

Reports

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Customer List Menu

- **Customer List** – This gives the ability to print a customer list based on *Customer Type, Delivery Type, or Price Code*.
- **Complete Information** – Everything entered on the *Customer* screen displays for all customers.
- **Customer Report** – Print all customer and tank information.
- **Inactive List** – This lists all customers with an *Inactive* status.
- **Count by Tank Type** – List customers by Tank Type.

Customer \$ Menu

- **Collection** – List customers over a specified amount (i.e., 30, 60, 90, etc.)
- **Credit Balance** – List customers with credit balances.
- **Totals/# of Customers** – This is used on a daily basis and at month-end to track total sales.
- **Age Analysis by Date** – This can be used to find out A/R on a certain date and in balancing on a daily or monthly basis.

Data Export

Export files to either an ASCII format, bring the information into Excel or other software for data sorting and analysis.

- 1 Customer Information
- 2 History Information
- 3 Collection Information
- 4 Customer/Meter Information
- 5 Tank Information
- 6 Credit Information
- 7 Customer Email Information

Contract Gas

These reports assist in determining the status of customers' contracts, how much gas to purchase for forecasting purposes, etc.

Note: When using the Excel output option, the Contract Gas report # 3 (Contract Total Dollars/Gallons) allows for assigning a file name and selecting a location to save the file. This allows multiple users to run the report without having to wait for the report to be closed.

Payment Arrangement Report

This report shows customers with payment arrangements to help track this information.

Budget Report

This report tracks customers on budgets to ensure they are staying within their budget limits. See [Year End](#) for more information.

Tank/Meter Inventory

This report menu, found at *Main Menu / Tank/Meter Inventory Menu / Report Menu*, gives the ability to track tank status. The *Report Descriptions* help determine what report to run.

1 Tank Inventory Status

2 Meter Inventory Status

3 T/M Possible Recall List

4 T/M Tank History

5 T/M Meter History

6 Tank Purchased Price

7 Underground Tank Listing

8 T/M Tank Switchout History

Division ABC COMPANY

Status (Everything, In, Out, Sold, Not In Service, At Customer, Destroyed, Lost/Stolen)

Tank Type PROPANE

Location (0 for All)

Detail

Summary

Video

Printer

Excel

Use Default Printer

Prompt for Printer

Report Descriptions

This report lists tanks by inventory status. The detailed report will list each tank by status code with totals by status code, the summary will list totals by status code.

Management

Go to *Main Menu / Management Reports*. There are various reports listed within this menu.

- **Management Reports** – Efficiency reports pertaining to drivers, gallons, call-ins, etc. are available here.
- **Automated Reports** – This area gives the ability to set up a template so information does not have to be reselected each time it is run.
- **Exception Report Menu** – This menu displays exceptions made by the driver at the time of delivery such as price changes, product changes, etc. The menu also provides missing trip information and geo-code changes greater than 0.25 miles. A *General Process Exception* error report can also run from this menu including RTM imports, Tank maintenance, additional data on Timeout Period Exceeded exceptions, and Master Clear.
 - **General Process Exceptions** – Lists *Type, Error, DateTime, Full Exception* and checkbox to mark as *Reviewed*. Any errors will be recorded and the process will continue on without pausing.
- **Forecasting Reports** – Enter information to determine gallons to purchase from the terminal.
- **Optimizer Report Menu** – This houses all of the Optimizer compliancy reports for managerial review.

Salesman Reports

Go to *Main Menu / Salesman Reports*.

- **Salesman Customer List** – This report shows a Customer list by Salesman.
- **Salesman Total Gallons** – This report gives a breakdown of all deliveries per Salesman with Total Gallons. Detail and Summary versions open in Excel and show all sales.