

RepTime Customer Reports

Report Name + Description + By Date + Filter by Criteria

Report Name	Description	Date	Cus	Mfg	Rep	Zip	OCs	Div	Ssn
All Customers List, Labels, Category	This report will create a one line detailed customer list that you can export into Excel for mass mailers or other purposes. You can also create mailing labels from this report. <i>**Perfect for running all customers for a single MFG with or without order totals, to know who has not ordered a certain line.</i> <i>** This report can also be run by category or zip code to narrow down results.</i>		✓	✓	✓	✓		✓	
Customer Call Sheet	This report is perfect for running a "Call Report" or "Pre-Market Report" to have printed and ready for appointments with your Customers. It provides ample room for note taking before, during, or after your appointment and you can filter by all customers, or only a select few in a certain city or zip code range.	✓	✓	✓	✓	✓			
All Customers by Salesperson with Manufacturers	This report will create a list of customers and offer the name of each line they ordered split by Salesperson. <i>**Helpful to just know which lines the customer buys. No totals given.</i>		✓		✓	✓			
Customer Contact Report	This report will create a simple list of customers and their next and last contact dates. It links with the Contact Info under each Customer Maintenance Screen. The dates there reflect this report on showing which customers you need to contact. This report is also split by Salesperson.	✓			✓				
Customer Count By Mfgs and Reps	This report will create a list of total number of customers that ordered with a particular manufacturer. The report is split by salespeople to check how popular each MFG is.	✓		✓	✓				
Customer Count Zip, Postal Codes by Rep Assigned	This report will create a list to show how many customers are assigned to particular reps. It will also offer an option to show all Zip Codes that are assigned to the rep to know their territory information.				✓				
Customer Defined Ranking Combined	This report will create a list of customers who can be ranked in groups or brackets. You can create up to 4 groups or brackets of customers based off of their total sales. For example, you can group your best-selling customers in Group A who have purchased over \$100,000 worth of product, Group B who have purchased between \$50,000-\$99,000 worth of product, Group C who have purchased between \$10,000-\$49,000 worth of product, and Group D who have purchased between \$0-\$9,999 worth of product. You can filter this by all or selected Manufacturers, Salespersons, or Zip Codes of Customers. <i>** Perfect for knowing how your customers will spend</i>	✓		✓	✓	✓		✓	
Customer Direct Orders	This report will create a simple list of customers who have ordered ONLY Direct orders and not any other order code such as Road, Phone, Show, etc.	✓			✓	✓			

Customer Item Sales	<p>This report will show all the items that a customer has purchased split down by each manufacturer to help see highest item sellers and frequency. You can also Run this report by a specific Item Number to find the frequency of the item appearing on purchase orders throughout your sales history and group them accordingly.</p> <p>**Also run combined customers per MFG **Run a list of All the Customers that have purchased a Single item.</p>	✓	✓	✓	✓	✓		✓	
Customer List, Ranking, Labels, Category, Seasonal by Orders	<p>This report will create numerous other reports to help collect valuable data. The report has options to rank your customers in multiple ways, like what lines were ordered years before and not in the current year, and see grand totals for each line and how they did with the customer.</p> <p>**Print mailing labels and simple one line listing of customers. **This report can only be run by the FULL year range. Suggest to always select the entire current year before running report. This helps to get totals for the previous 2 years.</p>	✓	✓	✓	✓	✓	✓	✓	✓
Customers – No Salesperson Assigned/Inactive	<p>This report will create a list of customers with No Salesperson Assigned to them. You can also include Inactive customers to help see which reps are not assigned to them.</p>	✓				✓			
New Accounts by Salesperson/Leads, Label, File	<p>This report will create a list of all NEW Accounts that have been added between the date ranges given.</p> <p>This report will also create a Leads report to show ALL customers that have NO orders placed during the date range given.</p> <p>**This report is helpful to know all of your new leads and to target just them to place orders for the first time. **Includes Notes and also able to print out Mailing Labels for leads.</p>	✓			✓	✓			

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RepTime Manufacturers Reports

