

Chapter 17 - Printing Customer Reports

Print Rental Customers - CPRTA

This program is used to produce a detailed report on closed and/or current customers. To get into this program, select "Report Menu" off the Store Home Menu, then select "Print Customer Reports" off the Reports Menu, then select "Print Customer Marketing", 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. Enter the correct information or press the enter key to accept the default. See [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 17-1.

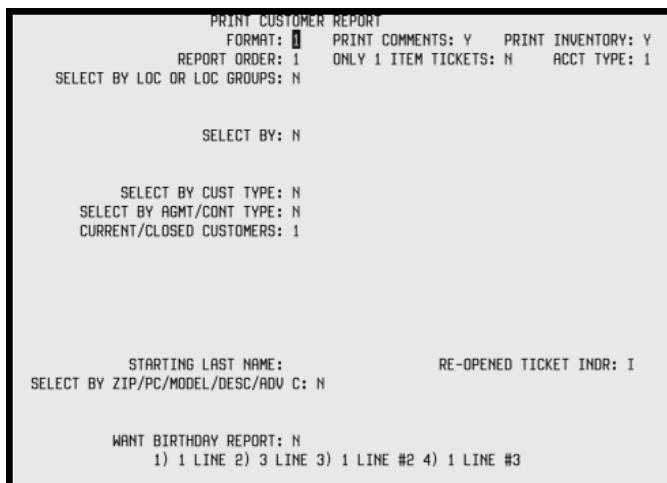


Figure 17- 1 Print Customer Report Screen

Figure 17-2 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.

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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: Y
LOCATIONS: 101  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 PRINT ADD'L INVENTORY INFO: N
SELECT FLOOR PLAN AGENT: N      WKLY PAYING MTHLY: N
STARTING AGMT/CONT DATE:      ENDING DATE: 12/31/79
SUMMARIZE BY ZIP/PC: N      BY CUST TYPE: N  TAX IN BALANCES: N
TOTALS ONLY: N      PAYOFF CUSTS: N
SELECT BY BALANCE DUE: N      ONLY ESP ACCTS: N
CALCULATE PROJECTIONS: N      SINGLE TICKS ONLY: N
STARTING LAST NAME:      RE-OPENED TICKET INDR: I
SELECT BY ZIP/PC/MODEL/DESC/ADV C: N

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

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Figure 17- 2 Print Customer Report Screen after selecting through all fields

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) Customer Type
- g) Contract Type
- h) Times Late
- i) #BOR Items (indicated)
- j) Terms
- k) RTO Receivable Amount
- l) Birthday

m) Social Security number (with proper security)

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 (Club Fee Tickets)**
- 7) **RTO/Fee (Rental & Club Fee Tickets)**

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. 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.

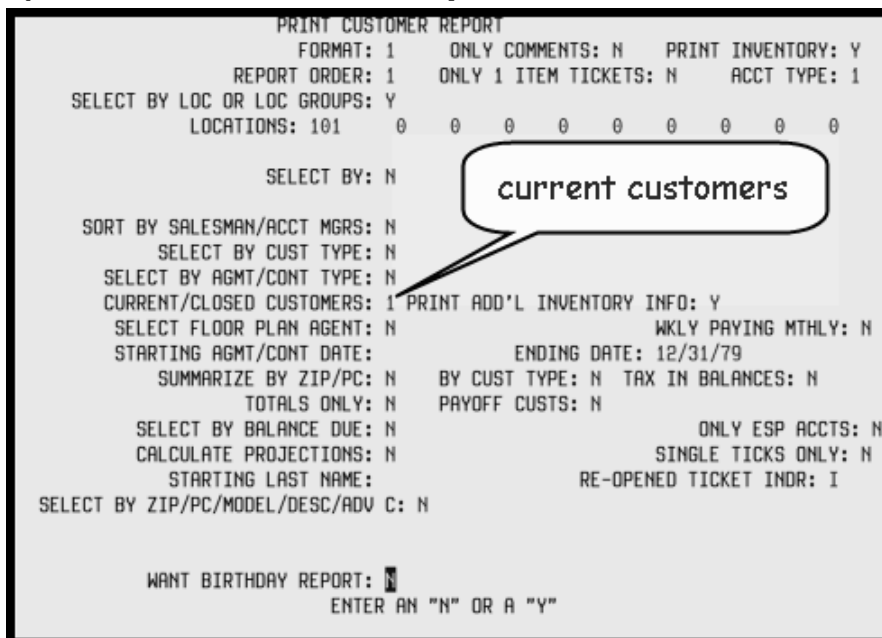
SELECT BY AGMT/CONT TYPE Defaults to N for no. If you want all contract types press the enter key to accept the default of N. If you want to select only certain contract types, type in a Y for yes. You will then be prompted for **"CONTRACT TYPES"**. You may enter up to ten different contract types. After 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



