



# 1. Report Library by Customer

Reports ▶ Report Library ▶ [3 Customer Reports]

[AUC] 10601-Report Library Customer [theresa]

### Report Library Customer

Goto...  
Actions

Report Categories

- 2 Collection Reports
- 2 Subscription Reports
- 3 Customer Reports
- 4 Program Invoice Reports
- 5 Other Reports

Report Name	View	Report	Last Run Date	Run Time
10618-Parcel vs Subscriber Address Mismatch	Sample	Run		
10616-Customer with no Parcel# assigned	Sample	Run		
10620-Customer Notes Report	Sample	Run	19-Feb-2021	13:47:30.71
10640-Customers with Duplicate Service Addresses	Sample	Run	01-Mar-2021	15:44:21.04
10642-Customers with Duplicate Parcel#	Sample	Run	19-Feb-2021	13:48:54.35
10666-Customers with Duplicate Names	Sample	Run	23-Feb-2021	10:39:03.89
10669-Customer Statement	Sample	Run	11-Aug-2021	14:12:11.26
10646-Customers with Bills/Invoices to be Emailed	Sample	Run	01-Jun-2021	11:41:07.86

## 1.1. # 10618 Parcel vs Subscriber Address Mismatch

Task 10618: Parcel vs Subscriber Address Mismatch

Customer Subscriber/Address Mismatch

Optional: Enter Program Type

Run as  Preview  Print  PDF  Excel

If Printing use Duplex  Yes  No

Lookup OK Cancel Clear All

This report is used for curbside / subscription invoicing programs. The report lists any differences between the subscriber name and the current owner name on the real estate parcel record for the parcel location.

This report has an optional filter, allowing the selection of a single program type. The report may be Run as Preview/Print/PDF® or Excel®.

Customer\_Mismatch\_10618\_MUPDEV5[1].xml - Microsoft Excel

Cust#	Subscriber	Real Estate Current Owner	Service Address	Parcel Location
00000001	WILLIAMS KEVIN A	BEAMER DAVID B	383 POPE RD	383 POPE RD
00000007	FEIGH LESLIE A S	FEIGH LESLIE A S TR	149 SPENCER BROOK RD	149 SPENCER BROOK RD
00000015	MCBRIDE MELISSA S TR	WILSON KATHERINE K	107 SPENCER BROOK RD	107 SPENCER BROOK RD
00000018	EVARTS THOMAS M	POWER JOHN & BETH RAKOW TR	339 POPE RD	339 POPE RD
00000019	PATRICK MICHAEL	PATRICK MICHAEL R	337 POPE RD	337 POPE RD
00000022	NIELDS HENRY C & OLIVIA M	DOE THOMAS G TR	357 WESTFORD RD	357 WESTFORD RD
00000023	MACBETH ALYSSA	SULLIVAN HERRY L	37 CREST ST	37 CREST ST
00000025	JOSEPH WAIANT	WANG JOSEPH	25 SPENCER BROOK RD	25 SPENCER BROOK RD
00000027	KWON RONALD C & CAROLYN SUSAN	KWON TR, RONALD C	1702 LOWELL RD	1702 LOWELL RD
00000030	MEEHAN KURT P & BETTY L TR	MEEHAN KURT P & JACQUELINE M	1764 LOWELL RD	1764 LOWELL RD
00000034	NELSON NANCY ANN	LAWSON, MICHAEL E TR	1695 LOWELL RD	1695 LOWELL RD
00000035	ELIZA APANG	SCHONBRUN DAVID G	1679 LOWELL RD	1679 LOWELL RD
00000036	IRVIN WARREN H & ALEXANDRINA E	BAS ALEJANDRO RODRIGUEZ	1663 LOWELL RD	1663 LOWELL RD
00000038	WIGHT SUZANNE HAWKES	OCONNOR JOHN F TR	1629 LOWELL RD	1629 LOWELL RD

