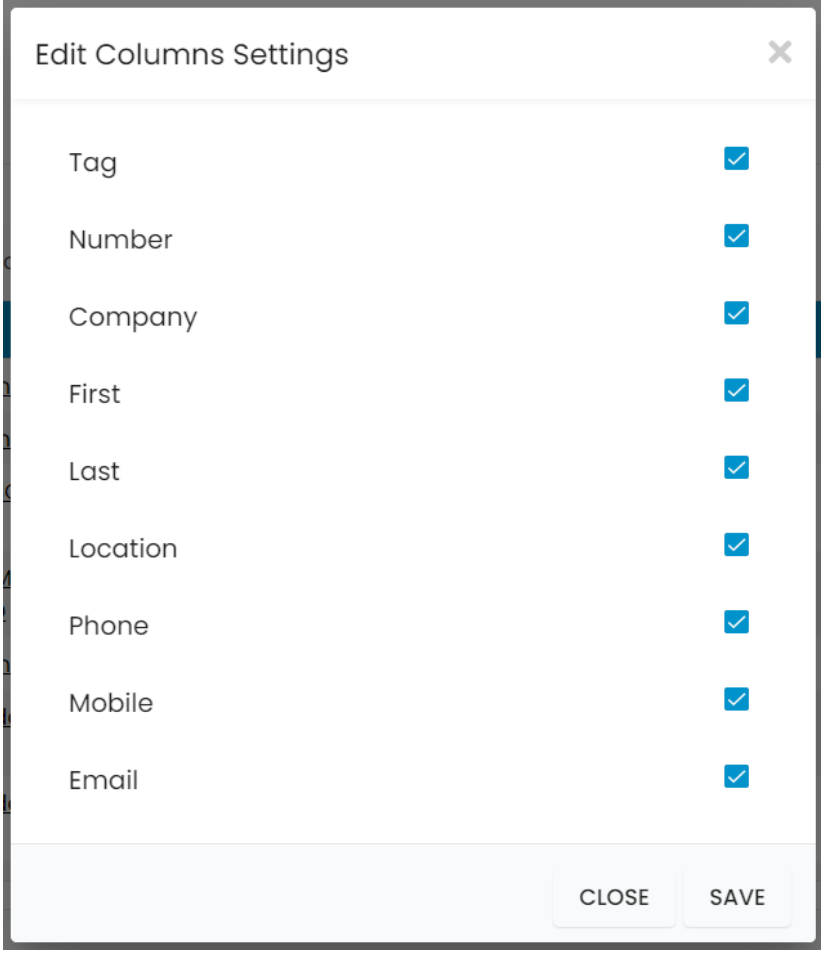



**Configure Report Columns**

Enable or disable the columns on this report if you want to see them or not. When disabling the column/s, once you generate this report that specific column will be removed.