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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: Y
  LOCATIONS: 101  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:      ENDING DATE: 12/31/79
  SUMMARIZE BY ZIP/PC: N      BY CUST TYPE: N   TAX IN BALANCES: N
  TOTALS ONLY: N      PAYOFF CUSTS: N
  SELECT BY BALANCE DUE: N      ONLY ESP ACCTS: N
  CALCULATE PROJECTIONS: N      SINGLE TICKS ONLY: N
  STARTING LAST NAME:      RE-OPENED TICKET INDR: I
  SELECT BY ZIP/PC/MODEL/DESC/ADV C: N

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

A callout box with the text "current customers" points to the line "CURRENT/CLOSED CUSTOMERS: 1" in the screenshot.

Figure 17- 3 Print Customer Report Option 1 Current Customers

The following are the fields that follow this prompt change shown in Figure 17-3.

PRINT ADD'L INVENTORY INFO Defaults to N for no. If answered with a Y for yes to print original cost, mark up and down payment amounts on the report.

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.



WKLY PAYING MTHLY Defaults to N for no. If answered with a Y for yes, will print only weekly agreements that last paid monthly.

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 March 2010, you would use:

Starting Agmt/Cont Date: 03/01/10

Ending Date: 03/31/10

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.

Note this is a time sensitive report. If an agreement was opened on March 1st and closed prior to month end, the agreement will not show up on this report.

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 "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 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

