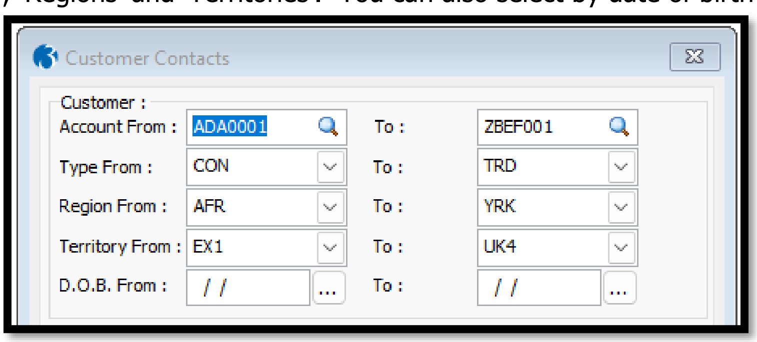
Customer contacts report

Use this report to produce a list of customer contacts or create emails with attachments to send to one or a selection of contacts. Customer contact records are maintained on the Sales - Processing - Contacts form.

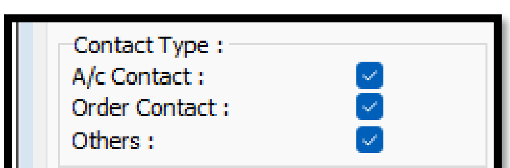
To Print Contact Details or Email Contacts

1. Open the Sales Ledger folder and then click Reports - Customer Contacts or click the Financials tab and then click Sales Ledger - Reports - Customer Contacts on the Ribbon Bar.

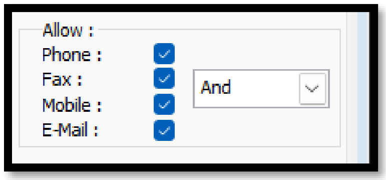
2. Using the list boxes provided, you can select which record to include on the basis of one or a range of 'Accounts', 'Types', 'Regions' and 'Territories'. You can also select by date of birth range.



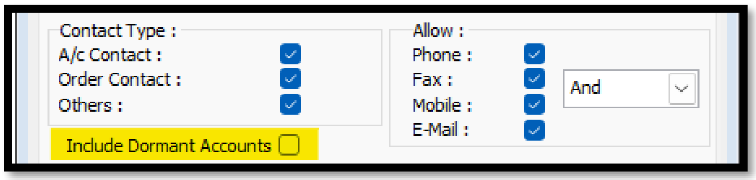
3. Under Contact Type, click to select whether you want to include account, order or other contacts in the range of selected records.



4. Under Allow, select the contact details you want to use as selection criteria. Use the list box alongside to determine whether the selections are inclusive by selecting And or Or.

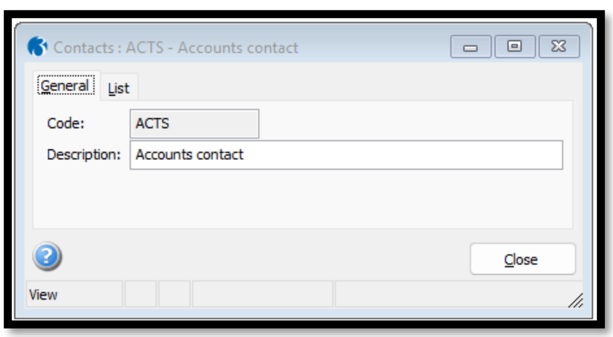


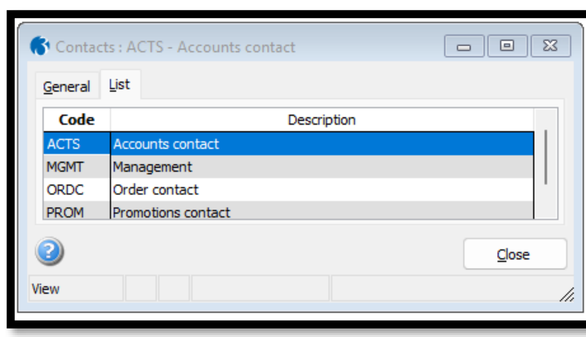
5. If you want to include 'dormant' customers, select the Include Dormant Accounts option.

