

## Chapter 18 - Printing Customers - CPRTA

This program is used to produce a detailed report on closed and/or current customers. To get into this program, select Customer Reports - CPRTA off the Sales Reports Menu, or press the F10 key off of any menu and at the command line, type in "CPRTA" and press the ENTER key. You will be prompted for printer or file pathname. 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. See [Chapter 10 Introduction to Reports](#) for additional information about the printer/file pathname screen. You will now be prompted for "Separate Locations". Press the ENTER key to accept the default of N.

The report option screen will be displayed, see Figure 18-1. Select account type of 2 to report on AR sale customers.

```
PRINT CUSTOMER REPORT
  FORMAT: 1    PRINT COMMENTS: Y    PRINT INVENTORY: Y
  REPORT ORDER: 1    ONLY 1 ITEM TICKETS: N    ACCT TYPE: 1
  SELECT BY LOC OR LOC GROUPS: N

  SELECT BY: N

  SELECT BY CUST TYPE: N
  SELECT BY AGMT/CONT TYPE: N
  CURRENT/CLOSED CUSTOMERS: 1

  STARTING LAST NAME:    RE-OPENED TICKET INDR: I
  SELECT BY ZIP/MODEL/DESC/ADV C: N

  WANT BIRTHDAY REPORT: N
1) 1 LINE 2) 3 LINE 3) 1 LINE #2 4) 1 LINE #3 5) BATCH AUDIT 6) ROAD REP RECAP
```

**Figure 18- 1 Print Customer Report Screen**

```

PRINT CUSTOMER REPORT
  FORMAT: 1      ONLY COMMENTS: N      PRINT INVENTORY: Y
  REPORT ORDER: 1  ONLY 1 ITEM TICKETS: N  ACCT TYPE: 1
  SELECT BY LOC OR LOC GROUPS: N

      SORT BY LOCATION: Y
      SELECT BY: Y
  ACCT MGRS: 1   2   3   4   5   6   7   8   9   10
  SORT BY SALESMAN/ACCT MGRS: Y
  SELECT BY CUST TYPE: N
  SELECT BY AGMT/CONT TYPE: N
  CURRENT/CLOSED CUSTOMERS: 1
  SELECT FLOOR PLAN AGENT: N
  STARTING AGMT/CONT DATE:
  SUMMARIZE BY ZIP: N      ENDING DATE: 12/31/79
  TOTALS ONLY: N          BY CUST TYPE: N  TAX IN BALANCES: N
  SELECT BY BALANCE DUE: N  PAYOFF CUSTS: N
  CALCULATE PROJECTIONS: N      ONLY ESP ACCTS: N
  STARTING LAST NAME:          SINGLE TICKS ONLY: N
  SELECT BY ZIP/MODEL/DESC/ADV C: N  RE-OPENED TICKET INDR: I

      WANT BIRTHDAY REPORT: N
      ENTER AN "N" OR A "Y"
    
```

**Figure 18- 2 Print Customer Report Screen after selecting through all fields**

Figure 18-2 is a comprehensive view of the Customer Report Screen after you have entered and selected various options for the choices present to determine how you want your Customer Report to print. Each choice is explained here.

**FORMAT** Options will be displayed on the bottom of the screen. The choices are:

**1) One Line** – This will print one line per agreement with the following information on each agreement:

- a) Customer #
- b) Customer Name
- c) Ticket #
- d) Store #
- e) Account Manager #
- f) Payment Term
- g) Last Paid Date
- h) Next Due Date
- i) Agreement Balance
- j) Payment Amount
- k) GRP Amount
- l) ESP Amount
- m) Tax Amount
- n) Total Due
- o) Will include comments and inventory if comments and inventory are chosen in criteria screen.