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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: Y
  LOCATIONS: 101  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  PRINT ADD'L INVENTORY INFO: Y
  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/PC/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"
  
```

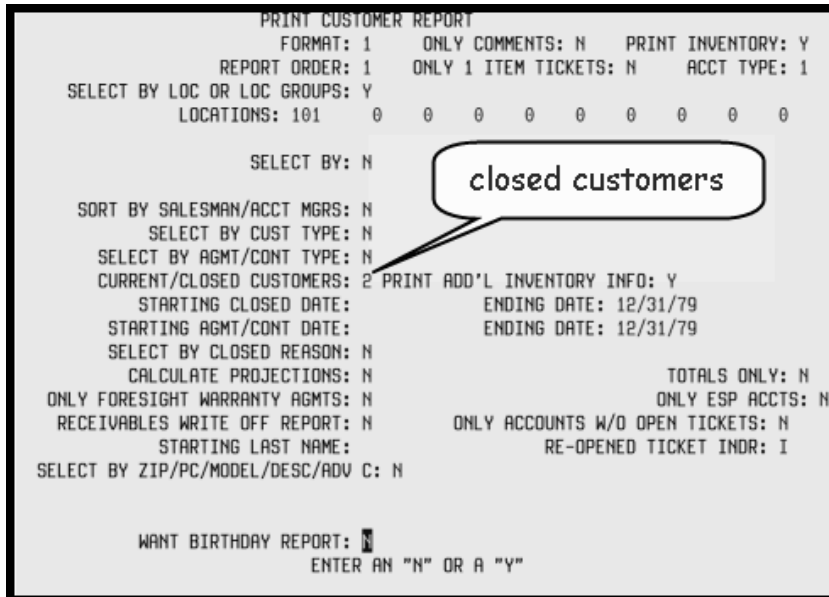


Figure 17- 4 Print Customer Report Screen selecting closed customers

The following are the fields that follow this prompt change shown in Figure 17-4.

PRINT ADD'L INVENTORY INFO Defaults to N for no. If answered with a Y for yes to print original cost, mark up and down payment amounts on the report.

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 March 2010, you would use:

Starting Agmt/Cont Date: 03/01/10
Ending Date: 03/31/10

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 March 2010, you would use:

Starting Agmt/Cont Date: 03/01/10
Ending Date: 03/31/10

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 or press enter to accept the default of 4.33.

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 are selected. 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:

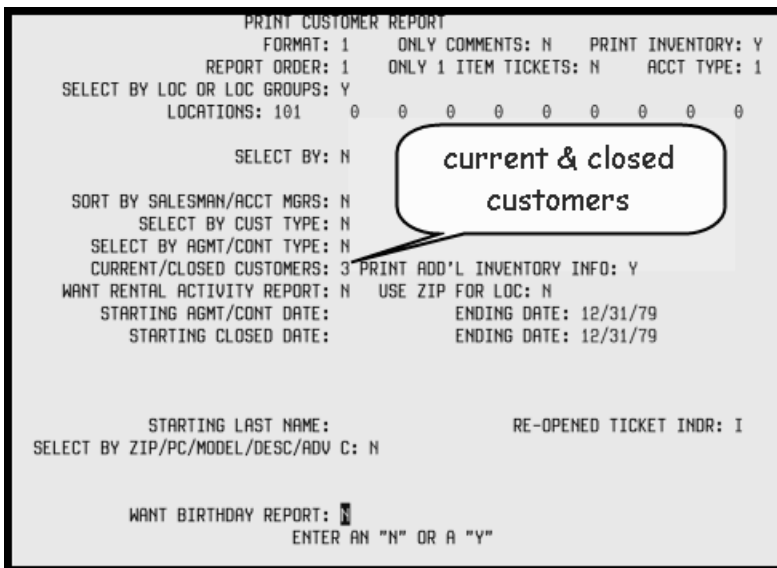
- (1) **Select by Zip Code** – prompts for up to ten zip codes
- (2) **Select by Model Nbrs** – prompts for up to three model numbers
- (3) **Select by Desc** – prompts for up to three descriptions
- (4) **Select by Advertising Code** – prompts for up ten advertising codes.

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: Y
  LOCATIONS: 101 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: 3 PRINT ADD'L INVENTORY INFO: Y
  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/PC/MODEL/DESC/ADV C: N

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

Figure 17-5 Print Customer Report Screen Selecting Current and Closed Customers

The following are the fields that follow this prompt change shown in Figure 17-5.

PRINT ADD'L INVENTORY INFO Defaults to N for no. If answered with a Y for yes to print original cost, mark up and down payment amounts on the report.

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 March 2010, you would use the dates:

Starting Agmt/Cont Date: 03/01/10
Ending Date: 03/31/10

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: 03/01/10
Ending Date: 03/31/10

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 to 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, 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 17-6 and 17-7. There are many ways to tailor this 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: Y
  LOCATIONS: 101 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 PRINT ADD'L INVENTORY INFO: Y
  SELECT FLOOR PLAN AGENT: N      WKLY PAYING MTHLY: N
  STARTING AGMT/CONT DATE:      ENDING DATE: 12/31/79
  SUMMARIZE BY ZIP/PC: N      BY CUST TYPE: N  TAX IN BALANCES: N
  TOTALS ONLY: N      PAYOFF CUSTS: N
  SELECT BY BALANCE DUE: N      ONLY ESP ACCTS: N
  CALCULATE PROJECTIONS: N      SINGLE TICKETS ONLY: N
  STARTING LAST NAME:      RE-OPENED TICKET INDR: I
  SELECT BY ZIP/PC/MODEL/DESC/ADV C: N
  WANT BIRTHDAY REPORT: 
  ENTER AN "N" OR A "Y"
  
```

Figure 17- 6 Print Customer Report Screen for Store Customer List Screen

RUN DATE: 03/18/10 RSSS 12.5 PAGE: 107
 TIME:13:36:39 CURRENT RTO CUSTOMERS BY CUSTOMER NAME
 SELECTED BY LOCATIONS: 101
 AGMT/CNT DATES OF: THRU 12/31/79

