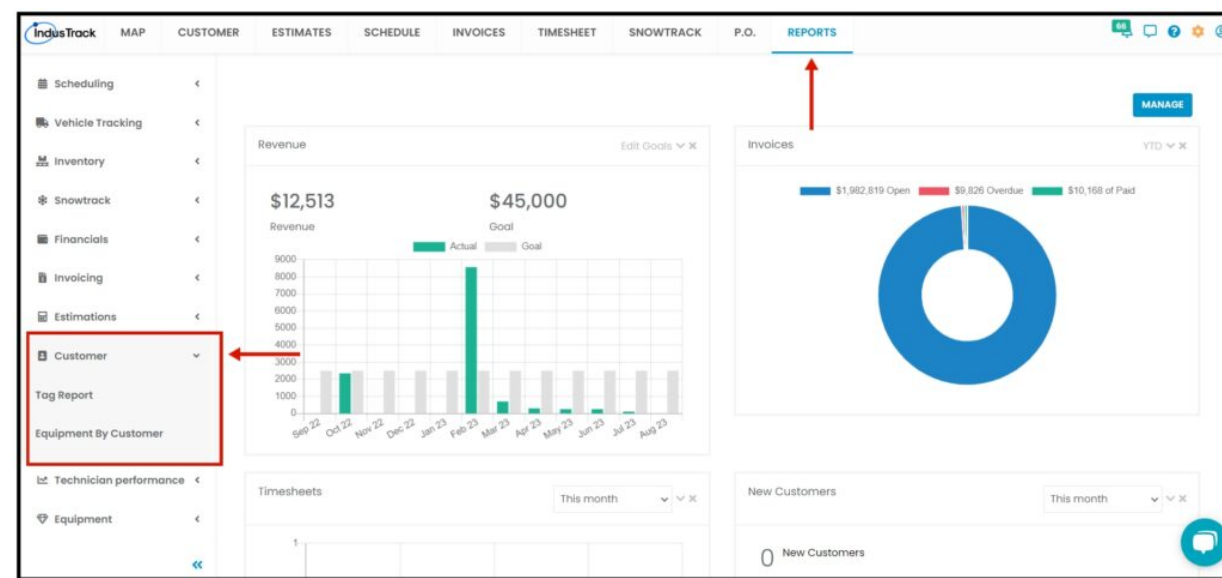


Customer Report

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:

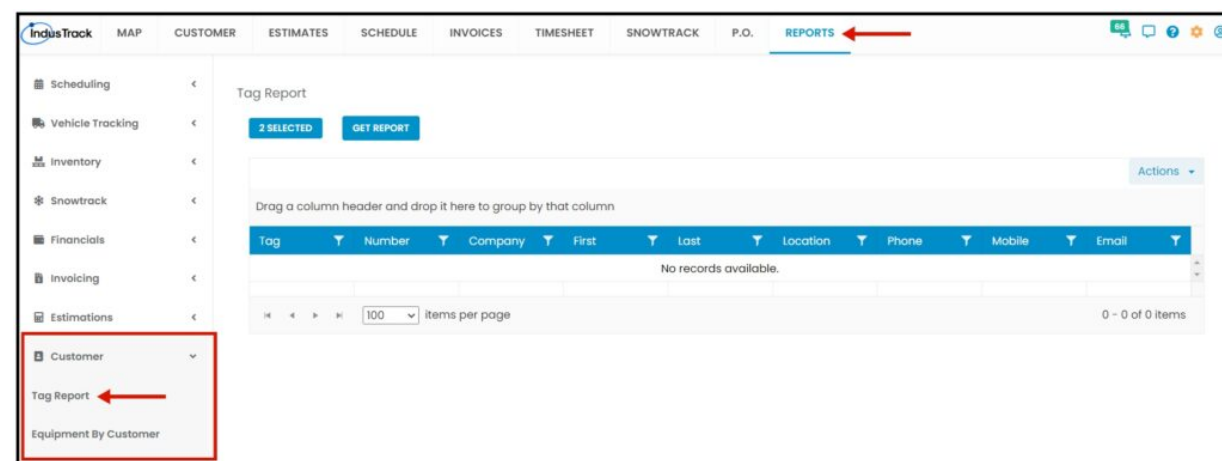
- Tag Report
- Equipment By Customer



Tag Report

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

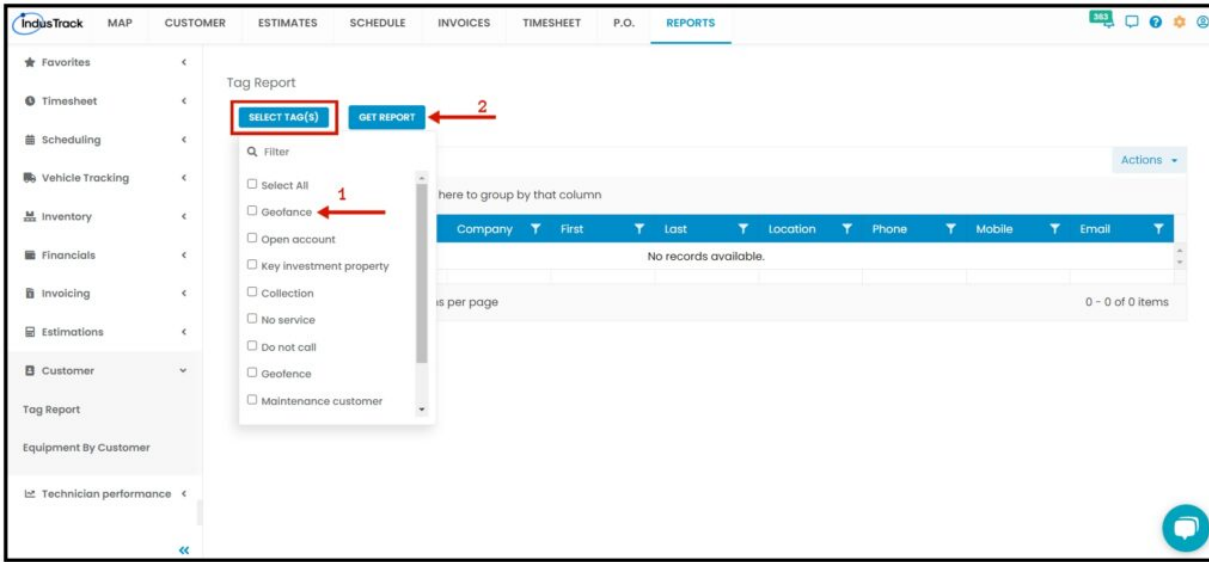
To view the Tag Report, go to **Reports** Menu on the top> Click **Customer**> on the drop-down click **Tag Report**.



Generate Tag Report

You can filter the report by the following:

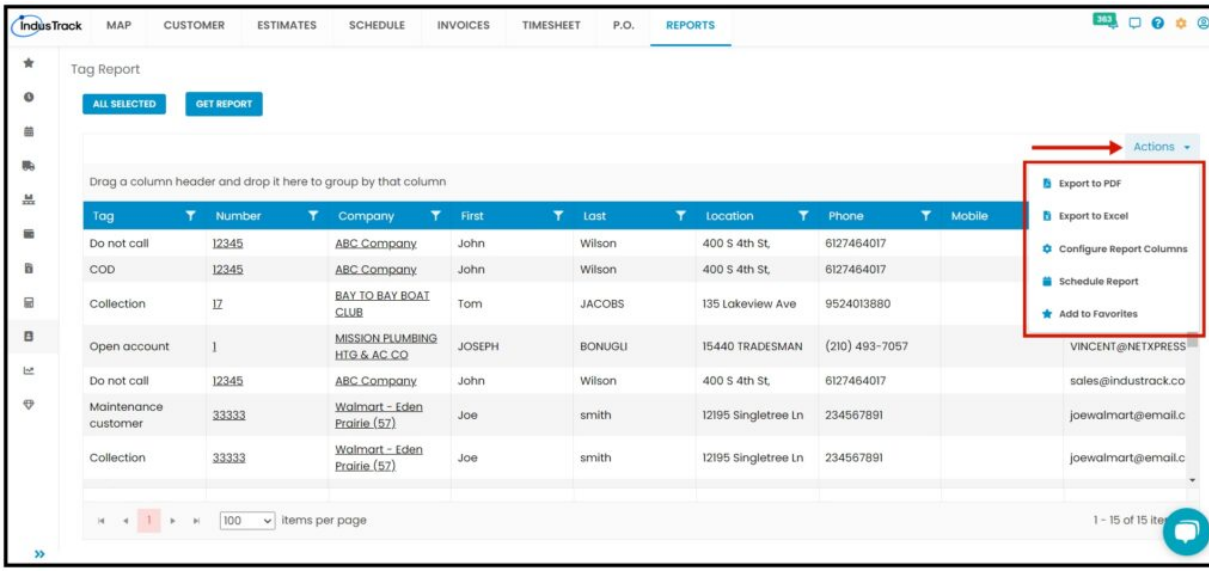
1. Tag/s –
 - Click on **Select Tag/s**
 - You have the option to either select one tag or multiple tags or all tags.
2. After you selected the tag/s, click on **Get Report**.



