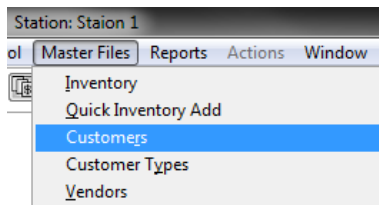


Using Construct a Query to find new customers for a particular month

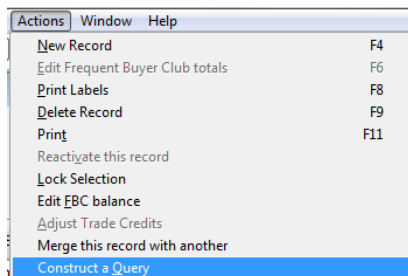
This process actually lists your customers by “Customer Since” and sends the results to an Excel spreadsheet. To keep this consistently working for month to month you should change the date to the first day of every new month but run the report on last day of every month at close of business. This way you are only viewing the customer added that month. Example: On 10/31 run the report for Customers Since 10/1.

First we’ll use Construct a Query to filter out the data in our Customer table so only those customers we want to report on will be shown.

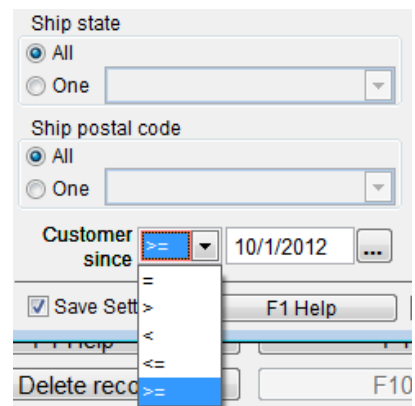
- Choose Master Files | Customers



- Next choose Actions | Construct a Query

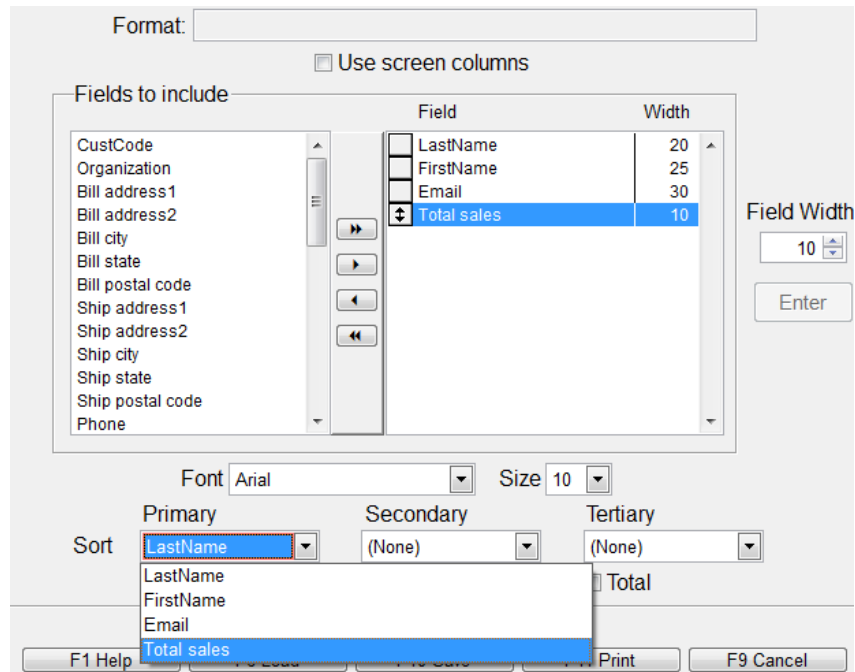


- On the Construct a Query screen set the values for Customer Since field with a >= “greater than/equal to” symbol and choose October 1 as the date. This lists all your customers that you have added since Oct 1.
- Choose F12 Run
- You may be prompted to “name the query” if this is something you’ll do over and over it may be easier to name the query so you don’t have to reset all the conditions on the screen each time. If this is not done often or the criterion changes nearly every time... then you may elect to not name (save) the query.

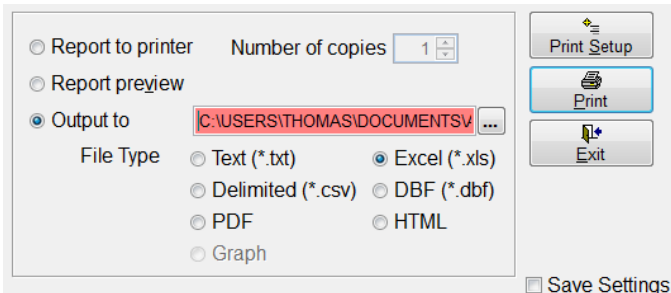


In either case when you run the query your Customer List page will be filtered to match the criterion you choose.

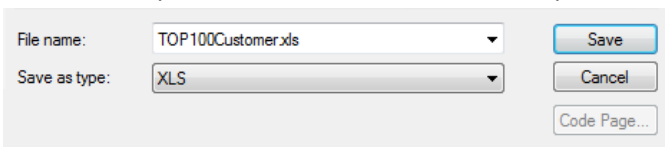
- Next we'll choose F11 Print
 - The following screen allows you choose what information will show in your report. For this example I am looking for Last Name, First Name, and email address. I also include the "Total Sales" field so I have this as a sort option.



- When I choose F11 print on this screen I may be prompted to save the report format. The same rules as above apply here – it is your choice to save it or recreate it each time.
- On print dialog I'll choose to export to an Excel spreadsheet



I click the ellipsis [...] button and name the output file. I called mine "TOP100Customers.xls"



- I choose Print to complete the process and send the file to the designated folder – If you did not set a directory the Program Files\Anthology is used by default.