CUSTOMER NUMBER	CUSTOMER NAME	TICKET NUMBER	STORE	ACCT MGR	PMT TERMS	LAST PAID	NEXT DUE	AGMT/CNT BALANCE	PMT AMT	GRP AMT	ESP AMT	TAX AMT	TOTAL DUE
100037	YOUNG, PAUL	100132	101	1	W	11/03/09	11/14/09	264.00	8.00	1.00	0.00	0.63	9.63
COMMENT: WBI \$150.77 by 11/03/09 05:00													
MODEL NBR	SERIAL NBR	BAR CODE #	DESCRIPTION	AGMT/CNT #	AGMT/CNT PERIODS	AGMT/CNT AMT	PMT AMT						
AOMAYMDC4650AWW	N 38740215LJ	38740215LJ	DISHWASHER	6/16/07	156 WEEKS	1,248.00	8.00						
100037	YOUNG, PAUL	100134	101	1	W	11/03/09	11/14/09	210.55	6.38	1.00	0.00	0.52	7.90
COMMENT: WBI \$150.77 by 11/03/09 05:00													
MODEL NBR	SERIAL NBR	BAR CODE #	DESCRIPTION	AGMT/CNT #	AGMT/CNT PERIODS	AGMT/CNT AMT	PMT AMT						
FDASHD199000225	N 100035	100035	DINING ROOM BETTER	6/16/07	156 WEEKS	995.28	6.38						
100037	YOUNG, PAUL	102013	101	1	W	11/03/09	11/14/09	724.00	28.00	2.80	0.00	2.16	32.96
COMMENT: WBI \$150.77 by 11/03/09 05:00													
MODEL NBR	SERIAL NBR	BAR CODE #	DESCRIPTION	AGMT/CNT #	AGMT/CNT PERIODS	AGMT/CNT AMT	PMT AMT						
ARWRLD2GHEXNL	R SU2531341	SU2531341	REFRIGERATOR BETTER	11/23/07	126 WEEKS	3,528.00	28.00						
100037	YOUNG, PAUL	125821	101	1	W	11/03/09	11/14/09	382.86	10.00	1.00	0.00	0.77	11.77
COMMENT: WBI \$150.77 by 11/03/09 05:00													
MODEL NBR	SERIAL NBR	BAR CODE #	DESCRIPTION	AGMT/CNT #	AGMT/CNT PERIODS	AGMT/CNT AMT	PMT AMT						
FBASHB190-79/M	R 104510	104510	BUNKBED GOOD	8/10/09	52 WEEKS	520.00	10.00						
TOTAL TICKETS THIS REPORT: 717 INDICATED BOR: 1 RECEIVABLES: 1,035,661.19 AGREEMENT AMT: 1,629,164.61													
TIME FINISHED:13:36:39													

Figure 17- 7 Snapshot of Resulting Store Rental Customer List Report

Current Customer Report with Calculated Projections 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 17-8 and 17-9.

```

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: Y
  LOCATIONS: 101  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 PRINT ADD'L INVENTORY INFO: N
  SELECT FLOOR PLAN AGENT: N      WKLY PAYING MTHLY: N
  STARTING AGMT/CONT DATE:      ENDING DATE: 12/31/79
  SUMMARIZE BY ZIP/PC: Y      BY CUST TYPE: N  TAX IN BALANCES: N
  TOTALS ONLY: Y      PAYOFF CUSTS: N
  SELECT BY BALANCE DUE: N      ONLY ESP ACCTS: N
  CALCULATE PROJECTIONS: Y  FACTOR: 4.33  SINGLE TICKETS ONLY: N
  STARTING LAST NAME:      RE-OPENED TICKET INDR: I
  SELECT BY ZIP/PC/MODEL/DESC/ADV C: N

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

Figure 17- 8 Snapshot of Resulting Store Customer Report by Zip Code Screen

RUN DATE: 03/19/10
 TIME: 14:34:18

RSSS 12.5
 CURRENT RTO CUSTOMERS BY CUSTOMER NAME
 SELECTED BY LOCATIONS: 101
 AGMT/CNT DATES OF: THRU 12/31/79
 PROJECTION FACTOR: 4.33

PAGE: 1

ZIP/POSTAL	CODENBR	OF CUSTS	PAYMENT AMT	GRP AMT	ESP AMT	TAX AMT	TOTAL AMT	RECEIVABLES	PROJECTION
55555		8	178.47	17.95	0.00	13.75	210.17	12,455.25	772.78
78475		3	172.61	17.26	0.00	13.29	203.16	9,729.83	747.40
77777		706	12,926.99	1,285.91	0.00	995.07	15,207.97	1,013,476.11	55,930.56
TOTAL:		717	13,278.07	1,321.12	0.00	1,022.11	15,621.30	1,035,661.19	57,450.74

TIME FINISHED: 14:34:19

total accounts for store 101

total payments collected at store 101 for all zip codes

totals are real time. Includes payment receivable only.

projection of payment amount for store 101

Figure 17- 9 Snapshot of Resulting Store Customer Report by Zip Code

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 17-10 and 17-11.

