

# communication screen

Use this guide as a general overview to the different ways to generate customer information lists in the Communication screen.

## Customer Visits

Use this list to filter by first or last visit date. You will be prompted to select a date or date range then further filter your search by selecting First or Last Visit. This info is pulled directly from appt book. Pulls all customers whose First Visit or Last Visit is within the selected date range.

## Referrals

Use this list to filter by date referred or date rewarded. Referral must be selected in client file. Referral reasons can be user defined in Blueprints/Customer, although not necessary for this report. This list is not linked to the number of referrals to compensate or say thanks; rather it pulls each individual client that was referred.

## Confirmation Calls

Use this list to filter by Not Confirmed, Left Message, Confirmed, All or No Answer. The user is prompted to select a date range of appointments to confirm.

## Service Call Back

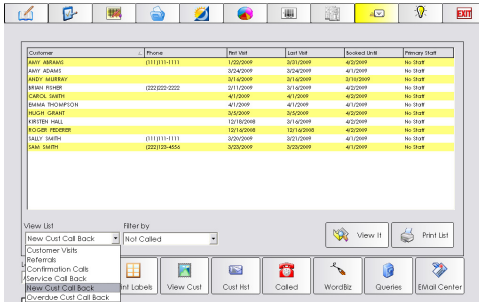
Use this list to filter by service setup which links to the number of days to call after a service. The number of days is set on the service setup in Blueprints/Service/Call # days after service. There is no date to pull from and can be filtered by Not Called or Service.

## New Customer Call Back

Use this list to determine new customers to call which is linked by the number of days to pass before calling new customers in Blueprints/Customer/Default Settings/# of days to pass before calling new customers. This list can be filtered by Not Called or Date.

## Overdue Customer Call Back

Use this list to determine when a customer is overdue which is linked to the number of days to consider overdue in Blueprints/Customer/Default Settings/# of days to consider customer overdue. It can be filtered by Not Called or Date.



Customer	Phone	First Visit	Last Visit	Scaled Visit	Primary Visit
AMY ARANS	(01111111)	1/23/2009	3/31/2009	4/3/2009	No Visit
AMY ADAMS		3/24/2009	3/24/2009	4/1/2009	No Visit
AMY ARANS		3/24/2009	3/18/2009	3/18/2009	No Visit
MARK FORD	(021022-2222)	3/11/2009	3/18/2009	4/2/2009	No Visit
SARA SMITH		4/1/2009	4/1/2009	4/2/2009	No Visit
SARA THOMPSON		4/1/2009	4/1/2009	4/1/2009	No Visit
ALICE SMITH		3/23/2009	3/23/2009	4/2/2009	No Visit
WALTER HILL		12/16/2008	3/18/2009	4/2/2009	No Visit
LOUIE REEDER	(01111111)	12/16/2008	12/16/2008	4/2/2009	No Visit
JOEL SMITH		3/23/2009	3/23/2009	4/1/2009	No Visit
SAUL SMITH	(022112-4556)	3/23/2009	3/23/2009	4/1/2009	No Visit

