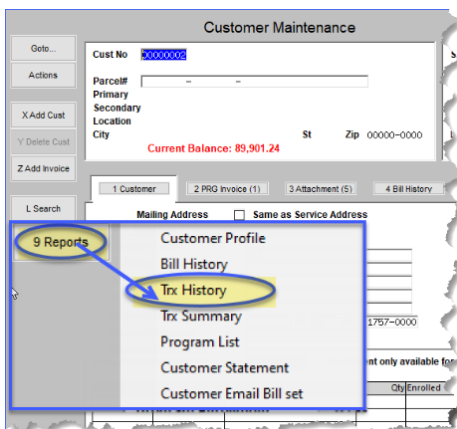# 1. CUSTOMER MAINTENANCE SCREEN REPORTS

ADMINS provides Customer Profile, Bill History, Transaction History, Transaction Summary, Program List, Customer Statement, and Customers with "Email Bill" set reports from the **[9 Reports]** button on the **[Customer]** tab.

<p align="center">Misc Billing ▶ Maintenance ▶ Customer Maintenance</p>

1 Customer	2 PRG Invoice (3)	3 Attachment (4)	4 Bill History	5 Trx History	6 Notes	7 Custom Fields	8 Field Logs (12)

1.1. Reports on the [1 Customer] Tab

Access the reports by clicking on the **[9 Reports]** button to reveal a menu of available reports.

Report #/Title	Description
10023 Customer Profile	This report provides the customer information found on tabs 1 and 2 of the customer maintenance screen. There are sections for Enrolled Programs and Program Invoices.

Report #/Title	Description	
10670 **Transaction** **History**		This report may be filtered by optional Bill Year Range, Date Range, and/or Program Type. It is available in **PDF®** and **Excel®** formats. This provides detail on all transactions that meet the selection criteria for the current customer.
10671 **Transaction** **History Summary**		This report may be filtered by optional Bill Year Range and/or **Program Type**. It is available in **PDF®** and **Excel®** formats. The report provides a summary by transaction date for the currently selected customer.

Report #/Title	Description
10672 Customer Bill History Summary	

Report #/Title	Description
10113 Program List	Please see section 1.2 below for details. The report may be run for a single customer, Program Department Group, or Program Type. Use the **[Lookup]** if the values are not known. **Task 10113: Customer Assigned Programs for Invoicing** ✕ **Customers Assigned Programs for Invoicing** **Optional: Enter Customer Number** `166` **Optional: Enter Program Department Group** [ ] [ ] **Optional: Enter Program Type** [ ] [ ] **Run as** ⦿ Preview ○ Print ○ PDF ○ Excel **If Printing use Duplex** ⦿ Yes ○ No [Lookup] [OK] [Cancel] [Clear All]
10668 Customer Statement	This report may be emailed by filling in the optional Email Address. Filter by Due Date and status. **Task 10668: Customer Statement (From Customer Screen)** ✕ **Customer Statement** **Optional: Enter As of Due Date** [ ] **Selection:** ⦿ All ○ Open Only ○ Current Month + Open ○ Current Month Only **Optional: Enter Email Address** [ ] **Optional: Enter Note 1** [ ] **Optional: Enter Note 2** [ ] **Optional: Enter Note 3** [ ] **Optional: Enter Note 4** [ ] **Run as** ⦿ Preview ○ Print ○ PDF **If Printing use Duplex** ⦿ Yes ○ No [Lookup] [OK] [Cancel] [Clear All]

CUSTOMER STATEMENT   Page 1 of 1

GOOD CHEMISTRY
5O CONGRESS STREET
SUITE 420
BOSTON MA 02109

Statement Date: 22-Mar-2023
Amount Due: $51,133.00
Customer Number: 00000163
Primary Address: 5O CONGRESS STREET

Invoice #	Description	Transaction Date	Charged	Adjustments/ Refunds	Payments	Balance	Past Due
000286-00	CANNABIS COMMUNITY HOST AGREEMEN	11-Aug-2022	$50,000.00			$50,000.00	$50,000.00
000363-00	HOA Fees	01-Feb-2023	$461.00			$461.00	$461.00
000911-00	HOA Fees	01-Nov-2022	$636.00			$636.00	
000911-00	ELECTRONIC FUNDS TRANSFER	01-Nov-2022			$636.00	-$636.00	
001504-00	HOA Fees	01-Nov-2022	$637.00			$637.00	$637.00
001504-00	Nov 2022 Late Fees	17-Nov-2022	$35.00			$35.00	$35.00
001652-00	HOA Fees	01-Nov-2022	$638.00			$638.00	
001652-00	ELECTRONIC FUNDS TRANSFER	01-Nov-2022			$638.00	-$638.00	
	Balances as of: 22-Mar-2023		$52,407.00	$0.00	$1,274.00	$51,133.00	$51,133.00

PAY THIS AMOUNT: $51,133.00

Report #/Title	Description	
10646 Customer with Email Bill set		Run this report to produce a list of customers to whom a bill or invoice can be emailed.