```

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: Y
  LOCATIONS: 101  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  PRINT ADD'L INVENTORY INFO: N
  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      TOTALS ONLY: N
  ONLY FORESIGHT WARRANTY AGMTS: N  ONLY ESP ACCTS: N
  RECEIVABLES WRITE OFF REPORT: N  ONLY ACCOUNTS W/O OPEN TICKETS: N
  STARTING LAST NAME:          RE-OPENED TICKET INDR: I
  SELECT BY ZIP/PC/MODEL/DESC/ADV C: N
  WANT BIRTHDAY REPORT: N
  ENTER AN "N" OR A "Y"
  
```

Figure 17-10 Snapshot of Resulting Store Closed Customer Report in Detail Screen

CUSTOMER		TICKET	ACCT	PMT	CLOSED	NEXT	#	DAYS	LAST	PMT	OR	RECV	
NUMBER	CUSTOMER NAME	NUMBER	STORE	MGR	TERMS	DATE	DUE	LATE	PAST	DUE	AMT	REASON	
00074	ZAUGG, TIMOTHY	100068	101	1	W	3/05/08	2/02/08	32	104.64			REQUESTED PICKUP	0.02-
COMMENT: WILL BE IN \$107.22 by 2/21/08													
MODEL NBR	SERIAL NBR	BAR CODE #	DESCRIPTION		AGMT/CONT#	AGMT/CNT	PERIODS	AGMT/CNT	AMT	PMT	AMT		
FLASH2600086/88	R 100602	100602	LIVINGROOM ELITE		6/18/07	156	WEEKS	2,964.00	19.00				
FOASHL427294	R 100079	100079	LAMP'S GOOD		6/18/07	156	WEEKS	201.24	1.29				
FOASHT681-13	R 100759	100759	LIVINGROOM C/E BETTER		6/18/07	156	WEEKS	400.92	2.57				
100074	ZAUGG, TIMOTHY	101464	101	1	W	1/03/08	12/08/07	26	66.82			REQUESTED PICKUP	0.02-
COMMENT: WILL BE IN \$107.22 by 2/21/08													
MODEL NBR	SERIAL NBR	BAR CODE #	DESCRIPTION		AGMT/CONT#	AGMT/CNT	PERIODS	AGMT/CNT	AMT	PMT	AMT		
CDDELINSP531S	R B9BDDP1	B9BDDP1	COMPUTER DESKTOP BETTER		9/28/07	156	WEEKS	2,808.00	18.00				
102025	ZENO, DANIEL	104235	101	2	W	9/26/08	9/27/08	0	0.00			REQUESTED PICKUP	0.00
COMMENT: WILL BE IN 9/13/08 BY 12:00													
MODEL NBR	SERIAL NBR	BAR CODE #	DESCRIPTION		AGMT/CONT#	AGMT/CNT	PERIODS	AGMT/CNT	AMT	PMT	AMT		
EVTOS37HL67	R M340012722	M340012722	TV LCD 37		3/22/08	156	WEEKS	5,460.00	35.00				
ESLGELHT764	R INWA507761	INWA507761	HOME THEATER BEST		3/22/08	156	WEEKS	1,560.00	10.00				
102890	ZUMBO, CONNIE	106184	101	3	W	7/19/08	7/19/08	0	0.00			REQUESTED PICKUP	0.10-
MODEL NBR	SERIAL NBR	BAR CODE #	DESCRIPTION		AGMT/CONT#	AGMT/CNT	PERIODS	AGMT/CNT	AMT	PMT	AMT		
AOWRLACM082PS	R QCU0602461	QCU0602461	AIR CONDITIONER		6/07/08	156	WEEKS	1,560.00	10.00				
TOTAL TICKETS THIS REPORT: 2579 PAST DUE AMT NOT COLLECTED: 64,864.59 AVG DAYS/MONTHS ON BOOKS: 130 / 4.33													
LAST PAYMENT AMTS: 42,199.28 AGREEMENT AMT: 6,694,579.19 AGREEMENT BAL: 5,879,647.50													
TIME FINISHED:14:42:17													

Figure 17-11 Snapshot of Resulting Store Closed Customer Report in Detail

Print Customers - (3 per page) - CPRT

To produce a detailed report of closed and/or current customers (3 per page), select "Report Menu" off the Store Home Menu, then select "Print Customer Reports" off the Reports Menu, then select "Print Customer With Last 3 Payments", or press the F10 key off of any menu and at the command line, type in "CPRT" and press the enter key. You will be prompted for printer or file pathname. Enter the correct information or press the enter key to accept the default. See [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 17-12.

