

Special Reports

Special reports allow the generation of reports that don't fit into the block/frequency model of user reports. These reports are typically only configurable by on/off, and require additional calculations to send.

Customer Alert Report

The customer alert report polls every customer in record and checks it against predefined conditions, raising an alert if the values or calculations exceed a threshold. Using this, it is possible to send each Salesrep a list of all their assigned customers which triggered an alert at the end of the month.

These should be the same calculations found under the CounterCRM module, in the Recent Activity > Customer Alerts tab.

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