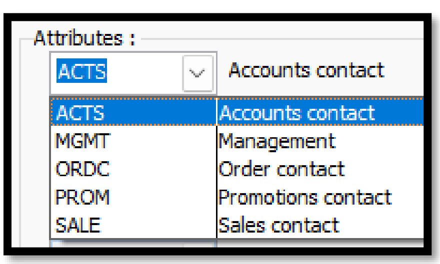


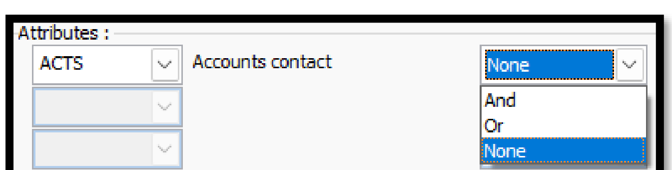
6. Under Attributes, you can select specific attributes to narrow the list of selected contacts further. These attributes are created on the Sales - Maintenance - Contacts form and are allocated to your contacts on the Sales - Processing - Contacts form.

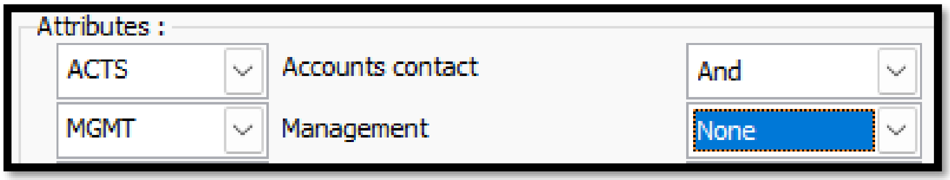
Sales - Maintenance - Contacts form







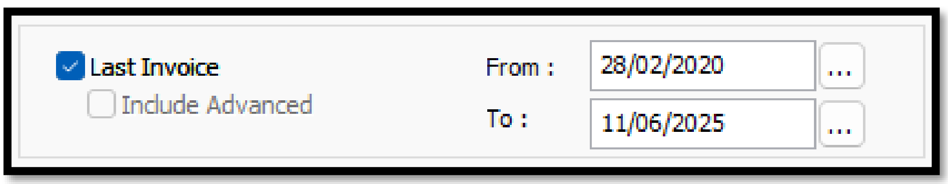




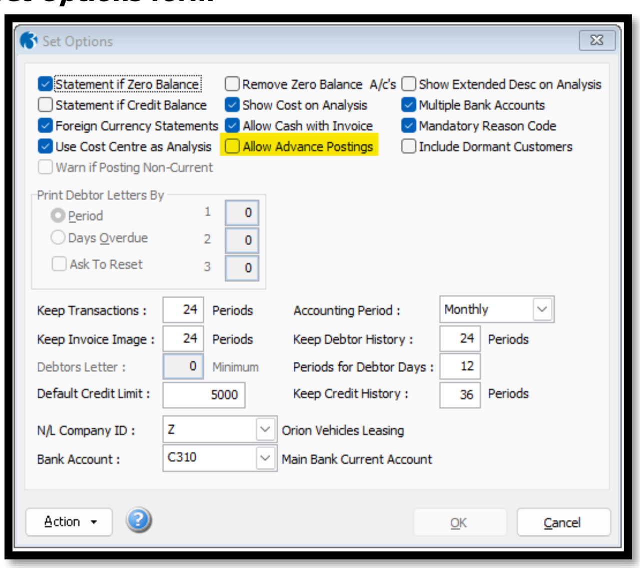
7. To include customers on the basis of the date when the last invoice was posted:

   - Select the Last Invoice option, then use the From and To boxes to define the date range.

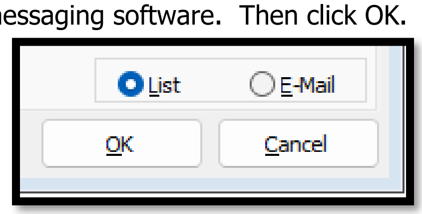
   - Tick the Include Advanced box to include invoices posted as advanced, or leave it unticked to exclude advanced invoices. The box is enabled if the Allow Advanced Postings box is ticked on the Sales Ledger - Utilities - Set Options form.



Sales Ledger - Utilities - Set Options form



8. Select List if you want to see a list of contacts or click E-Mail to send an email to each of the suppliers chosen in the Account From and Account To boxes. If you select E-Mail the application will launch your default MAPI-compliant email messaging software. Then click OK.



9. If you are printing a list of contacts, on the Publisher form, click the tab to select the output device you want to use and then complete any settings or options you want to apply to the output device. To process the output, click Publish.