```

PRINT RENTAL CUSTOMER REPORT (3 PER PAGE)

REPORT ORDER: 1 ACCOUNT TYPE: 1
SELECT BY LOC OR LOC GROUPS: Y
LOCATIONS: 101 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: N
STARTING LAST NAME:
SELECT BY ZIP/PC OR MODEL OR DESC: N

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

Figure 17-12 Print Rental Customer Report (3 per page) Screen

Figure 17-13 is a screen shot of the last page of 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.

Name: YOUNG, PAUL		Acct Nbr:	100037	Store:	101	Salesman:	1	Pmt Amt:	6.38	Run Date:	3/19/10
165 SOUTH ST A		Ticket Nbr:	100134	Acct Mgr:	1	Tax Code:	81	Tax Amt:	0.52	Due Date:	11/14/09
ANYTOWN TX 77777		Agreemnt Nbr:		Cust Type:	L	Agreemnt Type:	A	Grp Amt:	1.00	Last Due:	10/24/09
Home Phone: (555)555-5555		Agreemnt Date:	6/16/07	Pmt Terms:	W	# BOR Items:	ESP	ESP Amt:	0.00	Last Pay:	11/03/09
Work Phone: (555)555-5555		Projection Amt:	0.00	Times Late:	79	Regular Total Due:			7.90		
Comments: WBI \$150.77 by 11/03/09 05:00						Agreemnt Bal:			210.55	Ctrt Amt:	995.28
Model Nbr	Serial Nbr	Desc	Pmt Amt	Model Nbr	Serial Nbr	Desc	Pmt Amt				
FDASHD199000225	100035	DINING ROOM BETTER	6.38								
Pay Date	Due Date	Str	Recpt #	Pmt Amt	ESP	GRP	Tax Amt	Misc Amt	Late Amt	Total Pmt	Balance
10/16/09	10/10/09	101	08010068659	6.38	0.00	1.00	0.52	0.00	3.00	10.90	236.07
10/24/09	10/17/09	101	08010069417	6.38	0.00	1.00	0.52	0.00	3.00	10.90	229.69
11/03/09	10/24/09	101	08010070340	19.14	0.00	1.34	1.43	0.00	3.00	24.91	210.55
Name: YOUNG, PAUL		Acct Nbr:	100037	Store:	101	Salesman:	8022	Pmt Amt:	28.00	Run Date:	3/19/10
165 SOUTH ST A		Ticket Nbr:	102013	Acct Mgr:	1	Tax Code:		Tax Amt:	2.16	Due Date:	11/14/09
ANYTOWN TX 77777		Agreemnt Nbr:		Cust Type:	L	Agreemnt Type:	X	Grp Amt:	2.80	Last Due:	10/24/09
Home Phone: (555)555-5555		Agreemnt Date:	11/23/07	Pmt Terms:	W	# BOR Items:	ESP	ESP Amt:	0.00	Last Pay:	11/03/09
Work Phone: (555)555-5555		Projection Amt:	0.00	Times Late:	63	Regular Total Due:			32.96		
Comments: WBI \$150.77 by 11/03/09 05:00						Agreemnt Bal:			724.00	Ctrt Amt:	3,528.00
Model Nbr	Serial Nbr	Desc	Pmt Amt	Model Nbr	Serial Nbr	Desc	Pmt Amt				
ARKWLEDZGHEXNL	SU231341	REFRIGERATOR BETTER	28.00								
Pay Date	Due Date	Str	Recpt #	Pmt Amt	ESP	GRP	Tax Amt	Misc Amt	Late Amt	Total Pmt	Balance
10/16/09	10/10/09	101	08010068660	28.00	0.00	2.80	2.16	0.00	3.00	35.96	836.00
10/24/09	10/17/09	101	08010069418	28.00	0.00	2.80	2.16	0.00	3.00	35.96	808.00
11/03/09	10/24/09	101	08010070341	84.00	0.00	8.40	6.17	0.00	3.00	101.87	724.00
Name: YOUNG, PAUL		Acct Nbr:	100037	Store:	101	Salesman:	8022	Pmt Amt:	10.00	Run Date:	3/19/10
165 SOUTH ST A		Ticket Nbr:	125821	Acct Mgr:	1	Tax Code:		Tax Amt:	0.77	Due Date:	11/14/09
ANYTOWN TX 77777		Agreemnt Nbr:		Cust Type:	L	Agreemnt Type:	C	Grp Amt:	1.00	Last Due:	10/17/09
Home Phone: (555)555-5555		Agreemnt Date:	8/10/09	Pmt Terms:	W	# BOR Items:	ESP	ESP Amt:	0.00	Last Pay:	11/03/09
Work Phone: (555)555-5555		Projection Amt:	0.00	Times Late:	2	Regular Total Due:			11.77		
Comments: WBI \$150.77 by 11/03/09 05:00						Agreemnt Bal:			382.86	Ctrt Amt:	520.00
Model Nbr	Serial Nbr	Desc	Pmt Amt	Model Nbr	Serial Nbr	Desc	Pmt Amt				
FBASHB190-79/M	104510	BUNKBED GOOD	10.00								
Pay Date	Due Date	Str	Recpt #	Pmt Amt	ESP	GRP	Tax Amt	Misc Amt	Late Amt	Total Pmt	Balance
10/02/09	10/03/09	101	08010067395	10.00	0.00	1.00	0.77	0.00	0.00	11.77	432.86
10/16/09	10/10/09	101	08010068661	10.00	0.00	1.00	0.77	0.00	3.00	14.77	422.86
11/03/09	10/17/09	101	08010070342	40.00	0.00	4.00	3.08	0.00	3.00	50.08	382.86
RUN DATE: 03/19/10		RSSS 12.5		RENTAL CUSTOMERS SEQUENCED BY CUSTOMER NAME		CPRT REPORT		PAGE:		1	
TIME: 14:59:58				CURRENT CUSTOMERS							
		SELECTED BY LOCATIONS: 101		THRU 12/31/79							
		CONTRACT DATES OF:									
		TOTAL TICKETS THIS REPORT: 717		RECEIVABLES: 1035661.19							
		TIME FINISHED: 15:00:03									

