



Customer History Reports

Manage and Monitor Your Customers' Purchasing History.

Print a Report Containing:

- Items Purchased by a Customer Page 3
- Customers who have Purchased an Item Page 4
- Customers who have Purchased from a Vendor Page 5
- Customers who have Returned Items.....Page 6
- Customer Comparative Report..... Page 7
- Customer Profile Label Print.....Page 8

Customer History Report

- Report Customer Purchases in individual **Transaction Detail** or a **Customer Totals Summary**.
- List Customers who have purchased from a particular **Vendor**, within a certain **Department** or **Class**, or a particular **Item**.
- Print out a particular **Customer's Purchases** or **Returns** or both.
- Print out purchases made by a Customer(s) at a particular **Location** or from a particular **Salesman**.
- Limit the reported purchases to a particular **Date Range**.
- The Customer History Report includes **Discounts** given.
- Include or omit **Cost Information**.
- Compare Customer Purchasing during any **Two Date Ranges** on the **Customer Comparative Report**.

Customer History Report

Run Date 7/07/03
Run Time 11:09 AM

CUSTOMER HISTORY REPORT Merchant Technologies

Objective:

- 1 Print a report listing the Items a particular Customer has purchased.
- 2 Include only Items purchased during June and so far in July, 2003.
- 3 Include Cost and Margin Data.
- 4 Include Purchase Dates.

[SELECT OPTIONS] **1** Sort Order (1-4)? 1 <1>=Cust/Itm <2>=Cust/Employ/Itm<3>=Cust Typ/
Customer Code: 01R2000009 JANELLE KINNEY
 Location Code: ALL All Locations
 Vendor Code: ALL All Vendors
 Department Code: ALL All Departments
 Class Code: ALL All Classes
 Category Code: ALL All Categories
 Item Code: ALL All Items
 Salesman Code: ALL All Salesman
 Sales Order Type: ALL All Sales Order Types
 Customer Types: ALL
2 Ship Date: 6/01/03 to 7/07/03
 No Purchases Since: Prints customers that have not Purchased since this date, <Blank>=All
Print Detail (1-5)? 5 <1>=Locate Totals <2>=Cust Totals<3>=Consol Item<4>=Item Detail <5>=Sub Items
 Sort Order (C/N)? C <C>=Sort by Customer Code, <N>=Sort by Name
3 Print Cost/Profit\$ (Y/N)? Y
 Additional Data (1-3)? 1 <1>=No Additional Data, <2>=Print Phone#, <3>=Print Bill to Address
 One Cust Per Page (Y/N)? N
 Consolidate Locate (Y/N)? Y
 Returns Only (Y/N)? N

Item Code	Vendor Reference	Item Description	Ship Date	Order Number	Units Sold	Gross Price	Disc	Net Price	Extend Price	Extend Cost	Extend Marg
Customer: 01R2000009 JANELLE KINNEY			4							3	
0004910000	5343637846	A TALE OF TWO CITIES	6/16/03	76-03	1	7.49	24%	5.62	5.62	3.75	33%
0006270000	987610245	THE GREAT GATSBY	6/16/03	76-03	1	6.95	25%	5.21	5.21	3.50	32%
0006410027	527 BC	LEVI'S 527 LOW RISE BOOT CUT <BLUE 32 32 >	6/08/03	233-01	1	37.95		37.95	37.95	17.00	55%
0007060002	IP 211	IZOD MADRAS PRINT POLO <BLUE SMALL >	6/08/03	233-01	1	29.99		29.99	29.99	14.50	51%
0007060007	IP 211	<GREEN SMALL >	7/02/03	356-04	1	29.99	15%	25.49	25.49	14.50	43%
0007320002	IP 208	NAILHEAD JACQUARD POLO <RED SMALL >	6/08/03	233-01	1	31.95		31.95	31.95	15.00	53%
0007320007	IP 208	<GREEN SMALL >	7/02/03	356-04	1	31.95	15%	27.15	27.15	15.00	45%
TOTAL Item Code:					6		8%		59.10	83.25	49%
TOTAL Customer:					6		7%		163.36	83.25	49%
TOTAL Company:					6		7%		163.36	83.25	49%

The Order Number column contains the Sales Order Number, or, as in these POS examples, the Transaction and Register Numbers.

Customer History Report

NOTE: Most of the Selection Options have been omitted from this page. The complete Selection Options are shown on page 1.3

CUSTOMER HISTORY REPORT Merchant Technologies

Objective:

- 1 Print a report listing the Customers who have purchased a particular Item.
- 2 Include Sales Dates, Pricing and Discount information.

1

Customer Code:
Item Code:
Ship Date:
Print Detail (1-5)?

