

Chapter 19 - Print Customers - (3 per page) - CPRT

To produce a detailed report of closed and/or current customers (3 per page), you can press the F10 key and at the command line type in "CPRT" and then press the ENTER key. You will be prompted for printer or file pathname. See [Chapter 10 Introduction to Reports](#) for additional information about the printer/file pathname screen. If you want to print directly to the default printer, press the ENTER key. If you want this information to print to another printer, type that printer number over the default and press the ENTER key. You will now be prompted for "Separate Locations". Press the ENTER key and accept the default of N for no. The report option screen will be displayed, see Figure 19-1.

```
PRINT RENTAL CUSTOMER REPORT (3 PER PAGE)

      REPORT ORDER: 1  ACCOUNT TYPE: 1
SELECT BY LOC OR LOC GROUPS: N

SELECT BY SLSMN OR ACCT MGR: N

      SELECT BY CUST TYPE: N
      SELECT BY CONTRACT TYPE: N
CURRENT/CLOSED CUSTOMERS: 1

      STARTING LAST NAME:
SELECT BY ZIP OR MODEL OR DESC: N

1) CUSTOMER NAME  2) ACCOUNT NUMBER  3) CONTRACT NUMBER
```

Figure 19- 1 Print Customer Report (3 per page) Screen

```
PRINT RENTAL CUSTOMER REPORT (3 PER PAGE)

REPORT ORDER: 1 ACCOUNT TYPE: 1
SELECT BY LOC OR LOC GROUPS: N

SORT BY LOCATION: Y
SELECT BY SLSMN OR ACCT MGR: N

SORT BY SALESMEN/ACCT MGRS: N
SELECT BY CUST TYPE: N
SELECT BY CONTRACT TYPE: N
CURRENT/CLOSED CUSTOMERS: 1

STARTING CONTRACT DATE: ENDING DATE: 12/31/79

TOTALS ONLY: N
SELECT BY BALANCE DUE: N
CALCULATE PROJECTIONS: N
STARTING LAST NAME:
SELECT BY ZIP OR MODEL OR DESC: N

ENTER AN "N" OR A "Y"
```

Figure 19- 2 Print Customer Report (3 per page) Screen after selecting through all fields

Figure 19-2 is a comprehensive view of the Customer Report Screen (3 per page) after you have entered or selected various options for the choices present to determine how you want your Customer Report to print. Each choice is explained here.

REPORT ORDER This gives you three options which are displayed on the bottom of the screen. These are:

- 1) **Customer name** - Select this if you want the report to print out in alphabetical order.
- 2) **Account Number** - Select this if you want the report to print out in numerical order by Account/Customer Number.
- 3) **Contract Number** - Select this if you want the report to print out in numerical order by Contract Number.

ACCOUNT TYPE There are two options. They are:

- 1) **RTO Accounts (Rent-to-Own)** Report will only print accounts that were established using the program "NEW".
- 2) **AR Accounts (Accounts Receivable)** Report will print only AR accounts that were established using the program "SALE" with accounts receivable payment form.

SELECT BY LOC OR LOC GROUP If you want to select by location(s) or location group(s), type Y for yes and enter the number here. The report will only print information about the requested location(s) or location group(s). If you have selected to run the report for more than one location, you will see the prompt "**SORT BY LOCATION**". This gives you the option to run the selected stores together as one combined report or have the report separated by store.

SORT BY LOCATION This option allows you to sort the report by location in ascending location order.

SELECT BY SLSMN OR ACCT MGR This option allows you to run the report by particular salesmen or account managers. If all salesmen or account managers are needed, press the ENTER key to accept the default of N for no. If you answer this prompt with a Y, the default will change to a 2 and your options will be displayed on the bottom of the screen (1) **SELECT BY SALESMEN** 2) **SELECT BY ACCT MGRS**). Enter the number next to the option you want. The prompt will then change and read "SALESMAN" or "ACCT MGRS" depending on the option you chose. You may then select up to ten salesmen or account manager numbers you want on this report. If you have selected more than one salesman or account manager you will see the prompt "**SORT BY SALESMEN/ACCT MGRS**". The default is N for no. If this option is answered with "Y" for yes, the report will group data by salesman or account manager. If you choose to sort the report by store and by salesman/account manager, the report will be printed by salesman/account manager sorted within the store.