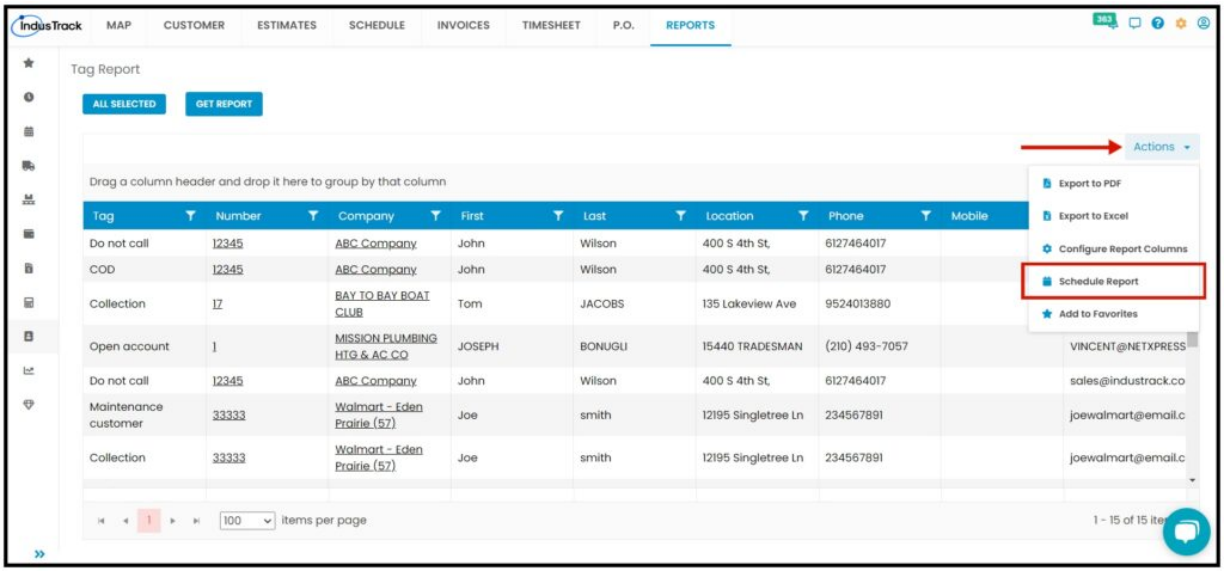



Uncheck columns you don’t want to see in the Report. Click SAVE after configuring.



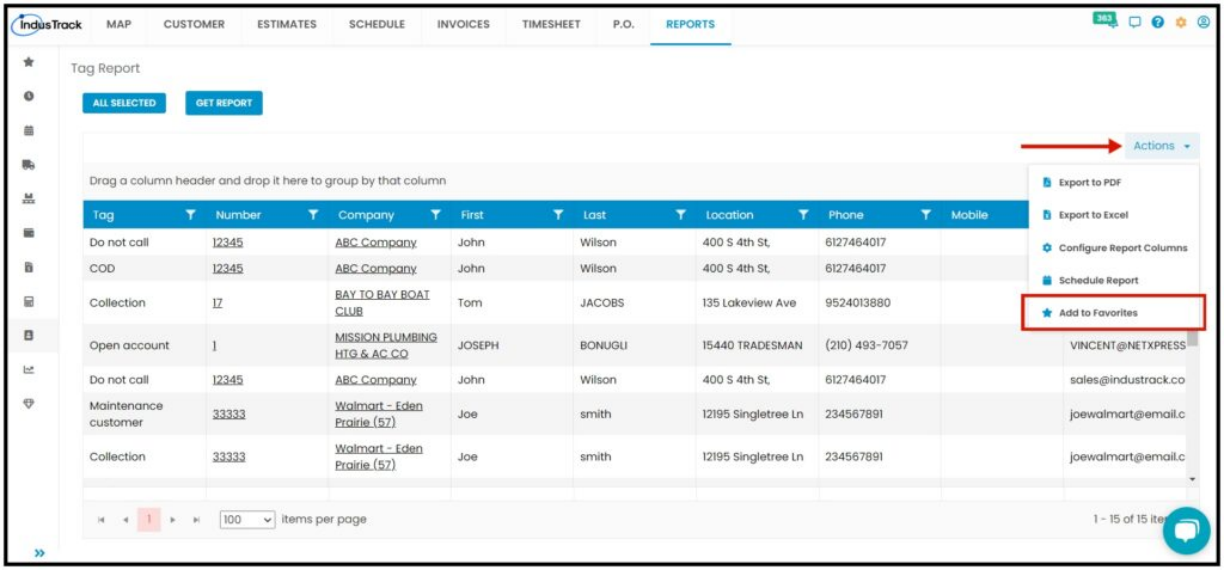

**Schedule Report**

You can also Automatically schedule a report on a specified frequency. Refer to Schedule Report Module.