**2) Three Line** – This report gives what the one line report shows plus:

- a) Street address
- b) City
- c) State

- d) Zip Code
- e) Phone Number
- f) Times Late
- g) #BOR Items (indicated)
- h) Terms
- i) Birthday
- j) Social Security number

**3) One Line #2-** This will print one line per agreement with the following information on each agreement:

- a) Customer #
- b) Ticket #
- c) Name
- d) Address
- e) Agreement Date
- f) Last Paid Date
- g) Next Due Date
- h) Inventory Description
- i) Account Manager #
- j) Payment Amount
- k) GRP Amount
- l) Tax Amount
- m) Balance

**4) One Line #3 -** This will print one line per agreement with the following information on each agreement:

- a) Customer #
- b) Name
- c) Address
- d) Work Phone
- e) Home Phone
- f) Social Security #
- g) Drivers License #
- h) Brief Description of Inventory (if a rental agreement)

**PRINT COMMENTS** Do you want the report to print any comments that might be on the customer record? This prompt defaults to Y for yes. If you accept the default, this prompt will change to "ONLY COMMENTS". ONLY COMMENTS defaults to N for no. If you change ONLY COMMENTS to Y, this gives you the option to run only those customers with comments on their record. The comments printed here are located on the first page of comments in the Take Payments (RP) screen.

**PRINT INVENTORY** Do you want the inventory on each agreement to print on this report? The default is Y for yes. If you do not want the inventory to print on this report, type in an N for no.

**REPORT ORDER** This gives you four 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 by customer's last name in alphabetical order.
- 2) Account Number** - Select this if you want the report to print out in numerical order by Account Number/Customer Number.
- 3) Agreement/Cntr #** - Select this if you want the report to print out in numerical order by Agreement/Contract Number.

**4) Ticket Number** - Select this if you want the report to print out in numerical order by Ticket Number.

**ONLY 1 ITEM TICKETS** Do you want this report to only print customers with one item on their ticket?

**ACCOUNT TYPE** There are seven options. They are:

**1) RTO Accounts (Rent-to-Own)** Report will only print accounts that were established as RTO and/or RTR customers.

**2) AR Accounts (Accounts Receivable)** Report will print only accounts that were established using the program "SALE" with an accounts receivable (AR) payment form.

**3) Loan Accounts**

**4) RTO and Loan**

**5) Special Orders**

**6) Misc Fee**

**7) RTO/Fee**

Enter the number beside the option you want to use.

**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** This option allows you to run the report by particular salesmen account managers or employee number. If all salesmen, account managers and employee numbers are needed, press the ENTER key to accept the default of N for no. If you answer this prompt with a Y, you will be prompted "Select by Salesman/Acct Mgr/Input Emp Nbr". Your options will be displayed on the bottom of the screen: **1) SALESMAN, 2) ACCT MGR, 3) INPUT EMP NBR** (the employee who entered the agreement into the computer). Enter the number next to the option you want. The prompt will then change and read "SALESMAN", "ACCT MGRS" or "INPUT EMP NBR" depending on the option you chose. You may then select up to ten salesmen, account managers or employee numbers (if selecting by salesmen, account manager or employee numbers, use a 5 digit number in this field, for example, 00001). If you have selected more than one salesman, account manager, employee number, you will see the prompt "**SORT BY SALESMAN/ACCT MGRS**".

**SORT BY SALESMAN/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 salesman, account manager, or employee number if you had selected by salesmen, account manager, or employee number respectively. If you have not selected by one of these options and left the SELECT BY

field as N; 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). If you want a selection window, enter a "?". Using your arrow keys, if necessary, highlight the Customer Type you want and press the ENTER key.

**SELECT BY AGMT/CONT TYPE** Defaults to N for no. If you want all contract types press the ENTER key to accept the default of N. If you want to select only certain contract types, type in a Y for yes. You will then be prompted for "**CONTRACT TYPES**". You may enter up to ten different contract types (Contract types are set up and maintained using the program RCNRTYPE). After you have selected Y, if you want a selection window, enter a "?". Using your arrow keys, if necessary, highlight the Agreement/Contract Type you want and press the ENTER key.

**CURRENT/CLOSED CUSTOMERS** Prompt default is "1" for current customers. Options are listed on the bottom of the screen. Type in the number next to the option you want.

- 1) Current Customers** – This will give you customers that have an open agreement.
- 2) Closed Customers** – This will give you customers that have a closed agreement.
- 3) Current and Closed Customers** – This will give you customers that have both, open and closed agreements.