Figure 17-13 Print Rental Customer Report (3 per page) Example

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 March 2020, you would enter 03/01/10 and 03/31/10. 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 March 2004, you would enter 03/01/10 and 03/31/10. 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 March 2010, you would enter 03/01/10 and 03/31/10. 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 March 2010, you would enter 03/01/10 and 03/31/10. 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 rental customers and is asking for a projection figure at the end of the report for store 101, see Figure 17-14.

```

PRINT RENTAL CUSTOMER REPORT (3 PER PAGE)

REPORT ORDER: 1 ACCOUNT TYPE: 1
SELECT BY LOC OR LOC GROUPS: Y
LOCATIONS: 101 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/PC OR MODEL OR DESC: N

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

Figure 17-14 Print Rental Customer Report (3 per page) Screen with data

The resulting report will print 3 customers per page for the customer rental 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 17-15.

Name: YOUNG, PAUL													Acct Nbr:	100037	Store:	101	Salesman:	1	Pmt Amt:	6.38	Run Date:	3/19/10
165 SOUTH ST A													Ticket Nbr:	100134	Acct Mgr:	1	Tax Code:	81	Tax Amt:	0.52	Due Date:	11/14/09
ANYTOWN TX 77777													Agreement Nbr:		Cust Type:	L	Agreement Type:	A	Grp Amt:	1.00	Last Due:	10/24/09
Home Phone: (555)555-5555													Agreement Date:	6/16/07	Pmt Terms:	W	# BOR Items:		ESP Amt:	0.00	Last Pay:	11/03/09
Work Phone: (555)555-5555													Projection Amt:	27.63	Times Late:	79	Regular Total Due:		7.90			
Comments: WBI \$150.77 by 11/03/09 05:00													Agreement Bal:						210.55	Ctrt Amt:	995.28	
Model Nbr	Serial Nbr	Desc	Pmt Amt	Model Nbr	Serial Nbr	Desc	Pmt Amt															
FDASHD199000225	100035	DINING ROOM BETTER	6.38																			
Pay Date	Due Date	Str	Receipt #	Pmt Amt	ESP	GRP	Tax Amt	Misc Amt	Late Amt	Total Pmt	Balance	Pmt Type	Salesman									
10/16/09	10/10/09	101	08010068659	6.38	0.00	1.00	0.52	0.00	3.00	10.90	236.07	REGULAR	8017									
10/24/09	10/17/09	101	08010069417	6.38	0.00	1.00	0.52	0.00	3.00	10.90	229.69	REGULAR	8017									
11/03/09	10/24/09	101	08010070340	19.14	0.00	1.34	1.43	0.00	3.00	24.91	210.55	REGULAR	8105									
Name: YOUNG, PAUL													Acct Nbr:	100037	Store:	101	Salesman:	8022	Pmt Amt:	28.00	Run Date:	3/19/10
165 SOUTH ST A													Ticket Nbr:	102013	Acct Mgr:	1	Tax Code:		Tax Amt:	2.16	Due Date:	11/14/09
ANYTOWN TX 77777													Agreement Nbr:		Cust Type:	L	Agreement Type:	X	Grp Amt:	2.80	Last Due:	10/24/09