SORT BY SALESMEN/ACCT MGR Prompt default is N for no. If this is answered with a Y for yes, this prompt allows you to run the report by particular salesmen or account manager. If you have not "selected by" one of these options and left the SELECT BY field as N for no; if you enter Y for yes in this SORT BY field, the default sort for this section is by salesman.

SELECT BY CUST TYPE Defaults to N for no. If this is answered with a Y for yes, you will then be prompted for "**CUST TYPES**". You may enter from one to ten different customer types. If you want all customer types, accept the default by pressing the ENTER key. Customer Types are set up and maintained using the program RCUSTYPE.

SELECT BY CONTRACT TYPE Defaults to N to no. If you want all contract types, press ENTER. If you want to select only certain contract types, type in a Y for yes (Customer Types are entered and maintained in the program RCNRTYPE). You will then be prompted for "**CONTRACT TYPES**". You may enter up to ten different contract types.

CURRENT/CLOSED CUSTOMERS Defaults to "1". Options are listed on the bottom of the screen. Type in the number next to the option you want.

If you choose: **1) Current, go to [Current Customers Report](#).**

If you choose: **2) Closed Customers, go to [Closed Customers Report](#).**

If you choose: **3) Current and Closed, go to [Current and Closed Report](#).**

If you chose option 1 Current Customers:

1) Current Customers Report (3 per page)

STARTING CONTRACT DATE

ENDING DATE

Enter the starting and ending agreement opening date for the time period you want this report to show. For example, if you wanted the report based on agreements entered during the month of June of 2004, you would enter 06/01/04 and 06/30/04. If you want all agreements, no matter when they were started, accept the defaults with the beginning date blank and the ending date as 12/31/79.

TOTALS ONLY Defaults to N for no. If answered with a Y for yes, the report will be only totals for each location showing Total Tickets This Location, Indicated BOR and Receivables and then a total for all locations on report combined. This does not include a detailed customer list. This is only totals.

SELECT BY BALANCE DUE Defaults to N for no. If answered with a Y for yes, you will then be prompted with "**BALANCE DUE**". Type in an amount and only customers whose agreement balance is less than the amount entered will be printed.

CALCULATE PROJECTIONS Defaults to N for no. If answered with a Y for yes, you will be prompted with "**PROJECTION FACTOR**". This defaults to 4.33 (the average amount of weeks for one month) Press the ENTER key to accept this default or type in the figure you want the projection based on. This option will cause an income projection figure to be printed.

STARTING LAST NAME If you want all customers printed, press the ENTER key. If you only want customers from a certain last name on, enter the last name or letter you wish the report to start with. The report begins with the entered name and proceeds to the end of the alphabet.

SELECT BY ZIP OR MODEL OR DESC If you want all zip codes, model numbers and descriptions, press the ENTER key. If you want to specify any of these things, type in a Y for yes. You will then be prompted "**SELECT BY ZIP, MODEL NBR OR DESC**" and the options will be listed on the bottom of the screen

- (1) **Select by Zip Code** – prompts for up to ten "ZIP CODES"
- (2) **Select by Model Nbrs** – prompts for up to three model numbers
- (3) **Select by Desc** – prompts for up to three descriptions

Press the F9 key. You will then be prompted "Any More Changes". When this is answered with an N for no, the report will begin counting and will print to the printer or file pathname you specified earlier.

If you chose option 2 Closed Customers:

2) Closed Customers Report (3 per page)

STARTING CLOSED DATE

ENDING DATE

Enter the starting and ending closed dates for the time period you want this report to show. For example, if you wanted the report based on customers who closed their accounts during the month of June 2004, you would enter 06/01/04 and 06/30/04. If you want all agreements, no matter when they were closed, accept the defaults with the beginning date blank and the ending date as 12/31/79.

SELECT BY CLOSED REASON If you want this report to print closed accounts regardless of the reason they were closed, press the ENTER key. If you want the report on only certain types of closed accounts, type in a Y for yes. You will be prompted for "**REASONS**" and the options will be listed on the screen. Type in the number representing the option you want (if the number representing the option you want is a single digit, make it a two digit. For example 2 would become 02). You may enter up to 10 different reasons. The closed reasons are listed below.