Figure 1 The #10618 Parcel vs Subscriber Address Mismatch Report Run as Excel®

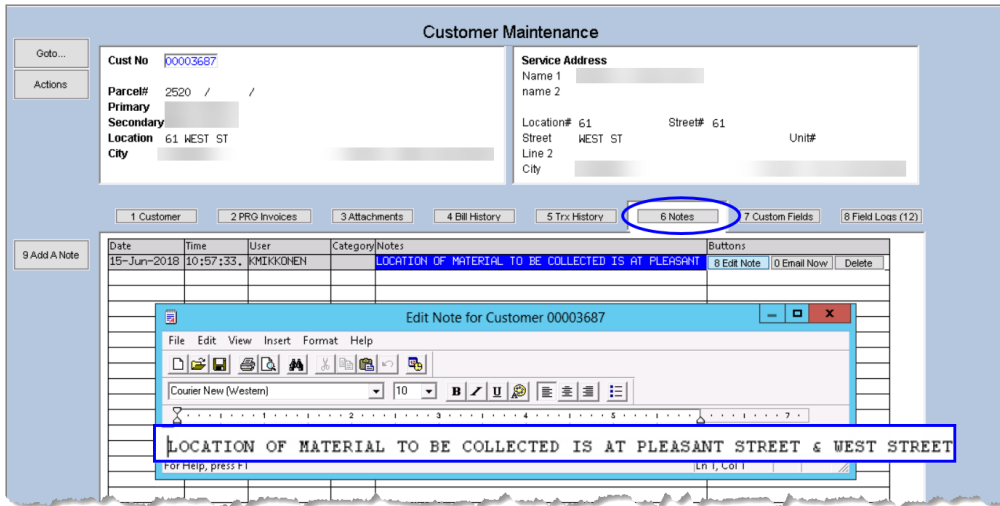


### 1.2. # 10515 Customer with No Parcel # assigned

This report will identify subscription customers with no parcel # assigned; it is only relevant to sites that require a parcel number for each customer.

### 1.3. # 10620 Customer Notes Report

Misc Billing ▶ Maintenance ▶ Customer Maintenance ▶ [6 Notes]



Add notes using the [9 Add A Note] tab of the [6 Notes] tab on the Customer Maintenance screen. This report produces a list of notes that were entered for customers. Filter the report by: Customer Number, Note Category, User, Entry Date, and Service Type. Run the report as Preview/Print/PDF® or Excel®.

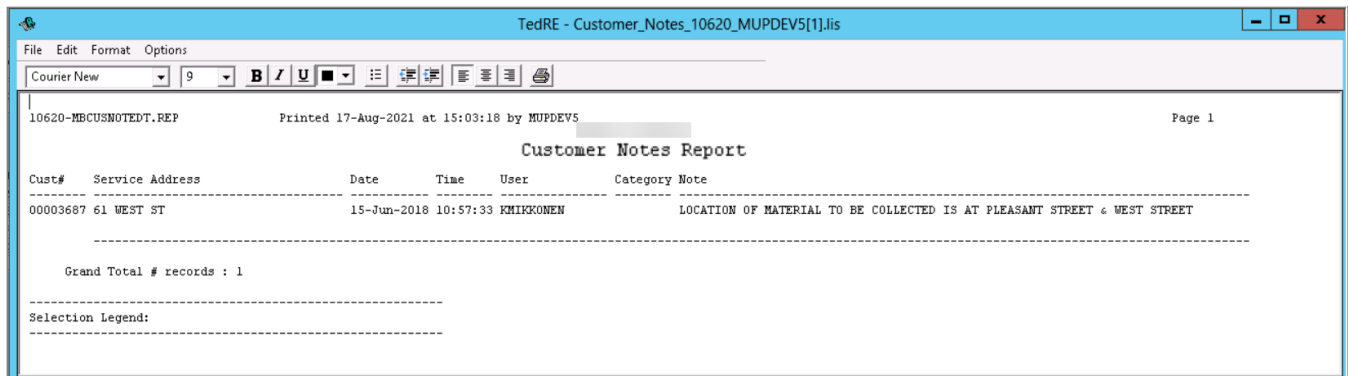
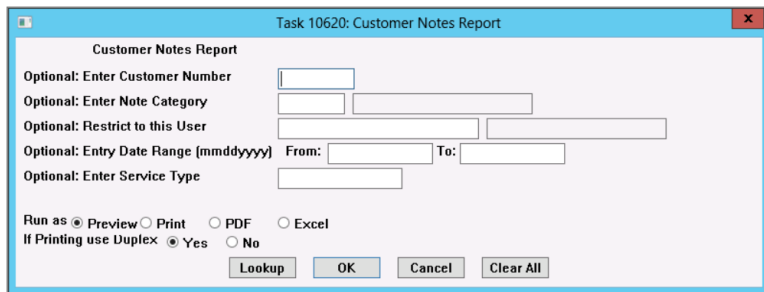