1 <1>=Cust/Itm <2>=Cust/Employ/Itm <3>=Cust Typ/Cu
ALL
000732 NAILHEAD JACQUARD POLO
6/15/03 to 7/08/03
5 <1>=Locate Totals <2>=Cust Totals <3>=Consol Itm

Item Code	Vendor Reference	Item Description	Ship Date	Order Number	Units Sold	Gross Price	Disc	Net Price	Extend Price	Extend Cost	Extend Marg
Customer: 01R0000012 WIBERG, ROB											
0007320003	IP 208	NAILHEAD JACQUARD POLO <RED LARGE	> 6/26/03	105-15	1	31.95	--	31.95	31.95	15.00	53%
TOTAL Customer:					1		0%		31.95	15.00	53%
Customer: 01R2000006 STEPHENS, JOE											
0007320010	IP 208	NAILHEAD JACQUARD POLO <GREEN XXL	> 7/06/03	32-14	1	31.95	--	31.95	31.95	15.00	53%
TOTAL Customer:					1		0%		31.95	15.00	53%
Customer: 01R2000009 KINNEY, JANELLE											
0007320002	IP 208	NAILHEAD JACQUARD POLO <RED MEDIUM	> 6/30/03	114-15	1	31.95	--	31.95	31.95	15.00	53%
0007320007	IP 208	NAILHEAD JACQUARD POLO <GREEN MEDIUM	> 6/30/03	114-15	1	31.95	--	31.95	31.95	15.00	53%
TOTAL Item Code:					2		0%		63.90	30.00	53%
TOTAL Customer:					2		0%		63.90	30.00	53%
Customer: 01R0000546 MOLOGHNEY, SHANNON											
0007320005	IP 208	NAILHEAD JACQUARD POLO <RED XXL	> 6/19/03	90-15	1	31.95	--	31.95	31.95	15.00	53%
TOTAL Customer:					1		0%		31.95	15.00	53%
Customer: SOMERHS SOMERVILLE HIGH SCHOOL											
0007320004	IP 208	NAILHEAD JACQUARD POLO <RED LARGE	> 7/07/03	13153	8	31.95	15%	27.16	217.28	120.00	45%
0007320002	IP 208	NAILHEAD JACQUARD POLO <RED MEDIUM	> 7/07/03	13153	9	31.95	15%	27.16	244.44	135.00	45%
TOTAL Item Code:					17		15%		461.72	255.00	45%
TOTAL Customer:					17		15%		461.72	255.00	45%
TOTAL Company:					22		12%		621.47	330.00	47%

This report points out not only who is buying an item, but also what they paid for it. Here, an institutional customer who made a large purchase was given a discount.

Customer History Report

Run Date 7/07/03
Run Time 4:26 PM

CUSTOMER HISTORY REPORT Merchant Technologies

Objective:

- 1 Print a report listing showing Customer Totals for Companies and Employees under their hierarchy.
- 2 Include Customers with purchases to date in 2003.
- 3 Include Cost, Margin and Discount information.

[SELECT OPTION] 1 **Sort Order (1-4)?** 2 <1>=Cust/Itm <2>=Cust/Employ/Itm <3>=Cust Typ
Customer Code: ALL
Location Code: 01 **MERCHANT TECHNOLOGIES**
...
Customer Types: ALL
Ship Date: 1/01/03 to 6/30/03 2
No Purchases Since: ALL Prints customers that have not Purchased
1 **Print Detail (1-5)?** 2 <1>=Locate Totals <2>=Cust Totals <3>=Consol
Sort Order (C/N)? C <C>=Sort by Customer Code, <N>=Sort by Name
Print Cost/Profit\$ (Y/N)? Y
...

NOTE: Most of the Selection Options have been omitted from this page. The complete Selection Options are shown on page 1.3

Location: 01 MERCHANT TECHNOLOGIES

Item Code	Vendor Reference	Item Description	Ship Date	Order Number	Units Sold	Gross Price	Disc	Net Price	Extend Price	Extend Cost	Extend Marg
Customer: AA01 AA UNIFORM, INC.											
1	01R0000004	SMITH, LOUIE,			7		10%		257.40	141.50	45%
	01R2000010	MAYNOR, THERESA,			6		10%		266.40	146.50	45%
	HICKEYERIN	HICKEY, ERIN,			11		10%		382.20	210.21	45%
					---		---		---	---	---
					24		10%		905.86	498.21	45%
Customer: MAC01 MAC THE ICE MAN											
1	01B0000236	PETRONGOLO, MARK			10		15%		225.25	127.20	43%
	01R0001002	WITZ, JOE			8		15%		180.20	101.76	43%
	01R0001012	MULLOWNEY, TIM			12		15%		276.42	156.10	43%
	01R0001201	MAC ANNENEY, TOM			7		15%		157.68	89.04	43%
					---		---		---	---	---
					37		15%		839.55	474.10	43%
Customer: SOMERHS SOMERVILLE HIGH SCHOOL											
1	01B0000029	ROBINSON, ROSS,			6		6%		205.76	104.00	49%
	01B0000133	LUCICH, DREW,			5		6%		172.86	87.00	49%
	01B0000451	WISCHHUSEN, BOB,			6		6%		200.12	102.00	49%
					---		---		---	---	---
					17		6%		578.74	293.00	49%
TOTAL Location:					78		12%		2324.15	1265.31	45%