Home Phone: (555)555-5555													Agreement Date:	11/23/07	Pmt Terms:	W	# BOR Items:		ESP Amt:	0.00	Last Pay:	11/03/09
Work Phone: (555)555-5555													Projection Amt:	121.24	Times Late:	63	Regular Total Due:		32.96			
Comments: WBI \$150.77 by 11/03/09 05:00													Agreement Bal:						724.00	Ctrt Amt:	3,528.00	
Model Nbr	Serial Nbr	Desc	Pmt Amt	Model Nbr	Serial Nbr	Desc	Pmt Amt															
ARWRLED2GHEXNL	SU2531341	REFRIGERATOR BETTER	28.00																			
Pay Date	Due Date	Str	Receipt #	Pmt Amt	ESP	GRP	Tax Amt	Misc Amt	Late Amt	Total Pmt	Balance	Pmt Type	Salesman									
10/16/09	10/10/09	101	08010068660	28.00	0.00	2.80	2.16	0.00	3.00	35.96	836.00	REGULAR	8017									
10/24/09	10/17/09	101	08010069418	28.00	0.00	2.80	2.16	0.00	3.00	35.96	808.00	REGULAR	8017									
11/03/09	10/24/09	101	08010070341	84.00	0.00	8.40	6.47	0.00	3.00	101.87	724.00	REGULAR	8105									
Name: YOUNG, PAUL													Acct Nbr:	100037	Store:	101	Salesman:	8022	Pmt Amt:	10.00	Run Date:	3/19/10
165 SOUTH ST A													Ticket Nbr:	125821	Acct Mgr:	1	Tax Code:		Tax Amt:	0.77	Due Date:	11/14/09
ANYTOWN TX 77777													Agreement Nbr:		Cust Type:	L	Agreement Type:	C	Grp Amt:	1.00	Last Due:	10/17/09
Home Phone: (555)555-5555													Agreement Date:	8/10/09	Pmt Terms:	W	# BOR Items:		ESP Amt:	0.00	Last Pay:	11/03/09
Work Phone: (555)555-5555													Projection Amt:	43.30	Times Late:	2	Regular Total Due:		11.77			
Comments: WBI \$150.77 by 11/03/09 05:00													Agreement Bal:						382.86	Ctrt Amt:	520.00	
Model Nbr	Serial Nbr	Desc	Pmt Amt	Model Nbr	Serial Nbr	Desc	Pmt Amt															
FBASHB190-79/M	104510	BUNKBED GOOD	10.00																			
Pay Date	Due Date	Str	Receipt #	Pmt Amt	ESP	GRP	Tax Amt	Misc Amt	Late Amt	Total Pmt	Balance	Pmt Type	Salesman									
10/02/09	10/03/09	101	08010067395	10.00	0.00	1.00	0.77	0.00	0.00	11.77	432.86	REGULAR	80110									
10/16/09	10/10/09	101	08010068661	10.00	0.00	1.00	0.77	0.00	3.00	14.77	422.86	REGULAR	8017									
11/03/09	10/17/09	101	08010070342	40.00	0.00	4.00	3.08	0.00	3.00	50.08	382.86	REGULAR	8105									
RUN DATE: 03/19/10													RSSS 12.5			CPRT REPORT PAGE: 1						
TIME: 15:32:23													RENTAL CUSTOMERS SEQUENCED BY CUSTOMER NAME						CURRENT CUSTOMERS			
SELECTED BY LOCATIONS: 101													CONTRACT DATES OF: THRU 12/31/79						PROJECTION FACTOR: 4.33			
TOTAL TICKETS THIS REPORT: 717													RECEIVABLES: 1035661.19			PROJECTION AMOUNT: 57494.07						
TIME FINISHED: 15:32:25																						

Figure 17-15 Print Rental Customers Screen Shot of Resulting Report