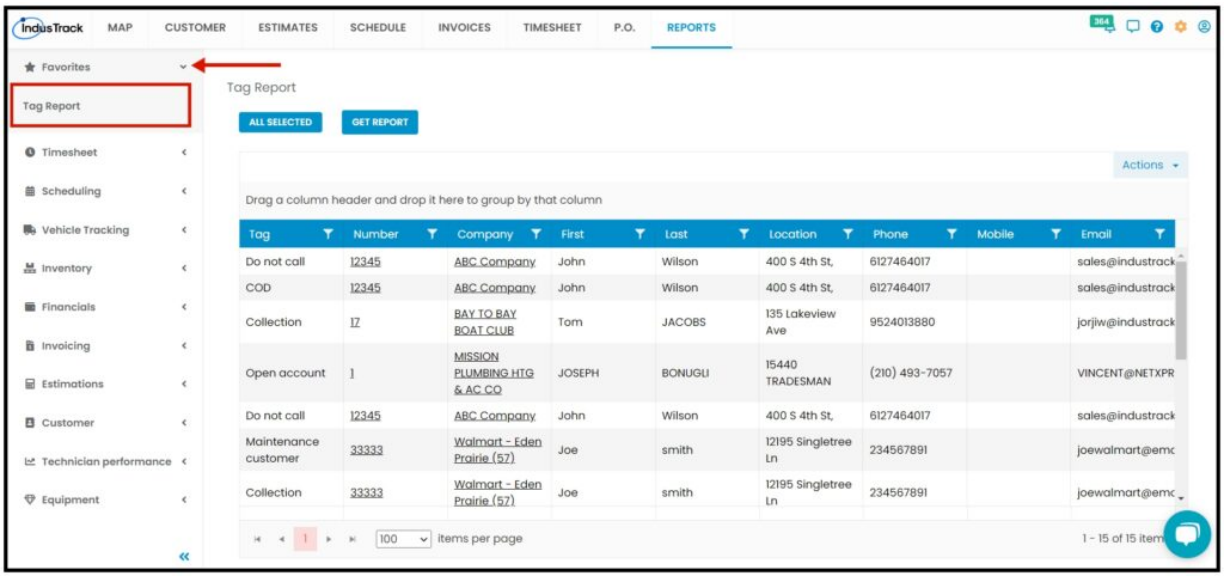



**Add to Favorites**

If you are frequently using this Report, you can select and Add it to your Favorites.




After you added a Report to **Favorites**, a **Favorite Tab** will be added at the top right of the left panel. All reports that are added to Favorite will be listed in the Top panel for easy access.

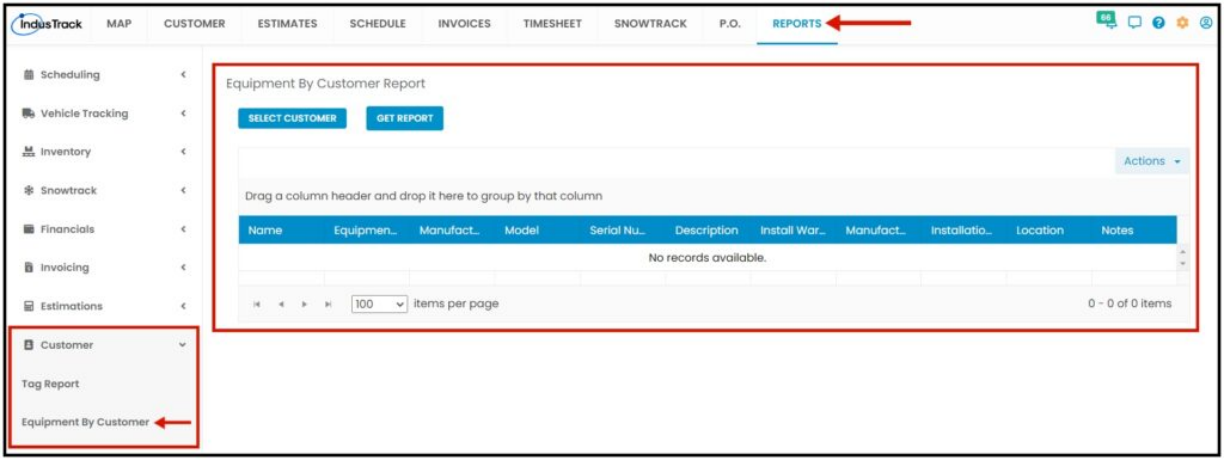



## Equipment By Customer Report

In this report, you will be able to generate each of the customer's existing equipment or customer-owned equipment and their details:

- Name
- Equipment Location
- Manufacturer
- Model
- Serial Number
- Description
- Installation Warranty Date
- Manufacturer Warranty Date
- Installation Date
- Notes