If you chose option 1 Current Customers:

### 1) Current Customers Report

```

PRINT CUSTOMER REPORT
      FORMAT: 1      ONLY COMMENTS: N      PRINT INVENTORY: Y
      REPORT ORDER: 1  ONLY 1 ITEM TICKETS: N      ACCT TYPE: 1
SELECT BY LOC OR LOC GROUPS: N

      SORT BY LOCATION: Y
      SELECT BY: Y
ACCT MGRS: 1      2      3      4      5      6      7      8      9      10
SORT BY SALESMAN/ACCT MGRS: Y
      SELECT BY CUST TYPE: N
SELECT BY AGMT/CONT TYPE: N
CURRENT/CLOSED CUSTOMERS: 1 ← Current Customers
SELECT FLOOR PLAN AGENT: N
STARTING AGMT/CONT DATE:
      ENDING DATE: 12/31/79
      SUMMARIZE BY ZIP: N      BY CUST TYPE: N      TAX IN BALANCES: N
      TOTALS ONLY: N      PAYOFF CUSTS: N
      SELECT BY BALANCE DUE: N
      CALCULATE PROJECTIONS: N      ONLY ESP ACCTS: N
      STARTING LAST NAME:
      RE-OPENED TICKET INDR: I
SELECT BY ZIP/MODEL/DESC/ADV C: N

WANT BIRTHDAY REPORT: N
      ENTER AN "N" OR A "Y"

```

**Figure 18- 3 Print Customer Report Option 1 Current Customers**

The following are the fields that follow this prompt change shown in Figure 18-3.

**INSURANCE RPT** Accept the default of (N)o or ENTER A Y TO SELECT THE INSURANCE EXPIRATION REPORT, if you have insurance information in Customer Maintenance (RCUSTOMT) under the F7 car info field, only customers with open agreements whose insurance is about to expire will be on this report. If answered with a Y the next prompt will be date range to use for expiration dates.

**SELECT FLOOR PLAN AGENT** Defaults to N for no. If answered with a Y for yes, you will see the prompt "**FLOOR PLAN AGENT NBR**". Type in the number for the Floor Plan Agent you want on this report.

**STARTING AGMT/CONT DATE**                      **ENDING DATE**  
 Enter the starting and ending date for the time period you want this report to show. For example, if you want all agreements established in June 2004, you would use:  
 Starting Agmt/Cont Date: 06/01/04  
 Ending Date: 06/30/04  
 If you want all open agreements, no matter when they were started, accept the defaults with the beginning date blank and the ending date as 12/31/79.

**SUMMARIZE BY ZIP** Defaults to N for no. If answered with a Y for yes, after the customer list has printed, the report will print a page on which you will see a line across for each individual zip code on this report with

the number of customers, payment amount, GRP amount, ESP amount, tax amount, total amount, and receivables. Under this, you will have a line showing the totals for each of these zip codes.

**(SUMMARIZE) BY CUST TYPE** Defaults to N for no. If answered with a Y for yes, after the customer list has printed, the report will print a page on which you will see a line across for each individual customer type showing the number of customers, payment amount, GRP amount, ESP amount, tax amount, total amount, and receivables. Under this option, there will be a line showing the totals for each of these customer types.

**TAX IN BALANCES** Do you want the tax included in the balances printed on this report? Default is N for no. If answered Y for yes, the report will include taxes in the balances.

**TOTALS ONLY** Defaults to N for no. If answered Y for yes, the report will print a summary page only for each location showing Total Tickets This Location, Indicated BOR and Receivables and then a total for all locations on report combined. If you answer Y to summarize by Zip code or Customer code the report will print the summary page for those selections.

**PAYOFF CUSTS** By entering a Y for yes, the report will select only customers that will payoff in an entered number of months. You will now be prompted "**# Mnths till payout**". Defaults to 1 month. Enter a two character number for the number of months until payout you want this report based on. For example 3 months would be entered as 03.

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

**ONLY ESP ACCOUNTS** Default is N for no. Enter a Y for yes, if you want the report to show only agreements with ESP (Extended Service Policy) amounts.

**CALCULATE PROJECTIONS** Defaults to N for no. If answered Y for yes, you will be prompted with "PROJECTION FACTOR" for weekly term agreements. 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 number of weekly payments you want to use to calculate the monthly income projection. The report will print the dollar amount you should receive this month (rent income only) based on your current customer base. Any weekly agreement will be multiplied by this projection factor to calculate the projected income for this month.

**SINGLE TICKETS ONLY** Do you want the report to print only those customers with one open agreement? Default is N for no. If you change to Y for yes, the report will print customers with single tickets only.

**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 will begin with the entered name and continue through the end of the alphabet.

**RE-OPENED TICKET INDR** When tickets are re-opened, they are marked as re-opened. These options allow you to exclude or include them, or just look at re-opened tickets.