- 2) REFUND & CANCEL
- 3) PAYOUT SATISFACTORY
- 4) PAYOUT UNSATISFACTORY
- 5) REQUEST PICKUP
- 6) REPOSSES
- 7) SKIP
- 8) STOLEN
- 9) CHARGE OFF
- 10) EARLY BUYOUT

STARTING LAST NAME If you want all customers printed, press the ENTER key. If you only want customers from a certain last name on, enter the last name or letter you wish the report to start with. The report begins with the entered name and proceeds to the end of the alphabet.

SELECT BY ZIP OR MODEL OR DESC If you want all zip codes, model numbers and descriptions, press the ENTER key. If you want to specify any of these things, type in a Y for yes. You will then be prompted "**SELECT BY ZIP, MODEL NBR OR DESC**" and the options will be listed on the bottom of the screen

- (1) **Select by Zip Code** – prompts for up to ten "ZIP CODES"
- (2) **Select by Model Nbrs** – prompts for up to three model numbers
- (3) **Select by Desc** – prompts for up to three descriptions

Press the F9 key. You will then be prompted "Any More Changes". When this is answered with an N for no, the report will begin counting and will print to the printer or file pathname you specified.

If you chose option 3 Current and Closed Customers:

3) Current and Closed Customers Report (3 per page)

STARTING CONTRACT DATE

ENDING DATE

Enter the starting and ending agreement dates for the time period you want this report to show. For example, if you wanted the report based on customers who closed their accounts during the month of June 2004, you would enter 06/01/04 and 06/30/04. If you want all agreements, no matter when they were started, accept the defaults with the beginning date blank and the ending date as 12/31/79.

STARTING CLOSED DATE

ENDING DATE

Enter the starting and ending closed dates for the time period you want this report to show. For example, if you wanted the report based on customers who closed their accounts during the month of June 2004, you would enter 06/01/04 and 06/30/04. If you want all agreements, no matter when they were closed, accept the defaults with the beginning date blank and the ending date as 12/31/79.

STARTING LAST NAME

If you want all customers printed, press the ENTER key. If you only want customers from a certain last name on, enter the last name or letter you wish the report to start with. The report begins with the entered name and proceeds to the end of the alphabet.

SELECT BY ZIP OR MODEL OR DESC

If you want all zip codes, model numbers and descriptions, press the ENTER key. If you want to specify any of these things, type in a Y for yes. You will then be prompted "**SELECT BY ZIP, MODEL NBR OR DESC**" and the options will be listed on the bottom of the screen

- (1) **Select by Zip Code** – prompts for up to ten "ZIP CODES"
- (2) **Select by Model Nbrs** – prompts for up to three model numbers
- (3) **Select by Desc** – prompts for up to three descriptions

Press the F9 key. You will then be prompted "Any More Changes". When this is answered with an N for no, the report will begin counting and will print to the printer or file pathname you specified.

Example CPRT Report

For this example, the report was run for current AR Sales customers and is asking for a projection figure at the end of the report for store 1, see Figure 19-3.

```
PRINT RENTAL CUSTOMER REPORT (3 PER PAGE)

REPORT ORDER: 1 ACCOUNT TYPE: 2
SELECT BY LOC OR LOC GROUPS: Y
LOCATIONS: 1 0 0 0 0 0 0 0 0 0

SELECT BY SLSMN OR ACCT MGR: N

SORT BY SALESMEN/ACCT MGRS: N
SELECT BY CUST TYPE: N
SELECT BY CONTRACT TYPE: N
CURRENT/CLOSED CUSTOMERS: 1

STARTING CONTRACT DATE:          ENDING DATE: 12/31/79

TOTALS ONLY: N
SELECT BY BALANCE DUE: N
CALCULATE PROJECTIONS: Y PROJECTION FACTOR: 4.33
STARTING LAST NAME:
SELECT BY ZIP OR MODEL OR DESC: N

ENTER AN "N" OR A "Y"
```

Figure 19- 3 Print AR Sales Customer Report (3 per page) Screen with data

The resulting report will print 3 customers per page for the customer sales contracts that are open. The final page lists the total tickets, the amount of receivables and the total projected income for those customers. See Figure 19-4.

