

# 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 )

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- 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.
- **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.