Figure 2 # 10620 Customer Notes Report Run as Preview/Print/PDF®



### 1.4. # 10640 Customers with Duplicate Service Addresses

This report includes a column that shows if there are active programs for the service address. Investigate duplicates; some that have active programs may be valid and remain separate, but others may need to be combined.

Reports ▶ Report Library ▶ [3 Customer Reports] ▶ #10640 Customers with Duplicate Service Addresses

Printed 01-Mar-2021 at 15:44:47 by THERESA  
City of ADMINS  
Customers with Duplicate Service Addresses

Service Address	Cust#	Subscript Active	Program Active
170 WYOMING AVE 170 WYOMING AVE	00000143	No	Yes
2 SE 3RD AVE 2 SE 3RD AVE	00000158	No	Yes
20 S BABCOCK ST 20 S BABCOCK ST	00000151	No	No
22 GATEWAY RD 22 GATEWAY RD	00000166	No	Yes
2239 SHAWNEE MISSION PKY 2239 SHAWNEE MISSION PKY	00000055	No	No
	00000169	No	Yes

**1. Duplicate customer service addresses should be investigated - if there are active programs on both addresses, check to see if they should be combined.**

**2.- if there are no active programs, inactivate the customer - in this example, inactivate customer 151.**

For duplicate addresses created by mistake, set the address with no active programs to be inactive.

Maintenance ▶ Customer Maintenance ▶ Select Customer ▶ [Actions] ▶ Inactivate Record

[AUC] 10000-Customer Maintenance

Customer Maintenance

Goto... Actions

Cust No: 00000151

Parcel# Primary

St Zip 00000-0000

Service Address

Name 1 JUNO CHEFS INCORPORATED

Name 2

Location# 2 Street# 2

Street SE 3RD AVE Unit#

Line 2

City MESQUITE St TX Zip 75149-0000

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

**Inactivate Record**

### 1.5. # 10666 Customers with Duplicate Names

Reports ▶ Report Library ▶ [3 Customer Reports] ▶ #10666 Customers with Duplicate Names



Task 10666: Customers with Duplicate Names

**Customer Name Duplicates**

Run as  Preview  Print  PDF  Excel  
 If Printing use Duplex  Yes  No

Lookup OK Cancel Clear All

Duplicate\_Names\_10666\_THERESA[1].xml - Excel

	A	B	C	D	E	F	G	H
1	Customer_Name	Cust#	Active_Sub	Active_Prg	Service-Address	Entered_By	Entered_On	
156	TRI STATE REFUELER CO	00000047	No	No	128 BRANSTEN RD	THERESA	2/3/2021	
157	TRI STATE REFUELER CO	00000080	No	No	128 BRANSTEN RD	THERESA	2/3/2021	
158								
159	TRUHLAR AND TRUHLAR ATTYS	00000022	No	No	5 BOSTON AVE #88	ANTHEA	2/1/2021	
160	TRUHLAR AND TRUHLAR ATTYS	00000035	No	Yes	5 BOSTON AVE #88	ANTHEA	2/1/2021	
161								
162	TRI M TOOL INC	00000051	No	No	2881 LEWIS RD	THERESA	2/3/2021	
163	TRI M TOOL INC	00000084	No	No	2881 LEWIS RD	THERESA	2/3/2021	
164								
165	VICON CORPORATION	00000064	No	No	71 SAN MATEO AVE	THERESA	2/3/2021	
166	VICON CORPORATION	00000097	No	No	71 SAN MATEO AVE	THERESA	2/3/2021	
167								
168	W TC INDUSTRIES INC	00000148	No	No	3 ASPEN ST	THERESA	2/4/2021	
169	W TC INDUSTRIES INC	00000163	No	No	3 ASPEN ST	THERESA	2/4/2021	
170								
171	WYE TECHNOLOGIES INC	00000069	No	No	65895 S 16TH ST	THERESA	2/3/2021	
172	WYE TECHNOLOGIES INC	00000102	No	No	65895 S 16TH ST	THERESA	2/3/2021	
173								
174	WHITEHALL ROBBINS LABS DIVSN	00000149	No	No	32860 SIERRA RD	THERESA	2/4/2021	
175	WHITEHALL ROBBINS LABS DIVSN	00000164	No	No	32860 SIERRA RD	THERESA	2/4/2021	
176								