**E = Exclude Re-Opened Tickets**

**O = Only Re-Opened Tickets**

**I = Include Re-Opened Tickets**

**SELECT BY ZIP/MODEL/DESC/ADV C** If you want all zip codes, model numbers and descriptions, press the ENTER key to accept the default of N for no. If you want to specify any of these things, type Y for yes in this field. You will then be prompted "**SELECT BY ZIP/MODEL NBR/DESC/ADV**" 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

(4) **Select by Advertising Code** – prompts for up to ten advertising codes.

**WANT BIRTHDAY REPORT** Enter a Y for yes, if you want a report showing the birthday of your customers. If this prompt is answered with a Y for yes, you will see the prompts: **Month** so you can enter the month you want birthdays from. **Starting Day** so you can enter the earliest day of that month you want used. **THRU** to enter the latest day of that month you want used.

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

If you chose option 2 Closed Customers:

## 2) Closed Customers Report

```

PRINT CUSTOMER REPORT
      FORMAT: 1      ONLY COMMENTS: Y      PRINT INVENTORY: Y
      REPORT ORDER: 1  ONLY 1 ITEM TICKETS: N  ACCT TYPE: 1
SELECT BY LOC OR LOC GROUPS: N

      SORT BY LOCATION: Y
      SELECT BY: Y
ACCT MGRS: 1 2 3 4 5 6 7 8 9 10
SORT BY SALESMAN/ACCT MGRS: Y
      SELECT BY CUST TYPE: N
      SELECT BY AGMT/CONT TYPE: N
CURRENT/CLOSED CUSTOMERS: 2 ← Closed Customers
      STARTING CLOSED DATE:      ENDING DATE: 12/31/79
      STARTING AGMT/CONT DATE:    ENDING DATE: 12/31/79
      SELECT BY CLOSED REASON: N
      CALCULATE PROJECTIONS: N
      ONLY FORESIGHT WARRANTY AGMTS: N      TOTALS ONLY: N
      RECEIVABLES WRITE OFF REPORT: N      ONLY ACCOUNTS W/O OPEN TICKETS: N
      STARTING LAST NAME:      RE-OPENED TICKET INDR: I
SELECT BY ZIP/MODEL/DESC/ADV C: N

WANT BIRTHDAY REPORT: 
ENTER AN "N" OR A "Y"
    
```

Figure 18- 4 Print Customer Report Screen selecting closed customers

The following are the fields that follow this prompt change shown in Figure 18-4.

### STARTING CLOSED DATE

### ENDING DATE

Enter the starting and ending closed date for the customer agreements you want to see on this report. For example, if you want all agreements closed in June 2004, you would use:

Starting Agmt/Cont Date: 06/01/04

Ending Date: 06/30/04

If you want all closed agreements, no matter when they were closed accept the defaults with the beginning date blank and the ending date as 12/31/79.

### STARTING AGMT/CONT DATE

### ENDING DATE

Enter the starting and ending open dates for the time period you want this report to show. For example, if you want all agreements that were also opened in June 2004, you would use:

Starting Agmt/Cont Date: 06/01/04

Ending Date:

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.

### SELECT BY CLOSED REASON

If you want the report to print closed accounts regardless of the reason they were closed, press ENTER. If you want the report to show only certain types of closed accounts, type in a Y. You will be prompted for "REASONS". The options will be listed on

the screen. Type in the number representing the option you want from the options listed on the screen (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 following are the reasons:

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

**CALCULATE PROJECTIONS** If you want the report to show the calculated projections, enter a Y. You will be prompted for Factor, enter the factor you want used.

**TOTALS ONLY** If you want the report to show totals only, enter a Y.

**ONLY FORESIGHT WARRANTY AGMTS** If you want this report to show only Foresight Warranty Agreements, enter a Y.

**ONLY ESP ACCOUNTS** If you want this report to show only those agreements with ESP, enter a Y.

**RECEIVABLES WRITE OFF REPORT** Can be run only if Format Type 1 and Report Order 2. This will give you the amount of RTO receivables that was left on a customer that now is closed.

**ONLY ACCOUNTS W/O OPEN TICKETS** If you want this report to print only those accounts without an open ticket, enter a Y. Otherwise, press the ENTER key to accept the default of N.

**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 will begin with the entered name and continue through the end of the alphabet.

