Reports

Last Modified on 07/17/2025 3:37 pm EDT

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.

Customer Information History Information Collection Information

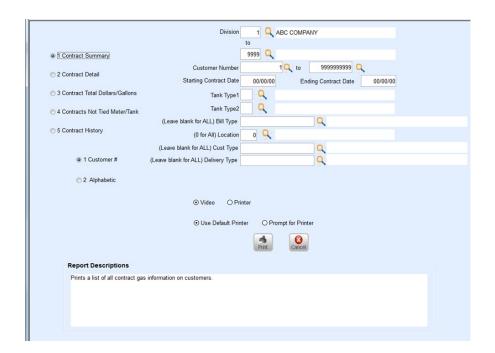
4 Customer/Meter Information

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

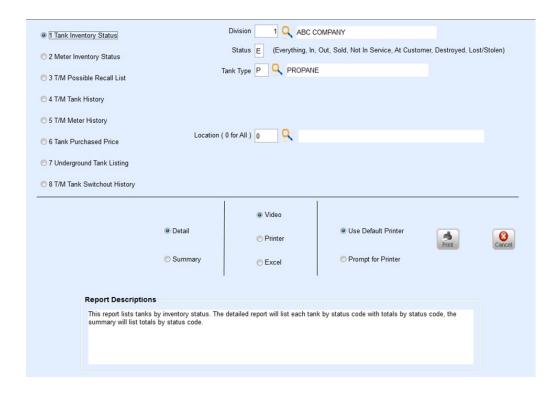
This report shows customers with payment arrangements to help track this information.

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.



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, and Master Clear.
- 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.