Mbcusnamdup

Run the report on demand from the report library. Resolve duplicates prior to assigning programs, billing, and collecting payments.

## 1.6. # 10669 Customer Statements

Task 10669: Customer Statement

**Customer Statement**

Optional: Enter Customer Number

Optional: Enter As of Due Date

Optional: Enter Program Type

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

The customer statement is a standard statement that may be emailed on request or printed locally.

The selections are described in the table below; a sample statement is shown in Figure 3.

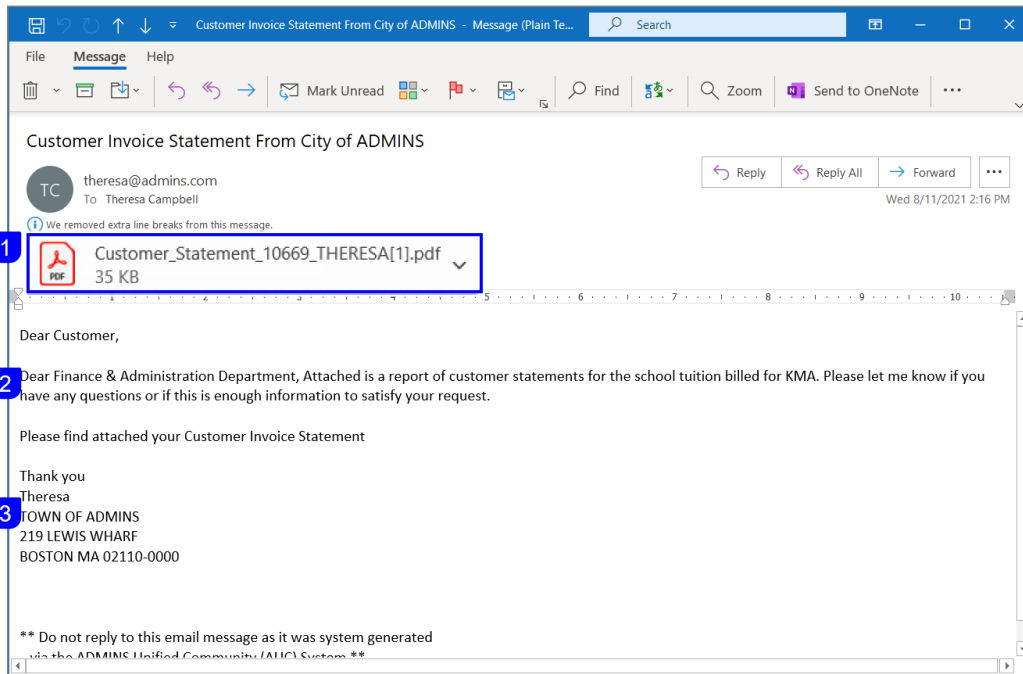


WOONSOCKET PUBLIC SCHOOLS SPECIAL EDUCATION DIRECTOR JANET SULLIVA 108 HIGH STREET				Customer ID: 00000003 1st Phone : (401) 767-4627 Business 2nd Phone : (000) 000-0000						
-----										
Invoice#	Program	Service Type	Invoice Date	Due Date	Charged	Adjustments & Refunds	Payments	Line Balance	Invoice Balance	Past Due
000134-00	SCHTUITKMA	Quarterly Invoice	06-Aug-2021	15-Aug-2021	483.34			483.34	483.34	
					483.34			483.34		
-----										
10669-MBCUSMTM.REP				Printed 11-Aug-2021 at 14:15:55 by THERESA City of ADMINS Customer Statement				Page 2		
Rachel Smith Asst Supt for Student Services 219 LEWIS WHARF BOSTON, MA 02110 617-494-5100 PAYMENTS@ADMINS.COM										
FRAMINGHAM PUBLIC SCHOOLS DIRECTOR OF SP EDUCATION LAURA SPEAR 73 MT WAYTE AVENUE, STE. 2				Customer ID: 00000005 1st Phone : (508) 424-3458 Business 2nd Phone : (000) 000-0000						
-----										
Invoice#	Program	Service Type	Invoice Date	Due Date	Charged	Adjustments & Refunds	Payments	Line Balance	Invoice Balance	Past Due
000102-00	SCHTUITKMA	Bad Check Fee	24-Jun-2021	24-Jun-2021						
000102-00	SCHTUITKMA	Quarterly Invoice	24-Jun-2021	24-Jun-2021	2,416.70		1,000.00	1,416.70	1,416.70	1,416.70
000103-00	SCHTUITKMA	Bad Check Fee	24-Jun-2021	24-Jun-2021						
000103-00	SCHTUITKMA	Quarterly Invoice	24-Jun-2021	24-Jun-2021	2,416.70			2,416.70	2,416.70	2,416.70
