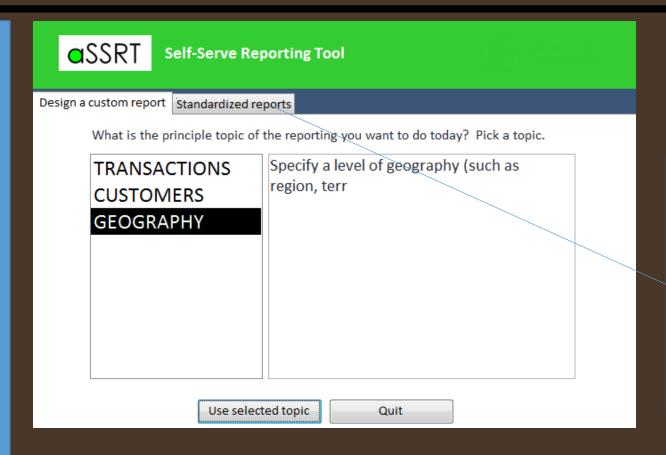The concept for the Self-Serve Reporting Tool (**aSSRT**) was that managers could produce highly customized ad hoc reports by specifying:

- criterion for any field in the tables in question

- any output field

- a variety of summary data for each entity returned (such as total revenue by product class).

Reports could be generated at the level of customer/prospect or for an entire geographic category: city, county state/province, sales territory.

Output would be to an Excel spreadsheet so that the results could be manipulated in pivot tables and in other ways.

aSSRT Self-Serve Reporting Tool

Design a custom report Standardized reports

What is the principle topic of the reporting you want to do today? Pick a topic.

TRANSACTIONS
CUSTOMERS
GEOGRAPHY

Specify a level of geography (such as region, terr
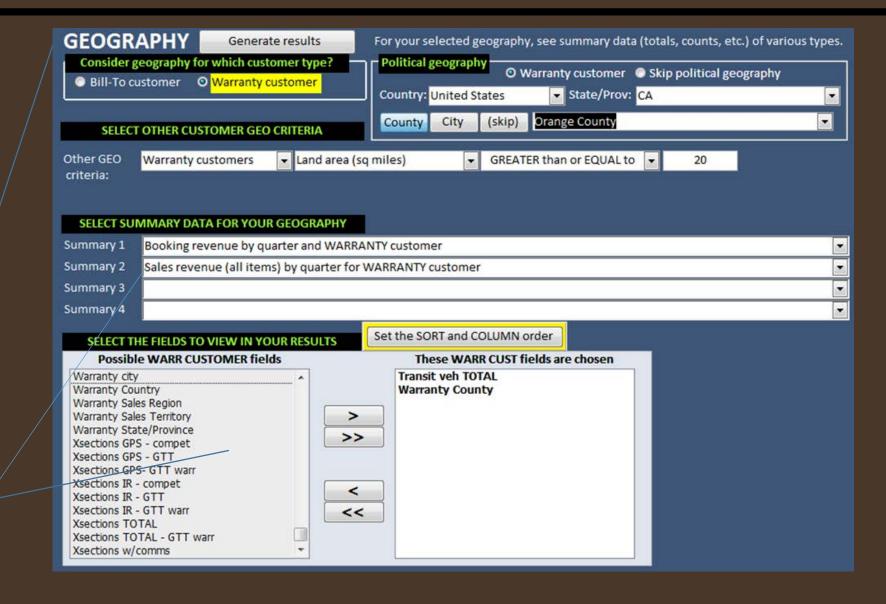
Use selected topic   Quit

There were also standardized reports: not customizable, but highly detailed. Among these were city profiles: specify a city and it would provide details on that city in the areas of market potential, current equipment, parties of interest, and more.

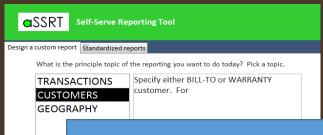aSSRT Self-Serve Reporting Tool

Design a custom report | Standardized reports

What is the principle topic of the reporting you want to do today? Pick a topic.

TRANSACTIONS
CUSTOMERS
GEOGRAPHY

Specify a level of geography (such as region, terr

GEOGRAPHY Generate results   For your selected geography, see summary data (totals, counts, etc.) of various types.

Consider geography for which customer type?

○ Bill-To customer   ⊙ Warranty customer

Political geography   ⊙ Warranty customer ○ Skip political geography

Country: United States ▼   State/Prov: CA ▼

County | City | (skip) | Orange County ▼

SELECT OTHER CUSTOMER GEO CRITERIA

Other GEO criteria: Warranty customers ▼ | Land area (sq miles) ▼ | GREATER than or EQUAL to ▼ | 20

SELECT SUMMARY DATA FOR YOUR GEOGRAPHY

Summary 1 | Booking revenue by quarter and WARRANTY customer ▼
Summary 2 | Sales revenue (all items) by quarter for WARRANTY customer ▼
Summary 3 | ▼
Summary 4 | ▼

SELECT THE FIELDS TO VIEW IN YOUR RESULTS   Set the SORT and COLUMN order

Possible WARR CUSTOMER fields   **These WARR CUST fields are chosen**

Warranty city
Warranty Country
Warranty Sales Region
Warranty Sales Territory
Warranty State/Province
Xsections GPS - compet
Xsections GPS - GTT
Xsections GPS- GTT warr
Xsections IR - compet
Xsections IR - GTT
Xsections IR - GTT warr
Xsections TOTAL
Xsections TOTAL - GTT warr
Xsections w/comms

Transit veh TOTAL
Warranty County

\>
\>\>
<
<<

The GEOGRAPHY category would let the user search for current or potential customers by GEOGRAPHIC LEVEL of their choice: country, state/province, county, and city. They could specify an additional criterion, like land area or population, to name just two.

The Excel output would have whatever fields you select here. In addition, any "Summary data" would also be displayed. Depending on what summary data is specified, this could be one field or many that are added to the results.

The type of control displayed in this area will be whatever is needed to capture the criterion the user wants. If you change the criterion, the controls might also change to accommodate what is desired.

When using the CUSTOMERS screen, far more criteria are available by which to search --- and multiple options for each criterion, too.

When multiple options are permitted for a criterion, a pop-up box like the one shown appears.

As with the GEOGRAPHY screen, output is to Excel with whatever output fields and summary data the user wishes to include.