**RE-OPENED TICKET INDR** When tickets are reopened, they are marked as such. These options allow you to exclude or include them, or just look at reopened tickets.

- E = Exclude Re-Opened Tickets**
- O = Only Re-Opened Tickets**
- I = Include**

**SELECT BY ZIP/MODEL/DESC/ADV C** If you want all zip codes, model numbers and descriptions, press the ENTER key to accept the default of N. If you want to specify any of these things, type a Y for yes. You will then be prompted "**SELECT BY ZIP/MODEL NBR/DESC/ADV**" 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
- (4) **Select by Advertising Code** – prompts for up ten advertising codes.

**WANT BIRTHDAY REPORT** Enter a Y if you want a report showing the birthday of your customers. If this prompt is answered with a Y, you will see the prompts: **Month** enter the month you want birthdays from. **Starting Day** enter the earliest day of the month you want used. **THRU** enter the latest day of the month you want used.

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 gave.

If you chose option 3 Current and Closed Customers:

### 3) Current and Closed Customers Report

```

PRINT CUSTOMER REPORT
      FORMAT: 1      ONLY COMMENTS: N      PRINT INVENTORY: Y
      REPORT ORDER: 1  ONLY 1 ITEM TICKETS: N  ACCT TYPE: 1
SELECT BY LOC OR LOC GROUPS: N

      SORT BY LOCATION: Y
      SELECT BY: Y
      ACCT MGRS: 1    2    3    4    5    6    7    8    9    10
SORT BY SALESMAN/ACCT MGRS: Y
      SELECT BY CUST TYPE: N
      SELECT BY AGMT/CONT TYPE: N
      CURRENT/CLOSED CUSTOMERS: 3
WANT RENTAL ACTIVITY REPORT: N  USE ZIP FOR LOC: N
      STARTING AGMT/CONT DATE:      ENDING DATE: 12/31/79
      STARTING CLOSED DATE:      ENDING DATE: 12/31/79

      STARTING LAST NAME:      RE-OPENED TICKET INDR: I
SELECT BY ZIP/MODEL/DESC/ADV C: N

      WANT BIRTHDAY REPORT: N
      ENTER AN "N" OR A "Y"
    
```

**Figure 18-5 Print Customer Report Screen selecting current and closed Customers**

The following are the fields that follow this prompt change shown in Figure 18-5.

**WANT RENTAL ACTIVITY REPORT** Defaults to N. If you want to know what Advertising Source brought the current customers in and the closed reasons for all closed customers, answer Y. This will give you a report which shows you each of the Advertising Sources, the number of closed customers each different source brought in and the indicated balance on rent (BOR) on this. Also gives an analysis of accounts opened and indicated BOR during the time period you are running this report on compared to the accounts closed and indicated BOR. It also gives you the Keep Rate percent and Average Days on Books.

**USE ZIP FOR LOC** This gives you the option to use the last three digits of the zip code instead of the store location for sorting. Answer Y for yes, if this is how you want the report sorted. Answer N for no, if you want the report sorted by store.

**WANT DETAILED ACTIVITY REPORT** You will only see this prompt if a Y was entered in the Want Rental Activity Report prompt. Defaults to N for no. If you want full detail for each opened and closed account, answer Y. If a Y is entered, you will be prompted, "**Starting Activity Date & Ending Date**". Enter the earliest and latest dates you want the system to use when building this report.

**STARTING AGMT/CONT DATE**

**ENDING DATE**

Enter the starting and ending dates for the time period you want this report to show. For example, if you want all agreements established in June 2004, you would use the dates:

Starting Agmt/Cont Date: 06/01/04

Ending Date: 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 dates for the time period you want this report to show. For example, if you want agreements closed in June 2004, you would use the dates:

Starting Closed Date: 06/01/04

Ending Date: 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 ENTER. 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 will begin with the entered name and continue through the end of the alphabet.

**RE-OPENED TICKET INDR** When tickets are reopened, they are marked as such. These options allow you to exclude or include them, or just look at reopened tickets.

**E = Exclude Re-Opened Tickets**

**O = Only Re-Opened Tickets**

**I = Include**

**SELECT BY ZIP/MODEL/DESC/ADV C** If you want all zip codes, model numbers and descriptions, press the ENTER key to accept the default of N. If you want to specify any of these things, type Y for yes. You will then be prompted "**SELECT BY ZIP/MODEL NBR/DESC/ADV**" 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

(4) **Select by Advertising Code** – prompts for up ten advertising codes.

