

Customer List By Route

This report will show a list of customers on a specific Route number.

Here is a how to use and preview this report.

1. Open Report Parameters screen of Customer List by Route report.

Report Parameters - Customer List by Route

Preview Defaults Save Close

Remove

Layout

Filter Records (F3)

Field Name	Condition	From	To	Join
<input type="checkbox"/> Location	Between			And
<input type="checkbox"/> Route Id	Between			And
<input type="checkbox"/> Customer Status	Equal To			And
<input type="checkbox"/> Customer Name	Between			And
<input type="checkbox"/> Fill Method	Equal To			And
<input type="checkbox"/> Site Status	Equal To			And
<input type="checkbox"/> Ownership	Equal To			And
<input type="checkbox"/>				

Report Options

Description	Apply

Sort Options

Remove

Filter:

Sort Field Name	Sort Direction
Route Id	Ascending
Customer Name	Ascending
	Ascending

Ready

2. Fill out Selection Criteria section.
- Location** - Use this to filter the report by consumption sites' location number. User can select from the combo box list, or manually type on it. If field is left blank, the report includes all locations.
 - Route ID** - User can use the combo box button to select a value, or manually type on it. If left blank, the report includes all Routes.
 - Fill Method** - You can select from the combo box list, or manually type on it. This filter refers to the Fill Method used by the consumption site.
 - Customer Status** - The combo list box will show 'Active' and 'Inactive' status. If field is left blank, the report displays both Active and inactive sites.
 - Consumption Site Status** - The combo box button displays 'Active' and 'Inactive' status. If field is left blank, the report will display both Active and Inactive Site.
 - Tank Ownership** - You can select from the combo box list, or manually type on it. This filter refers to the Ownership field on Devices form.

- Preview Task List

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 Remove

📄

 Archive

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 Layout

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 Filter Records (F3)

<input type="checkbox"/>	Report Name	Status	Download	Details
<input type="checkbox"/>	Customer List by Route			

i21 Demo Setup Company(Source)

Route	Customer		
001-NW	0001005078 Customer A	Fill Method: Will Call	Credit Limit: 0.00
	Consumption Site: 1234 Main St., Fort Wayne, IN 46801	Last Delivery Date: 04/18/2016	Terms: 12 - Due on Receipt
	Consumption Site Instructions:	Location: 0001 - Fort Wayne	
	Tank Serial Number: ASN0123 Tank Serial Number: SN1234		
001-NW	0001005079 Customer B	Fill Method: Will Call	Credit Limit: 0.00
	Consumption Site: 111 Princeton Road, Fort Wayne, IN 46808	Last Delivery Date:	Terms: 3 - Net 30
	Consumption Site Instructions:	Location: 0001 - Fort Wayne	
	Tank Serial Number: Tank1234		

Parameters				
Location	From	0001 - Fort Wayne	To	0001 - Fort Wayne
Route Id	From	001-NW	To	001-NW
Customer Status	From	Active	To	
Customer Name	From		To	
Fill Method	From	Will Call	To	
Site Status	From		To	
Ownership	From		To	

Here is a how to use and preview this report.

1. Open Report Parameters screen of Customer List by Route report.

Field Name	Condition	From	To	Join
<input type="checkbox"/> Location	Between			And
<input type="checkbox"/> Route Id	Between			And
<input type="checkbox"/> Customer Status	Equal To			And
<input type="checkbox"/> Customer Name	Between			And
<input type="checkbox"/> Fill Method	Equal To			And
<input type="checkbox"/> Site Status	Equal To			And
<input type="checkbox"/> Ownership	Equal To			And

Sort Field Name	Sort Direction
Route Id	Ascending
Customer Name	Ascending

2. Fill out Selection Criteria section.

- **Location** - Use this to filter the report by consumption sites' location number. User can select from the combo box list, or manually type on it. If field is left blank, the report includes all locations.
- **Route ID** - User can use the combo box button to select a value, or manually type on it. If left blank, the report includes all Routes.
- **Fill Method** - You can select from the combo box list, or manually type on it. This filter refers to the Fill Method used by the consumption site.
- **Customer Status** - The combo list box will show 'Active' and 'Inactive' status. If field is left blank, the report displays both Active and inactive sites.
- **Consumption Site Status** - The combo box button displays 'Active' and 'Inactive' status. If field is left blank, the report will display both Active and Inactive Site.
- **Tank Ownership** - You can select from the combo box list, or manually type on it. This filter refers to the Ownership field on Devices form.

3. After setting the criteria, click **Preview** toolbar button. **Preview Task List** will display and will be followed by the report that looks like this:

Preview Task List

Remove

Archive

Filter:

Report Name

Status

Download

Details

Customer List by Route

Report Viewer

Customer List by Route

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Pdf

Customer List by Route

iRely Grain and Ag Co

Monday, March 16, 2015

01:51:05 PM

Route	Customer
060	0000000010 UNIOIL PETROLEUM Consumption Site: MAIN STREET, CAMBRIDGE, MN 55008 Consumption Site Instructions: test Tank Serial Number: SN12345678
063	0000000021 SHELL PROPANE Consumption Site: GREEN ROAD, CHISAGO CITY, MN 55080 Consumption Site Instructions: sample instruction Tank Serial Number: 1243342342 Tank Serial Number: Serial12345

Parameters				
Location	From		To	
Route Id	From		To	
Customer Status	From		To	
Customer Name	From		To	
Fill Method	From		To	
Site Status	From		To	
Ownership	From		To	