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.

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET P.O. **REPORTS**

Tag Report

ALL SELECTED GET REPORT

Drag a column header and drop it here to group by that column

Tag	Number	Company	First	Last	Location	Phone	Mobile
Do not call	12345	ABC Company	John	Wilson	400 S 4th ST	6127464017	
COD	12345	ABC Company	John	Wilson	400 S 4th ST	6127464017	
Collection	17	BAY TO BAY BOAT CLUB	Tom	JACOBS	135 Lakeview Ave	9524013880	
Open account	1	MISSION PLUMBING HTG & AC CO	JOSEPH	BONUGLI	15440 TRADESMAN	(210) 493-7057	VINCENT@NETXPRESS
Do not call	12345	ABC Company	John	Wilson	400 S 4th ST	6127464017	sales@industrack.co
Maintenance customer	33333	Walmart - Eden Prairie (57)	Joe	smith	12195 Singletree Ln	234567891	joewalmart@email.c
Collection	33333	Walmart - Eden Prairie (57)	Joe	smith	12195 Singletree Ln	234567891	joewalmart@email.c

1 - 15 of 15 items

Actions

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

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.

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET P.O. **REPORTS**

Tag Report

ALL SELECTED GET REPORT

Drag a column header and drop it here to group by that column

Tag	Number	Company	First	Last	Location	Phone	Mobile
Do not call	12345	ABC Company	John	Wilson	400 S 4th ST	6127464017	
COD	12345	ABC Company	John	Wilson	400 S 4th ST	6127464017	
Collection	17	BAY TO BAY BOAT CLUB	Tom	JACOBS	135 Lakeview Ave	9524013880	
Open account	1	MISSION PLUMBING HTG & AC CO	JOSEPH	BONUGLI	15440 TRADESMAN	(210) 493-7057	VINCENT@NETXPRESS
Do not call	12345	ABC Company	John	Wilson	400 S 4th ST	6127464017	sales@industrack.co
Maintenance customer	33333	Walmart - Eden Prairie (57)	Joe	smith	12195 Singletree Ln	234567891	joewalmart@email.c
Collection	33333	Walmart - Eden Prairie (57)	Joe	smith	12195 Singletree Ln	234567891	joewalmart@email.c

1 - 15 of 15 items

Actions

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

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

Edit Columns Settings



- Tag
- Number
- Company
- First
- Last
- Location
- Phone
- Mobile
- Email

CLOSE

SAVE

Schedule Report

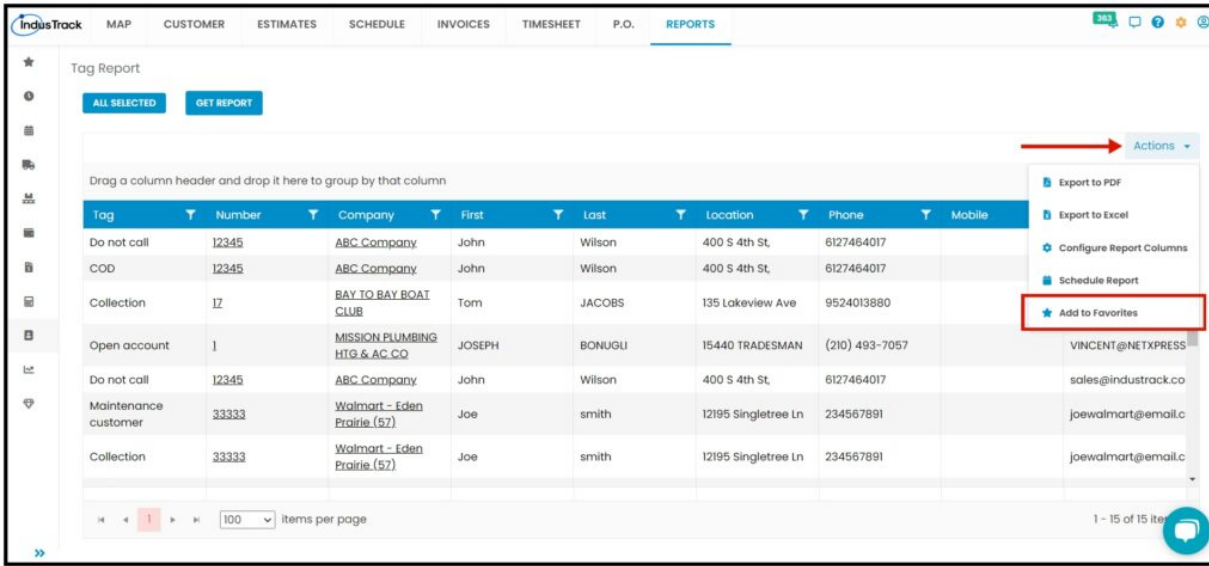
You can also Automatically schedule a report on a specified frequency. Refer to Schedule Report Module.

