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## ***Introduction***

### **About this document**

This document covers an issue with the **Quick Views - Full customer listing** not showing as many records as may be expected. The issue is caused by the marketing filters holding the values "Account Opened" and "Last Sale" filters and then applying them to the quick view.

### **Document Version**

1.0

### **Last Amendment**

11/10/2006

## Quick Views

The quick views screen enables you to prepare a number of reports which are intended to be exported and used with external software. A good example of this is the ability to prepare a file of customers who are then used as a mail merge source for a Microsoft Word Mail shot.

To get to the quick views screen from the main menu, click on Reporting>Quick Views



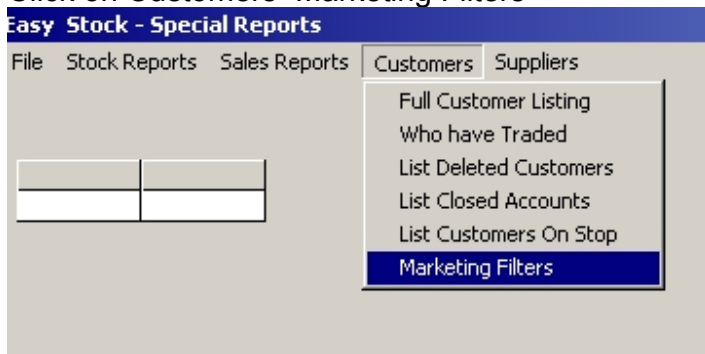
## Issue

The issue being discussed here is that when you first run a “Full Customer Listing”, fewer records are shown that actually should be. This is caused by 2 customer marketing filters which are set outside the control of EasyStock, which need to either be cleared or amended so as to include all the records expected.

## Customer Marketing Filters

While within the Quick Views screen prior to running any of the Customer Quick views it may be use full to amend the filters which are restricting the views.

Click on Customers>Marketing Filters



The following screen will be shown

**Customer Filters**

Location :

Assistant Contact :

Customer Status :

Activity :

Next Contact :  21/01/2004

Last Mailed :  21/01/2004

Last Phone :  21/01/2004

Account Opened :  05/05/2005

Last Sale :  05/05/2005

### ***Filters under discussion, an explanation***

#### **Account Opened**

If you alter the date within this filter and then place a tick in the box within the field, Only customers accounts which have been opened since this date are included in the selected customer listing

#### **Last Sale**

If you alter the date within this filter and then place a tick in the box within the field, only customers who have made either a sale or return which has been recorded in EasyStock, since this date are included in the selected customer listing.

Please notice that there is a tick in the Account Opened field and the Last Sale field. These need to be removed to allow the customer listings to show all records. Please note that these fields do have a function in that they allow you to filter accounts which have been opened since a specific date e.g. only list new accounts, and also gives the ability to identify accounts which have had recent activity – Last Sale.

Once the ticks have been amended as required, click on OK and run the Customer report which is needed.