**WANT BIRTHDAY REPORT** Enter a Y if you want a report showing the birthday of your customers. If this prompt is answered with a Y for yes, you will see the prompts: **Month** enter the month you want birthdays from. **Starting Day** enter the earliest day of the month you want used. **THRU** enter the latest day of the month you want used.

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 CPRTA Reports

### Current Customer List

The customer list is an alphabetical printout of all current accounts, separated by store.

If you run the default report for one location only and select open AR accounts, you will get a comprehensive customer list with information on this report that can be used to manually accept payments and allow your staff to work with customers if the system is not available, see Figures 18-6 and 18-7. There are many ways to tailor this report to your business' specifications.

```

PRINT CUSTOMER REPORT
  FORMAT: 1      ONLY COMMENTS: N      PRINT INVENTORY: Y
  REPORT ORDER: 1  ONLY 1 ITEM TICKETS: N  ACCT TYPE: 2
  SELECT BY LOC OR LOC GROUPS: Y
    LOCATIONS: 1      0      0      0      0      0      0      0      0      0

  SELECT BY: N

  SORT BY SALESMAN/ACCT MGRS: N
  SELECT BY CUST TYPE: N
  SELECT BY AGMT/CONT TYPE: N
  CURRENT/CLOSED CUSTOMERS: 1
  SELECT FLOOR PLAN AGENT: N
  STARTING AGMT/CONT DATE:
    SUMMARIZE BY ZIP: N      ENDING DATE: 12/31/79
    TOTALS ONLY: N      BY CUST TYPE: N  TAX IN BALANCES: N
    SELECT BY BALANCE DUE: N  PAYOFF CUSTS: N
    CALCULATE PROJECTIONS: N      ONLY ESP ACCTS: N
    STARTING LAST NAME:      SINGLE TICKS ONLY: N
  SELECT BY ZIP/MODEL/DESC/ADV C: N  RE-OPENED TICKET INDR: I

  WANT BIRTHDAY REPORT: 
                        ENTER AN "N" OR A "Y"
    
```

Figure 18- 6 Print Customer Report Screen for store customer list Screen

CUSTOMER		TICKET	ACCT	PMT	LAST	NEXT	AGMT/CNT	PMT	GRP	ESP	TAX	TOTAL	
NUMBER	CUSTOMER NAME	NUMBER	STORE	MGR	TERMS	PAID	DUE	BALANCE	AMT	AMT	AMT	DUE	
2001618	AARON, PEGGY	10040785	1	901	W	11/28/06	12/05/06	285.94	9.86	0.00	0.00	0.81	10.67
MODEL NBR	SERIAL NBR	BAR CODE #	DESCRIPTION				AGMT/CNT #	AGMT/CNT PERIODS	AGMT/CNT AMT	PMT AMT			
EATOS3D43HT	R 00995	48122	STEREO				12/27/05	78 WEEKS	769.08	9.86			
2002698	ABNEY, JOHN	10040838	1	2	W	11/28/06	11/30/06	956.76	14.07	2.11	0.00	1.16	17.34
MODEL NBR	SERIAL NBR	BAR CODE #	DESCRIPTION				AGMT/CNT #	AGMT/CNT PERIODS	AGMT/CNT AMT	PMT AMT			
EPTOS32A32	R 10258298	45997	PORTABLE TV				9/21/06	78 WEEKS	1,097.46	14.07			
3001116	ANDREWS, KAY PATRICIA 772-464-3514	10030564	1	901	W	11/28/06	9/22/05	29.99	5.00	0.00	2.47	37.46	
MODEL NBR	SERIAL NBR	BAR CODE #	DESCRIPTION				AGMT/CNT #	AGMT/CNT PERIODS	AGMT/CNT AMT	PMT AMT			
EETOS50A61	N 56667464	45712	BIG SCREEN				3/15/03	130 WEEKS	3,898.70	29.99			
3001116	ANDREWS, KAY PATRICIA 772-464-3514	10039356	1	901	W	11/28/06	7/10/05	33.91	1.00	0.15	0.00	0.08	1.23
MODEL NBR	SERIAL NBR	BAR CODE #	DESCRIPTION				AGMT/CNT #	AGMT/CNT PERIODS	AGMT/CNT AMT	PMT AMT			
FOBER6380	R 47998	47998	COMPUTER DESK				11/20/04	67 WEEKS	67.00	1.00			