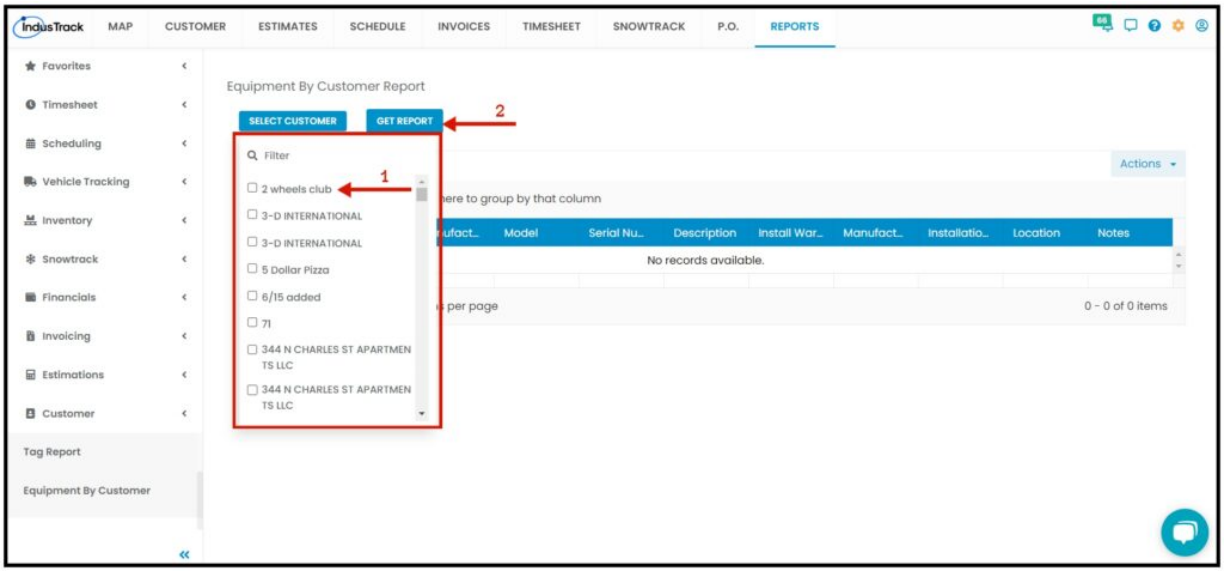
To view the Equipment By Customer Report, go to **Reports** Menu on the top> Click **Customer**> on the drop-down click **Equipment By Customer Report.**

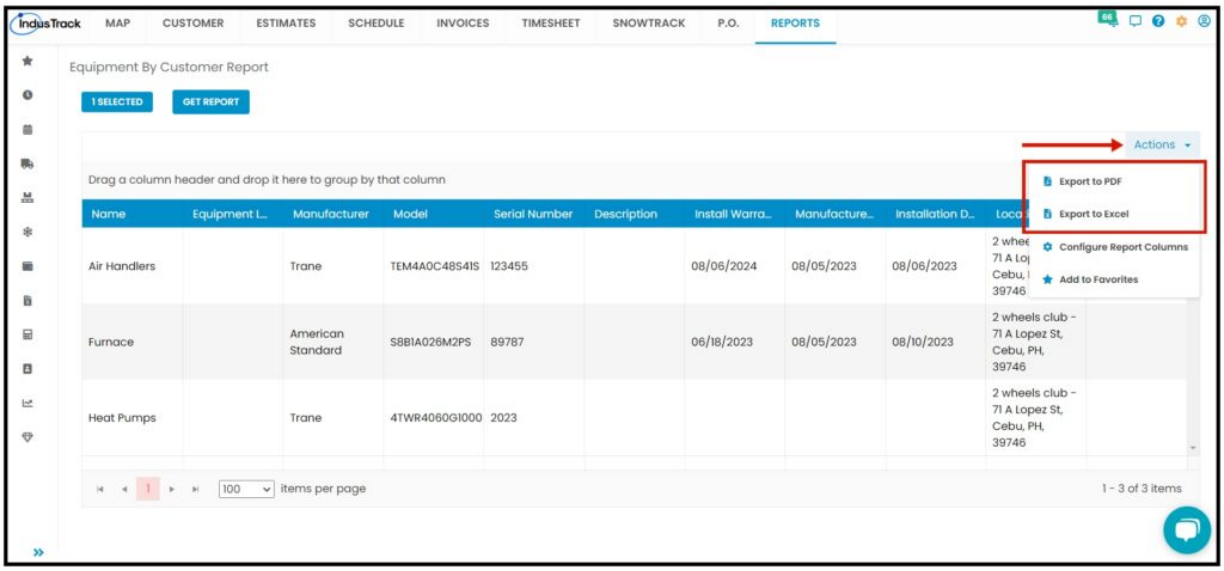



**Generate Equipment By Customer Report**

You can filter the report by the following:

1. Customer
    - Click on **Select Customer**
    - You can only select one customer at a time.
2. After you selected the customer, click on **Get Report.**




After we click on Get Report, we can now export the Equipment By Customer Report into **Excel or PDF format** by clicking on the **Actions Button** and selecting **Export to PDF or Export to Excel.**