This lists customers with a checkbox and email address on the Customer screen, as shown below: |

1.2.   Reports on the [2 PRG Invoice] Tab

Report #/Title	Description	
10113 Program List		This report lists the programs that have been assigned to customers. The optional filter can limit the report to a **Single Customer**, **Program Department Group**, or **Program Type**. The example below is for a single customer.

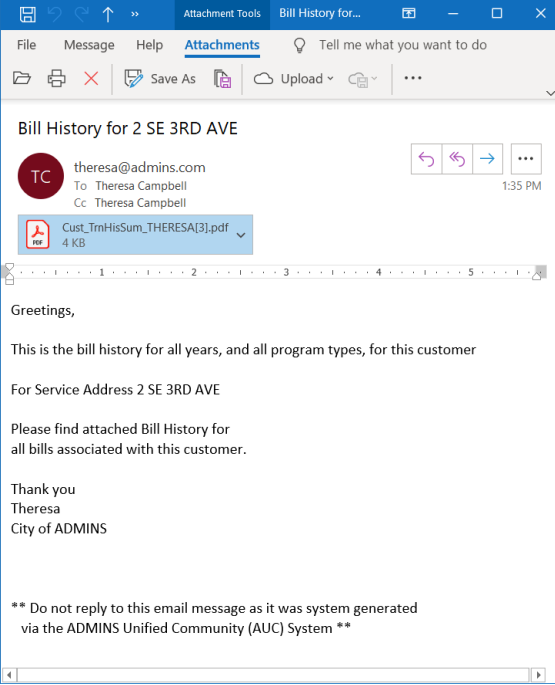| Report #/Title	Description

1.3. Reports on the [4 Bill History] Tab
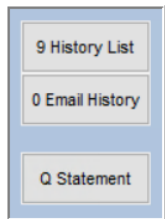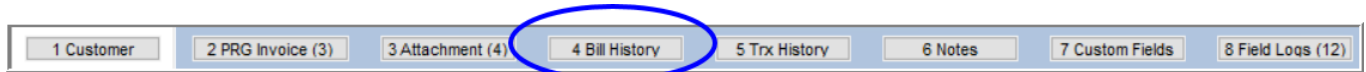
Use the **[9 History List], [0 Email History]**, and **[Q Statement]** buttons for customer reports.

Report #/Title	Description
[9 History List]	This is the same report as #10672.
[0 Email History]	

Report #/Title	Description	
		The Email History button presents the prompt shown above; the only Required field is the Email Address. The email will look like this and will include any note provided in addition to the standard "For Service Address…" and "Please find attached Bill History for all bills associated with this customer." The attachment will be called "Cust_TrnHisSum_*.pdf. There is no encryption or password on the emailed statement.
[Q Statement]	This report is the same as #10668 shown above.	

1.4.   Reports on the [5 Trx History] Tab

| 1 Customer | 2 PRG Invoice (3) | 3 Attachment (4) | 4 Bill History | 5 Trx History | 6 Notes | 7 Custom Fields | 8 Field Logs (12) |

9 History List

0 Summary List

X Email History

Q Statement

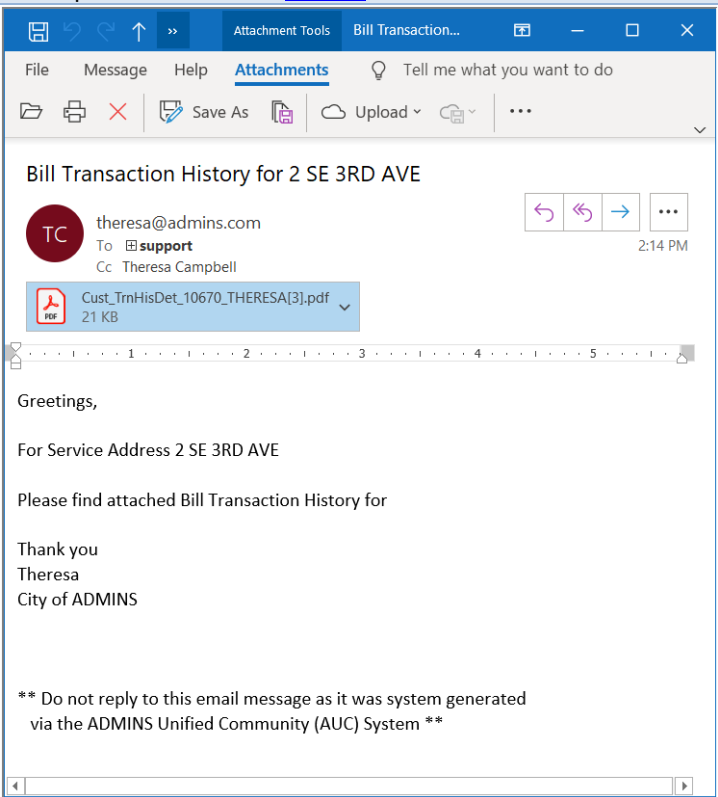| Report #/Title	Description	
[9 History List]	This is the same report as #10672.	
[0 Summary List]	This is the same report as #10671.	
[Q Statement]	This report is the same as #10668.	
[X Email History]		This generates an email that looks like this. The report attached to the email is the same as #10670.