Figure 18-7 Snapshot of resulting store sales customer list report

### Current Customer Report by Zip Code

This summary report is available to give you an indication of what zip code areas are important to each store. It has many uses in collection, scheduling, projections and advertising areas. See Figures 18-12 and 18-13.

```

PRINT CUSTOMER REPORT
  FORMAT: 1      ONLY COMMENTS: N      PRINT INVENTORY: Y
  REPORT ORDER: 1  ONLY 1 ITEM TICKETS: N  ACCT TYPE: 2
SELECT BY LOC OR LOC GROUPS: Y
  LOCATIONS: 1  0  0  0  0  0  0  0  0  0

SELECT BY: N

SORT BY SALESMAN/ACCT MGRS: N
  SELECT BY CUST TYPE: N
  SELECT BY AGMT/CONT TYPE: N
  CURRENT/CLOSED CUSTOMERS: 1
  SELECT FLOOR PLAN AGENT: N
  STARTING AGMT/CONT DATE:
  SUMMARIZE BY ZIP: Y      ENDING DATE: 12/31/79
  TOTALS ONLY: Y      BY CUST TYPE: N  TAX IN BALANCES: N
  SELECT BY BALANCE DUE: N  PAYOFF CUSTS: N
  CALCULATE PROJECTIONS: Y  FACTOR: 4.33  ONLY ESP ACCTS: N
  STARTING LAST NAME:      RE-OPENED TICKET INDR: I
SELECT BY ZIP/MODEL/DESC/ADV C: N

WANT BIRTHDAY REPORT: N
  ENTER AN "N" OR A "Y"
    
```

Figure 18-12 Snapshot of resulting store customer report by zip code Screen

RUN DATE: 12/08/06  
 TIME: 12:57:11  
 RSSS APPLIANCES  
 CURRENT AR CUSTOMERS BY CUSTOMER NAME  
 SELECTED BY LOCATIONS: 1  
 AGMT/CONT DATES OF: THRU 12/31/79  
 PROJECTION FACTOR: 4.33  
 PAGE: 1

ZIP CODE	NBR OF CUSTS	PAYMENT AMT	GRP AMT	ESP AMT	TAX AMT	TOTAL AMT	RECEIVABLES	PROJECTION
11111	7	446.96	67.05	0.00	36.87	550.88	9,619.60	1,030.24
55555	304	10,189.06	1,412.72	0.00	840.89	12,442.67	355,540.35	26,724.27
TOTAL:	311	10,636.02	1,479.77	0.00	877.76	12,993.55	365,159.95	27,754.51

TIME FINISHED: 12:57:12

**Total accounts at Store 1** (points to 311)

**Total payments collected for Store 1 All Zip Codes** (points to 10,636.02)

**Totals are real time. Includes payment receivable only.** (points to 365,159.95)

**Projection of payment amount only for Store 1.** (points to 27,754.51)

Figure 18-13 Snapshot of resulting store customer report by zip code Screen

### Closed Customer Report in Detail

Closed customer accounts and reasons closed can be selected within two dates. The report can be separated by reasons closed. The following options are available as reasons closed: Refund and Cancel; Payout Satisfactory; Payout Unsatisfactory; Request Pickup; Repossess; Skip; Stolen; Charge Off; Early Buyout. In this example we ran a comprehensive closed customer report. See Figures 18-14 and 18-15.

```

PRINT CUSTOMER REPORT
  FORMAT: 1      ONLY COMMENTS: N      PRINT INVENTORY: Y
  REPORT ORDER: 1  ONLY 1 ITEM TICKETS: N  ACCT TYPE: 2
  SELECT BY LOC OR LOC GROUPS: Y
  LOCATIONS: 1  0  0  0  0  0  0  0  0  0

  SELECT BY: N

  SORT BY SALESMAN/ACCT MGRS: N
  SELECT BY CUST TYPE: N
  SELECT BY AGMT/CONT TYPE: N
  CURRENT/CLOSED CUSTOMERS: 2
  STARTING CLOSED DATE:          ENDING DATE: 12/31/79
  STARTING AGMT/CONT DATE:       ENDING DATE: 12/31/79
  SELECT BY CLOSED REASON: N
  CALCULATE PROJECTIONS: N
  ONLY FORESIGHT WARRANTY AGMTS: N
  RECEIVABLES WRITE OFF REPORT: N
  STARTING LAST NAME:
  SELECT BY ZIP/MODEL/DESC/ADV C: N

  TOTALS ONLY: N
  ONLY ESP ACCTS: N
  ONLY ACCOUNTS W/O OPEN TICKETS: N
  RE-OPENED TICKET INDR: I

  WANT BIRTHDAY REPORT: N
  ENTER AN "N" OR A "Y"
    
```