This report demonstrates how customers can be linked to other customers. Typically this is done to link Employees to the Company they work for.

Customer History Report

Run Date 7/08/03
Run Time 3:43 PM

CUSTOMER HISTORY REPORT Merchant Technologies

[SELECT OPTIONS] Sort Order (1-4)? 1 <1>=Cust/Itm <2>=Cust/Employ/Itm <3>=Cust Typ
Customer Code: ALL
Location Code: 01 Merchant Technologies
Vendor Code: ALL All Vendors
Department Code: ALL All Departments
Class Code: ALL All Classes
Category Code: ALL All Categories
Item Code: ALL All Items
Salesman Code: ALL All Salesman
Sales Order Type: ALL All Sales Order Types
Customer Types: ALL
Ship Date: 5/01/03 to 7/08/03
No Purchases Since: Prints customers that have not Purchased since this date, <Blank>=All
2 Print Detail (1-5)? 2 <1>=Locate Totals <2>=Cust Totals <3>=Consol Item <4>=Item Detail <5>=Sub Items
Sort Order (C/N)? C <C>=Sort by Customer Code, <N>=Sort by Name
Print Cost/Profit\$ (Y/N)? Y
Additional Data (1-3)? 1 <1>=No Additional Data, <2>=Print Phone#, <3>=Print Bill to Address
1 Consolidate Locate (Y/N)? N
1 Returns Only (Y/N)? Y

Location: 01 MERCHANT TECHNOLOGIES

Item Code	Vendor Reference	Item Description	Ship Date	Order Number	Units Sold	Gross Price	Disc	Net Price	Extend Price	Extend Cost	Extend Marg
01R0000008		COLLINS, DIANNE			3-		5%		74.10-	37.50-	49%
01R0000412		LUCICH, DREW			13-		0%		351.00-	175.50-	50%
01R0001106		HICKEY, ERIN			2-		0%		50.00-	25.40-	49%
01R0001887		STEPHENS, R.C.			1-		20%		24.80-	15.00-	40%
01R0002748		MOLOUGHNEY, SHANNON			12-		9%		316.68-	168.00-	47%
01R0003801		DAME, MARTHA			1-		10%		37.80-	20.20-	47%
01R0004881		CONSOLO, LINDA			10-		15%		263.50-	150.00-	43%
01R0005204		GRAB, ROBIN			2-		0%		66.00-	32.00-	52%
01R0006012		WELLS, DAWN			2-		0%		54.00-	28.00-	48%
TOTAL Location:					46-		10%		1237.88-	651.60-	47%

The Returns Only format of the Customer History report will point out customers who have a tendency to return items, possibly abusing your policies.

Objective:

- Print a report showing customers who have returned items in the last 2 months.
- Summarize returns by customer, showing total Units and Dollars.
- Include Cost, Margin and Discount information.

Customer Comparative Report

Run Date 7/02/03
Run Time 11:43 AM

CUSTOMER COMPARATIVE REPORT Merchant Technologies

Page 1
User JW

[SELECT OPTIONS] **Sort (1/2/3/4/5)?** 2 4 <1>=Customer, <2>=Salesman/Cust, <3>=Type/Cust, <4>=Net Profit, <5>=Zip Code
Customer Code: ALL
Location Code: 01
Salesman Code: ALL
Customer Type: ALL
Sales Period 1 (mmyy): 1/03 to 6/03
Sales Period 2 (mmyy): 1/02 to 6/02

Sort the Customer Comparative Report by Margin Dollars to find out who your best customers are.

Objective:

- Print a report comparing Customer purchases during the first 6 months of 2003 to the first 6 months of 2002.
- Sort the Customers on the report by 2003 Sales Dollars..

