○ 21 : CUSTOMER REPORTS

THE REPORT SECTION OF THE AIS SYSTEM ALLOWS MANY OPTIONS WHILE RUNNING REPORTS. THERE ARE MANY BASIC REPORTS, AND ALSO CUSTOM REPORTS THAT YOU CAN CREATE WITH THE INFORMATION YOU WANT FROM THE CUSTOMER FILE IN THE PRINTED FORMAT YOU WANT.

FROM THE MAIN MENU PRESS 3 (CUSTOMER BILLING) THEN PRESS 7 (CUSTOMER REPORTS).

1. BALANCE REPORT :
    A. PRESS 1. THE DEFAULTS ARE ALREADY SET FOR NORMAL CHOICES. CHANGE ONLY WHAT YOU NEED THEN PRESS F1.
    B. CUSTOMER SORT SELECTION - PRESS ENTER
    C. YOU NOW HAVE AGING DATES BOX SHOWING. BE SURE THE CURRENT CHARGES START DATE IS THE SAME DATE AS WHEN YOU PRINT STATEMENTS. USE PAGE UP OR PAGE DOWN TO CHANGE ALL DATE LINES AT ONE TIME IF NEEDED. PRESS F1 TO CONTINUE.
    D. WHEN REPORT IS ON THE SCREEN PRESS F1 TO PRINT.

2. NAME / ADDRESS / PRICE / FLAGS - BASIC REPORT TO SHOW CUSTOMER NUMBER, NAME, ADDRESS, AND ALL SETTINGS PER EACH CUSTOMER.

3. NAME / ADDRESS / SALESMAN - BASIC REPORT TO SHOW CUSTOMER NUMBER, NAME, CONTACT NAME, CUSTOMER NOTES, AND SALESMAN CODE.

4. PHONE LIST - BASIC REPORT TO SHOW CUSTOMER NUMBER, NAME, ADDRESS, PHONE AND FAX NUMBERS.

5. CUSTOMER LABELS - BASIC REPORT TO PRINT MAILING LABELS. USES AVERY LABEL # 4013

6. INVOICE RECAPS - ALLOWS YOU TO SEE / PRINT TOTALS OF INVOICES BY EITHER ALL BY DATE RANGE, CUSTOMER NUMBER, COUNTERMAN CODE, OR SALESMAN CODE.

7. SALES ANALYSIS - ALLOWS YOU TO SEE LAST 12 MONTHS SALES TOTALS BY PRODUCT LINE.

NOTES

8. COMMISSION BY PL - BASIC REPORT TO SHOW PRODUCT LINE SALES, COST, AND PROFIT % BY SALESMAN CODE & DATE RANGE.

9. MECHANICS REPORT - BASIC REPORT TO SHOW MECHANIC CODE BY CUSTOMER NUMBER WITH SALES TOTALS.

A. CUSTOM REPORT - THIS REPORT ALLOWS YOU TO CHOOSE ANY INFORMATION FROM THE CUSTOMER INPUT SCREEN AND PRINT IT IN A REPORT.

B. CUSTOMER RENAME MENU - MAINTENANCE MENU.

C. DUPLICATE CUSTOMER REPORT - MAINTENANCE MENU.

D. CUSTOMER PART NUMBER HISTORY - CHOOSE CUSTOMER NUMBER TO SEARCH AND PRESS F1. CHOOSE DATE RANGE TO SEARCH AND PRESS F1. CHOOSE PRODUCT LINE TO SEARCH AND PRESS F1. USE FILTER TO STREAMLINE REPORT OR LEAVE BLANK AND PRESS F1. ANSWER SHOW COST Y / N. THE REPORT IS ON THE SCREEN. PRESS F1 TO PRINT

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