The screenshot shows the IndusTrack Reports module. The main content is a 'Tag Report' table with columns: Tag, Number, Company, First, Last, Location, Phone, Mobile, and an email column. The table contains several rows of data. An 'Actions' dropdown menu is open on the right side of the table, with the 'Schedule Report' option highlighted by a red box. Other options in the menu include 'Export to PDF', 'Export to Excel', 'Configure Report Columns', and 'Add to Favorites'. The table also has a pagination bar at the bottom showing '1' of 15 items and '100 items per page'.

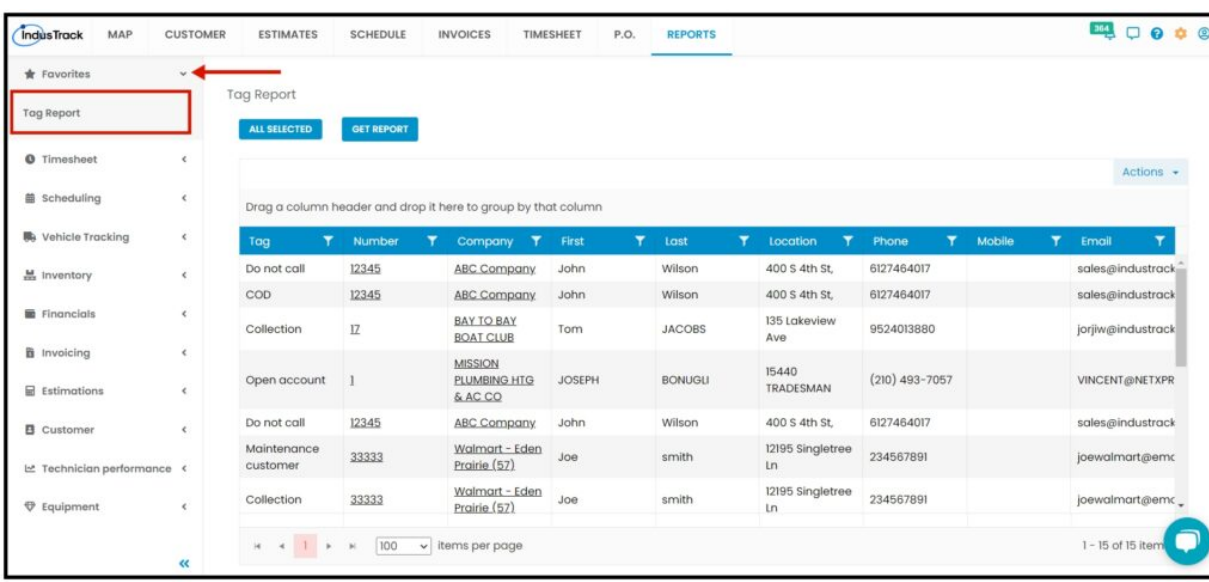
Tag	Number	Company	First	Last	Location	Phone	Mobile	
Do not call	12345	ABC Company	John	Wilson	400 S 4th St	6127464017		
COD	12345	ABC Company	John	Wilson	400 S 4th St	6127464017		
Collection	17	BAY TO BAY BOAT CLUB	Tom	JACOBS	135 Lakeview Ave	9524013880		
Open account	1	MISSION PLUMBING HTG & AC CO	JOSEPH	BONUGU	15440 TRADESMAN	(210) 493-7057		VINCENT@NETXPRESS
Do not call	12345	ABC Company	John	Wilson	400 S 4th St	6127464017		sales@industrack.co
Maintenance customer	33333	Walmart - Eden Prairie (57)	Joe	smith	12195 Singletree Ln	234567891		joewalmart@email.c
Collection	33333	Walmart - Eden Prairie (57)	Joe	smith	12195 Singletree Ln	234567891		joewalmart@email.c

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.