Customer Code	Customer Name	Zip Code	Sls Cod	Cust Type	-- 01/03 to 06/03 --			-- 01/02 to 06/02 --			Net Profit Change
					Sales Units	Sales \$	Mrg %	Sales Units	Sales \$	Mrg %	
ROBERTS	RC STEPHENS	28403	GS	CD	87	2891	46%	84	2775	44%	4%
01B0000015	KEITH ALLEN	28403	FZ	GOLF	67	2473	51%	60	2226	48%	11%
01R0001013	DREW ROONEY	28465	JQL		82	2457	48%	84	2531	49%	-3%
LEE	LEE'S GARAGE	28546	JW	GARG	49	2118	52%	42	1821	45%	16%
01R0001012	SHANNON MOLOGHNEY	28451	AC		58	1948	50%	55	1831	47%	6%
01R0002945	BETH BUTRIM	28458	FZ		47	1851	51%	47	1870	52%	-1%
01R0001015	YMCA STAFF	28544	JQL		60	1911	49%	65	2064	53%	-7%
LITTLELEAGUE	SOMERVILLE LITTLE LEAGUE	28403	GS	SPRT	88	2184	42%	86	2140	41%	2%
SUBURBAN	SUBURBAN PROPANE CO.	28403	JW	PROP	48	1487	48%	36	1100	36%	35%
01R0001016	MARILYN HUELSMAN	28463	JQL		47	1471	49%	49	1545	51%	-5%
ANDREWS	MICHAEL ANDREWS	28541	AC	CITZ	53	1548	42%	54	1579	43%	-2%
01B0000016	ERIN HICKEY	28546	BBB	CITZ	44	1354	44%	44	1340	44%	1%
4SEASONS	FOUR SEASONS SCHOOL	54556	JQL	OIL	24	840	51%	20	697	42%	20%
HEADSTART	HEADSTART PROGRAM	28456	JQL	SCHO	33	659	39%	30	606	36%	9%
01R0001022	SOMERVILLE HIGH SCHOOL	02150	GS		15	576	42%	15	576	42%	0%
01R0001021	FRED MONSOR	02165	GS	SCT	11	451	51%	12	478	54%	-6%
01R0001031	JANELLE KINNEY	02222	FZ		13	357	49%	10	264	36%	35%
01R0001020	VICKI KRONENGOLD	28403	GS		6	215	50%	6	209	49%	3%
MACICE	MAC THE ICEMAN	02135	AC		4	192	54%	4	211	59%	-9%
01R0001026	DOUG MCPHAIL	89028	BBB		4	189	51%	3	129	35%	47%
01R0001019	ROSS ROBINSON	02158	AC		3	105	50%	3	108	52%	-3%
01R0001033	MIKE GREENWELL	28940	JQL		3	96	50%	3	97	51%	-1%
01R0001035	BILL SMITH	28444	GS		3	90	52%	3	79	46%	14%
01R0001036	KEVIN STEPHENS	19043	FZ		4	79	48%	3	66	40%	20%
01R0001029	MARY SMITH	02323	AC		1	48	54%	1	43	49%	11%
TOTAL Report:					856	27619	48%	818	26386	46%	5%

Customer Profile Label Print

Select

PROFILE LABEL PRINT

The **Customer Profile Label Print** screen allows Mailing Labels to be printed for all Customers who match the criteria defined in the select options.

- | | | | |
|-------------------------|---------|--------------------------------|---|
| 1. Location Code: | 01 | [MERCHANTTECHN | |
| 2. Vendor Code: | ALL | [All Vendors |] |
| 3. Department Code: | AL | [All Departments |] |
| 4. Class Code: | AL | [All Classes |] |
| 5. Item Code: | ALL | [All Items |] |
| 6. Customer Type: | ALL | [All Customer Types |] |
| 7. Customer Type: | ALL | [All Customer Types |] |
| 8. Customer Type: | ALL | [All Customer Types |] |
| 9. Customer Form Code: | ALL | [All Customer Forms |] |
| 10. Salesman Code: | ALL | [All Salesman |] |
| 11. Birthday Month(mm): | AL | 19. Sort Order (1/2)? | 1 |
| 12. Birthday Age: | AL | 20. Label Type (1/2/3)? | 2 |
| 13. Beg Zip Code:: | ALL | 21. Print Customer Code? | N |
| 14. End Zip Code: | | 22. Print Sales \$ (Y/N)? | N |
| 15. Beg Sales Date: | 1/01/03 | 23. No Purchases Since: | |
| 16. End Sales Date: | 7/14/03 | 24. Include/Exclude Type: | 1 |
| 17. Beg Sales \$: | 100 | 25. Export Data (1/2/3): | 3 |
| 18. End Sales \$: | 999999 | 26. Generate Count Only (Y/N)? | N |

The **Export Data** field allows you to print the labels on standard Label Media, export to an ASCII file, or export the ASCII file directly to a diskette or CD.

Enter This screen will generate labels for all customers who have **spent at least \$100 so far in 2003.**

<Esc>=Quit