



ICE Business System

Mobile Connections - Reporting

(Version – 2.0)

Learning Unit Guide

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Table of Contents

I : INTRODUCTION	4
II : OBJECTIVES	4
III : TARGET AUDIENCE.....	4
IV : PREREQUISITES	4
V : SCENARIOS	5
V.1 : General Reporting.....	5



I : Introduction

This Learning Unit Guide is reference-based, in that most of the information for the tasks can be found in the **Signature Learning Centre**.

This guide is designed as a workbook to be used during facilitator led learning.

It includes instructional materials, descriptions of business processes and details of demonstrations to be undertaken by the facilitator.

There are references to **menu paths** for accessing the functions within **ICE** application and **SLC References** for locating additional information in the **Signature Learning Centre**.

II : Objectives

To provide detail on steps required to use the reporting function of the ICE Mobile Connections Module.

III : Target Audience

Back of House Administrators and Managers with a need to report on activity in the ICE Mobile Connections Module, including sales, payments and adjustments.

IV : Prerequisites

- Mobile Connections Reporting Activities

V.1 : General Reporting

Page 5

Scenario 1: General Reporting

The reporting section of the ICE Mobile Connections Module allows users to customise reports through the use of filters.

This allows users to select certain types of plan, specific customers or groups of staff to report on.

**1.1: Access Connections Module****Objectives:**

- Log in to the Connections Module in order to access reporting functions.

SLC Reference:

- ICE Business Systems > Mobile Connections > Reporting Activities > Reporting.

Work Instructions**Screen: ICE Main**

1. Access **Connections**

Select menu path:

Operations > Connections > Mobile Connections

or

The **Mobile Connections** icon.

Screen: Enter Access Code

2. Enter your **Access Code** and press **OK**.

Screen: Select Branch

3. Select the appropriate **branch** from the drop-down menu.
4. Press **OK**.

Note:

If your system has only one branch set up, you will not be required to select a branch.

Screen: Connections Main

5. Click the **Reports** icon on the left of screen.

Outcomes:

- The Reporting screen is now active and users can run reports.

Notes:

- Access to areas within the Connections Module is set by your system administrator. If you do not have access to required areas, see your system administrator.



1.2: Generate Reports

Objectives:

- Select parameters to reports on and generate reports.

SLC Reference:

- ICE Business Systems > Mobile Connections > Reporting Activities > Reporting.

Work Instructions

Screen: Reporting - Main

- On the left of screen, click the type of report you wish to run.
 - **Sales Activity:** Displays detail of the quantity and dollar value of sales of mobile equipment and services.
 - **Reconciliation Activity:** Displays financial details of adjustments made to services and amounts that remain outstanding.
 - **Payment Activity:** Displays details of payments received for the sale of mobile services and the allocation of those payments.
 - **Connection Activity:** Displays non-financial summary of types of mobile connections that have been processed.
- In the middle area of the screen, highlight the specific report you wish to run.
- Select a period to report on by selecting a **Report Period** and **Date:**
 - **Day:** reports on the specific day entered in the **Date** field.
 - **Week:** Reports on a one week period starting from the **Start date** selected.
 - **Month:** Reports on a one month period starting from the **Start date** selected.
 - **Date Range:** Reports from the date entered in the **Start Date** field to the date entered in the **End date** field inclusive.
- Use the **Report Type** toggle to select the level of detail required in the report.
 - **Summary** reports show grouped totals for the selected data.
 - **Detailed** reports show the individual transactions that make up those totals.
- The report chosen at step 2 will determine which filters are available for selection.

Click on the tab containing the criteria you wish to specify.
For example: **Staff**, **Connection Types** or **Commission Type**.

6. Click the radio button for **Selected {data type}**.
For example: **Selected Staff** or **Selected Customer**.
7. Tick any data type that you wish to include in your report.
8. Repeat steps 5-7 for each data type that you wish to specify for the report.
9. Click **Run Report**.

Screen: Report Preview

10. Click the **Printer Icon**.
11. Click **OK** to send the report to the default printer, **or select a different printer by:**
 - Clicking **Setup**.
 - Selecting from the list of installed printers.
 - Clicking **OK**.
12. Click the **Door Icon** to return to the main reporting screen.

**Outcomes:**

- *Reports have now been previewed or printed.*

Notes:

- N/A