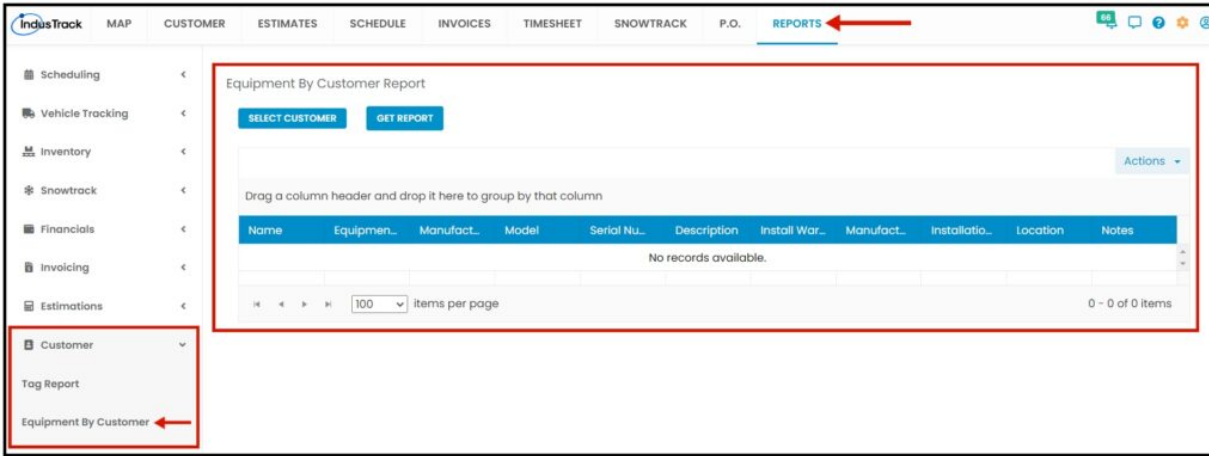


Equipment By Customer Report

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

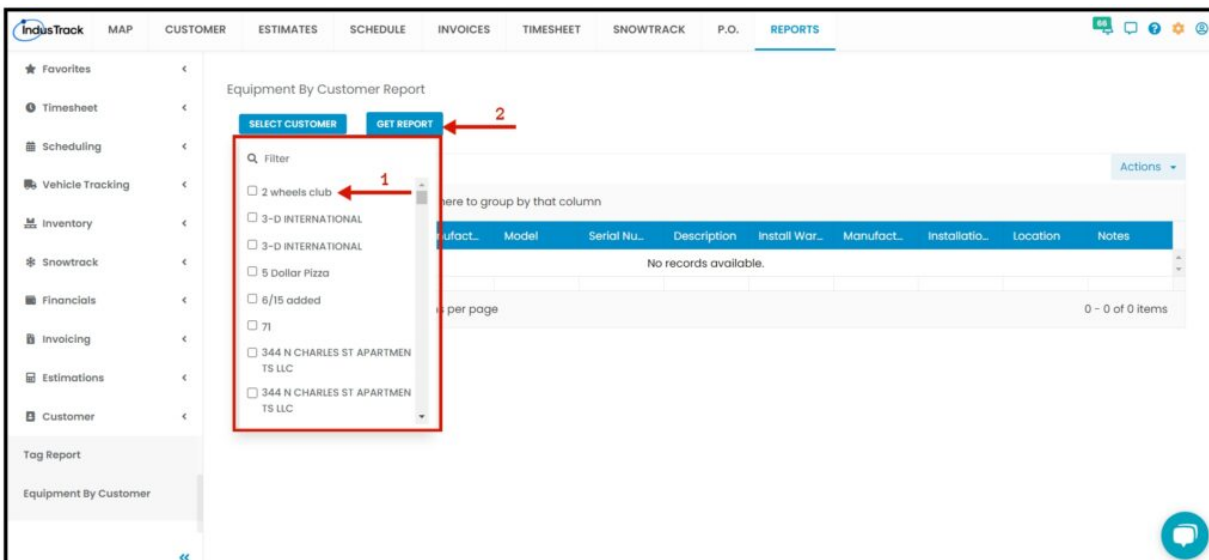
To view the Equipment By Customer Report, go to **Reports** Menu on the top> Click **Customer**> on the drop-down click **Equipment By Customer Report**.



Generate Equipment By Customer Report

You can filter the report by the following:

1. Customer
 - o Click on **Select Customer**
 - o 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**.