000135-00	SCHTUITKMA	Quarterly Invoice	06-Aug-2021	15-Aug-2021	483.34			483.34	483.34	
000136-00	SCHTUITKMA	Quarterly Invoice	06-Aug-2021	15-Aug-2021	483.34			483.34	483.34	
					5,800.08	1,000.00		4,800.08	3,833.40	

Figure 3 Customer Statement

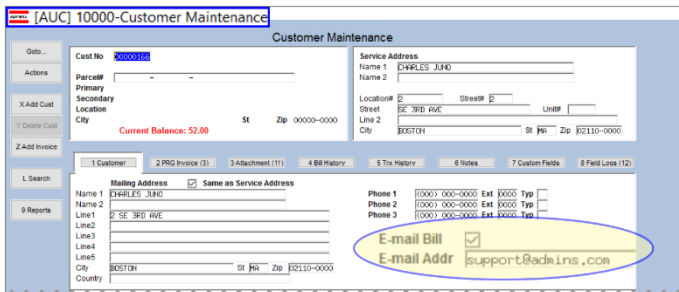
Table 1 Customer Statement Prompt and Options

Prompt	Description/How used
<b>Optional: Enter Customer Number</b>	If left blank will list all customers, one per page
<b>Optional: Enter As of Due Date:</b>	Will only include invoices that are due on or before this date. If left blank will include all invoices
<b>Optional: Enter Program Type</b>	Will only include invoices for the specified Program. The program name may be entered directly or selected from a <b>[Lookup]</b>
<b>Selection:</b>	<input checked="" type="radio"/> All All invoices that are associated with a customer with or without a balance <input type="radio"/> Open Only Only those invoices that have either a balance or credit <input type="radio"/> Current Month + Open All invoices billed in current month using todays date, and all prior invoices that still have an open balance <input type="radio"/> Current Month Only All invoices billed in current month. Does not include prior invoices that still have open balance
<b>Email address</b>	Optional. To email the report, enter the recipient email address; to send to multiple recipients, separate each email address with a comma (but no space)
<b>Note 1 – Note 4</b>	Optional. If sending report by email, include this text in the body of the email. Up to four 80 character notes may be included.



- 1 The email will contain the customer statement as an attachment in PDF® format.
- 2 The text entered in the four notes fields will be included in the body of the email.
- 3 The return address will include the username, and the address for the department issuing the statement.