Chapter 19 - Additional Ways to Print Customers (3 per page) - CPRT

Name: AARON, PEGGY		Acct Nbr: 2001618	Store: 1	Salesman: 998	Pmt Amt: 243.84	Run Date: 12/08/06					
3113 SE 35TH AVE		Ticket Nbr: 10040909	Acct Mgr: 901	Tax Code: 6	Tax Amt: 0.00	Due Date: 1/08/07					
ANYTOWN TX 55555		Agreement Nbr: 12/08/06	Cust Type: S	Agreement Type: D	Grp Amt: 0.00	Last Due: 12/08/06					
Home Phone: (111)888-1234		Agreement Date: 12/08/06	Pmt Terms: M	# BOR Items: 0	ESP Amt: 0.00	Last Pay: 12/08/06					
Work Phone: (555)555-5555		Projection Amt: 243.84	Times Late: 0	Regular Total Due: 243.84							
Comments: COMMITTED TO PAY \$144.31 by 3/10/06 03:00pm					Agreement Bal: 2,926.08	Crtrt Amt: 2,926.08					
Pay Date	Due Date	Str	Recpt #	Pmt Amt	Tax Amt	Misc Amt	Late Amt	Total Pmt	Balance	Pmt Type	Salesman
12/08/06	12/08/06	1	00010001805	2,659.70-	0.00	0.00	0.00	0.00	2,659.70	INVOICE	998
12/08/06	12/08/06	1	00010001806	266.38-	0.00	0.00	0.00	0.00	2,926.08	INTEREST	998
Name: INSURANCE, ZERICK		Acct Nbr: 10011811	Store: 1	Salesman: 18	Pmt Amt: 12354.32	Run Date: 12/08/06					
1167 S US 1		Ticket Nbr: 10039066	Acct Mgr: 903	Tax Code: 6	Tax Amt: 0.00	Due Date: 11/30/04					
ANYTOWN TX 55555		Agreement Nbr: 39065	Cust Type: C	Agreement Type: Z	Grp Amt: 0.00	Last Due: 10/30/04					
Home Phone: (555)555-5555		Agreement Date: 10/30/04	Pmt Terms: M	# BOR Items: 0	ESP Amt: 0.00	Last Pay: 10/30/04					
Work Phone: (555)555-5555		Projection Amt: 12,354.32	Times Late: 0	Regular Total Due: 12,354.32							
Comments:					Agreement Bal: 12,354.32	Crtrt Amt: 12,354.32					
Pay Date	Due Date	Str	Recpt #	Pmt Amt	Tax Amt	Misc Amt	Late Amt	Total Pmt	Balance	Pmt Type	Salesman
10/30/04	10/30/04	1	00010001514	12,354.32-	0.00	0.00	0.00	0.00	12,354.32	INVOICE	18
Name: INSURANCE, ZERICK		Acct Nbr: 10011811	Store: 1	Salesman: 18	Pmt Amt: 9,221.43	Run Date: 12/08/06					
1167 S US 1		Ticket Nbr: 10039072	Acct Mgr: 903	Tax Code: 6	Tax Amt: 0.00	Due Date: 11/30/04					
ANYTOWN TX 55555		Agreement Nbr: 39071	Cust Type: C	Agreement Type: Z	Grp Amt: 0.00	Last Due: 10/30/04					
Home Phone: (555)555-5555		Agreement Date: 10/30/04	Pmt Terms: M	# BOR Items: 0	ESP Amt: 0.00	Last Pay: 10/30/04					
Work Phone: (555)555-5555		Projection Amt: 9,221.43	Times Late: 0	Regular Total Due: 9,221.43							
Comments:					Agreement Bal: 9,221.43	Crtrt Amt: 9,221.43					
Pay Date	Due Date	Str	Recpt #	Pmt Amt	Tax Amt	Misc Amt	Late Amt	Total Pmt	Balance	Pmt Type	Salesman
10/30/04	10/30/04	1	00010001515	9,221.43-	0.00	0.00	0.00	0.00	9,221.43	INVOICE	18
RUN DATE: 12/08/06		RSSS APPLIANCES				CPRT REPORT	PAGE: 1				
TIME: 11:36:55		AR CUSTOMERS SEQUENCED BY CUSTOMER NAME									
		CURRENT CUSTOMERS									
		SELECTED BY LOCATIONS: 1									
		CONTRACT DATES OF: THRU 12/31/79									
		PROJECTION FACTOR: 4.33									
TOTAL TICKETS THIS REPORT: 7		RECEIVABLES: 71906.56		PROJECTION AMOUNT: 69224.32							
TIME FINISHED: 11:36:55											

Figure 19- 4 Print AR Sales Customers Partial Resulting Report