Figure 18-14 Snapshot of resulting store closed customer report in detail Screen

RUN DATE: 12/08/06		RSSS APPLIANCE				CPRTA REPORT		PAGE: 1			
TIME:12:18:37		CLOSED AR CUSTOMERS SEQUENCED BY CUSTOMER NAME									
SELECTED BY LOCATIONS: 1											
CLOSED DATES OF:		THRU 12/31/79									
AGMT/CONT DATES OF:		THRU 12/31/79									
CUSTOMER NUMBER	CUSTOMER NAME	TICKET NUMBER	ACCT STORE	PMT MGR	TERMS	CLOSED DATE	NEXT DUE	# DAYS LATE	LAST PMT OR PAST DUE AMT	CLOSED REASON	REC'V AMT
1005873	AAAAAAAAAAAA	1024959	1	18	M	12/15/01	11/12/01	0	0.00	PAYOUT SATISFACTORY	0.00
MODEL NBR	SERIAL NBR	BAR CODE #	DESCRIPTION		AGMT/CONT#	AGMT/CNT PERIODS	AGMT/CNT AMT	PMT AMT			
AKAMADRS2662AC	0011215961	8989	REFRIGERATOR		9/12/01	0 MONTHS		0.00			
1011174	AAAAAAAAAAAAAAAAAAAA	1060355	1	18	M	2/08/06	3/11/06	0	0.00	PAYOUT SATISFACTORY	0.00
MODEL NBR	SERIAL NBR	BAR CODE #	DESCRIPTION		AGMT/CONT#	AGMT/CNT PERIODS	AGMT/CNT AMT	PMT AMT			
AKKITKUDIO2IRBS	FS5302840	25385-1	DISHWASHER		1/20/06	0 MONTHS		0.00			
AKKITKHS155LSS	TR35068935	25384-4	MICROWAVE		1/20/06	0 MONTHS		0.00			
AKKITRGS1901PBS	XT0105045	25383-01	RANGE		1/20/06	0 MONTHS		0.00			
1004796	AAAAAAAAAAAA	1027042	1	18	M	12/10/01	4/08/02	0	0.00	PAYOUT SATISFACTORY	0.00
MODEL NBR	SERIAL NBR	BAR CODE #	DESCRIPTION		AGMT/CONT#	AGMT/CNT PERIODS	AGMT/CNT AMT	PMT AMT			
EBMITWT46809	118204	11189	TV PROJECTION		12/05/01	0 MONTHS		0.00			
1004796	AAAAAAAAAAAA	1027044	1	18	M	12/12/01	4/08/02	0	0.00	PAYOUT SATISFACTORY	0.00
MODEL NBR	SERIAL NBR	BAR CODE #	DESCRIPTION		AGMT/CONT#	AGMT/CNT PERIODS	AGMT/CNT AMT	PMT AMT			
ESBSEAM53B	12960872AC	11211	SPEAKERS		12/05/01	0 MONTHS		0.00			
ESJVCRX8010VBK	096X2637	11085	STEREO		12/05/01	0 MONTHS		0.00			
EVMITDD6020	109409	11343	DVD		12/05/01	0 MONTHS		0.00			
EVMITHSU746	34913M	8814	VCR		12/05/01	0 MONTHS		0.00			
EMSEUB20B	8310	8310	ACCESSORIES		12/05/01	0 MONTHS		0.00			
EMSEUB20B	10781	10781	ACCESSORIES		12/05/01	0 MONTHS		0.00			
EMHON109305	MISC		ACCESSORIES		12/05/01	0 MONTHS		0.00			
DELIVERY	MISC		NON TAX		12/05/01	0 MONTHS		0.00			

Figure 18-15 Snapshot of resulting store closed customer report in detail Screen