Report Name + Description + By Date + Filter By Criteria

Report Name	Description	Date	Cus	Mfg	Rep	Zip	OCs	Div	Ssn
Blank Credit Form	This is just a simple blank credit application form to print and fill out for customer's credit history information.								
Calculated Commissions	This report will compare the standard commission rate with the actual commission rate posted on the orders and offer the percent difference in all posted commissions.			✓					
Commissions Outstanding	This report will create a list of all orders that have been invoiced but not yet commissioned. You can track by Invoice number to determine PO. **You can also include/exclude to seeing all outstanding amounts.	✓	✓	✓	✓			✓	
Each Order Written/Invoices Applied	This report will create a list of all orders written split by Manufacturer. **You can also run to see all orders that have Invoices Applied. **Optional to select Confirmed Orders, Quotes/HFC, or Samples.	✓		✓	✓		✓	✓	✓
Input Summary	This report will create an input summary report to know which user has entered orders for a particular time period. Helps to know what data users are entering. **Perfect for knowing what employees are inputting in the system. **Run Summary to know number of Orders, Invoices, and Chargebacks posted.	✓							
Item Sales	This report will create an item list for each manufacturer to know how their item sales are going by qty sold, % sold, total sold, and frequency.	✓		✓	✓	✓	✓	✓	
Manufacturer List	Report will list vendor(s) and their detailed information which is selected. (Addresses, phone numbers, emails, contacts, comments, assigned reps)			✓				✓	
Manufacturer Order Totals	This report will create list of all manufacturers and the grand order total they have for the given date range. Report will be sorted by the mfg with highest total for orders. ** Perfect for managers to run this report during trade shows to see sales totals. Includes average order and # of Orders.	✓		✓	✓		✓	✓	✓
Manufacturer Sales Comparison	This report will create a breakdown by order codes of all the manufactures and how they compare with sales amongst their order codes.	✓		✓	✓	✓	✓	✓	
MFG Mailing Labels	Print mailing labels for selected manufacturers with their contact information on the label.			✓					
MFG Special Offers	This will allow the user to print out a list of active Manufacturer Special Offers. You can do this for all Manufacturers or just select Manufacturers.			✓					
Order Codes Report	This will create a report by manufacturer for all the order codes written in the date range, along with number of new accounts added and sales totals for each order code to see the differences in where sales are coming from for each manufacturer. ** Helpful to know what areas of your business is bringing in the most	✓		✓	✓		✓	✓	

	<p>sales.</p> <p>**Also get the ranking of manufacturers and salespersons that did the highest sales at the end of the report.</p>								
Order Summary with Terms and Credit Card Info	This report will show you all customers orders split by Manufacturer with the order information and payment terms information.	✓		✓	✓		✓	✓	
Order/Ship/Cancel Date Report	<p>This will create a detailed report of all orders placed between the date ranges you specify. Invoices and outstanding amounts will also be posted along with all dates, PO#s and INV#s.</p> <p>**Very helpful report for running company sales and needing to export into Excel.</p>	✓	✓	✓	✓	✓	✓	✓	✓
Orders Outstanding	<p>This report will show all orders that have NO invoices posted. You can also run orders to find Invoices that have been posted for a different amount.</p> <p>**This report does not reflect commissions outstanding.</p>	✓	✓	✓	✓			✓	✓
Outstanding Orders and Commissions	<p>This report will show all the orders that are in the system that have not been invoiced or commissioned. Even orders that have a PARTIAL invoice amount remaining could appear in this report. You will see what the Order Total is with the amount of invoice you have not yet received and how much commission you should be making for that invoice.</p> <p>**This is helpful to find all orders that your manufacturer should be paying you on depending on what you have submitted to them.</p>	✓	✓	✓	✓		✓		
Print Line Item Orders/Quotes	<p>This report will actually let you print number orders within a date range or by tagging. This feature allows you to print mass order copies of selected orders rather than having to go through order entry to print several orders 1-by-1.</p> <p>**This is helpful if you want to extract several orders into PDF format for any particular reason.</p>								
Print Product List/ Labels	This feature will help you create barcode labels for all the items in the showroom or even print out a full catalog book of the items to take on the road.			✓					
Shipping Percentage	This report will calculate the difference between the total amount of orders placed along with the total amount invoiced. These figures will be the "shipping percentage" of all of your orders.	✓		✓				✓	✓
Two Year Sales Comparison	<p>This report will compare two sales periods left and right to show how each manufactures sales OR salespersons sales are going for that period.</p> <p>**Very helpful report to run for knowing how company sales are progressing from previous year.</p>	✓		✓	✓	✓	✓	✓	✓
UnderPayments Report	This report will give all the commissions that have been underpaid to the salesperson due to some particular reasoning during the invoice and commission entry process.	✓	✓	✓					

Salesperson List	This report will create a contact information list for all ACTIVE sales reps in the company. It will also have an option to show the customers that are assigned to the reps.				✓				
Salesperson Mailing Labels	This report will create mailing labels for all of the active sales reps in the company or user can select a specific sales rep.				✓				
Salespersons Sales by Customer (4)	<p>This report will create four other reports that will offer Year To Date (YTD) sales on each customer compared to their sales history for the previous year.</p> <p>First report will offer a combined summary report of customers and their YTD sales totals all together.</p> <p>Second report will offer summary breakdown of customers and each manufacturers YTD sales compared to previous year.</p> <p>Third report will offer sales history by manufacturer and each customer that placed sales in the current and previous years.</p> <p>Fourth report will offer a summary of the manufacturers and the customers YTD sales.</p> <p>**Perfect for running sales history to know YTD sales for each customer along with the manufacturer so you could target each customer precisely for every sale made in the previous year versus current year.</p>	✓	✓	✓	✓	✓	✓		
Salesperson Shared Orders	<p>This report will offer all orders that have been shared with another salesperson due to certain commission splits.</p> <p>**Very helpful for accounting purposes to know what amounts to split during commissions.</p>	✓		✓	✓				✓
Salesperson/Customer Buy History	This report will create a lengthy breakdown of three years from the current year and give detailed sales totals and count for each order code by manufacturer. This report is helpful to see where each customer has placed their orders for the manufacturers. Helps to know if the customer is primarily ordering from the road, show, direct, phone, or other.		✓		✓	✓			✓

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