### 1.7. #10646 Customers with Bills / Invoices to be Emailed



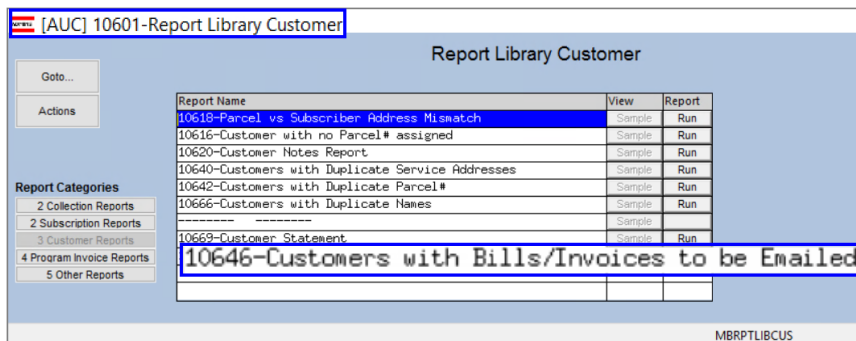
This is a report of customers who have elected to receive bills via email rather than a paper bill sent by postal mail.

This is set on the:

**Misc Billing ▶ Customer Maintenance ▶ [1 Customer]** screen. Check the **E-mail Bill**  box and enter the email address.

Run the report here:

**Misc Billing ▶ Reports ▶ Report Library ▶ [3 Customer Reports] ▶ #10646 Customers with Bills/Invoices to be Emailed**







Task 10646: Customers with Bills/Invoices to be Emailed

**Customers with Bills/Invoices to be Emailed**

Select Status:  All  Only Active  Only Inactive

Run as  Preview  Print  PDF  Excel

If Printing use Duplex  Yes  No

Lookup OK Cancel Clear All

Select from  All,  Only Active, or  Only Inactive customers to be reported on.

The report is available to be Run as Preview/Print/PDF® format or Excel®.

	A	B	C	D	E
1	Cust#	Owner-Name	Service-Address	Email Address	
2	00000002	VISTRA ENERGY	6555 SIERRA DR	theresa@admins.com	
3	00000014	BENTON, JOHN B JR	6649 N BLUE GUM ST	anthea@admins.com	
4	00000015	CHANAY, JEFFREY A ESQ	4 B BLUE RIDGE BLVD		
5	00000016	CHEMEL, JAMES L CPA	8 W CERRITOS AVE #54	anthea@admins.com	
6	00000017	FELTZ PRINTING SERVICE	639 MAIN ST	anthea@admins.com	
7	00000018	PRINTING DIMENSIONS	34 CENTER ST		
8	00000027	JOHN ADAMS	6649 N BLUE GUM ST		
9	00000028	GEOFFREY CHANDLER	4 B BLUE RIDGE BLVD		
10	00000029	JAMES CHEMEL	88 W CERRITOS AVE #54		
11	00000030	MARTIN VAN BUREN	639 MAIN ST		
12	00000031	HARRY S. TRUMAN	33 CENTER ST		
13	00000040	CLARK, RICHARD CPA	386 NINTH AVENUE	support@admins.com	

Figure 4 Run as Excel®

TedRE - Customers\_with\_BillstoEmail\_10646\_THERESA[2].jis

10646-MBCUSBILEM.L.REP Printed 17-Aug-2021 at 14:24:35 by THERESA Page 1

**Customers with Bills/Invoices to be Emailed**

Cust#	Owner-Name	Service-Address	Email Address
00000023	RICHARD CLARK	386 NINTH AVENUE	support@admins.com
00000024	MOSKOWITZ, BARRY S	74874 ATLANTIC AVENUE	support@admins.com
00000025	JAMES MOUNTAIN, PARENT OF ANNA DANE	366 SOUTH DR	support@admins.com
00000026	LAURIE ANDERSON, PARENT OF LOUISE REED	45 E LIBERTY ST	support@admins.com
00000027	GIAMPIETRO, ANTHONY D, PARENT OF BENEDICT	4 RALPH CT	support@admins.com
00000028	KEEGAN HOOVER, PARENT OF MABEL HOOVER	2742 DISTRIBUTION WAY	support@admins.com
00000029	RONALD MOSCOCCO, PARENT OF DAVID MOSCOCCO	426 WOLF ST	support@admins.com
00000030	TRI STATE WHEELER CO	128 BRAMSTEN RD	support@admins.com
00000031	PARKWAY COMPANY	17 MORENA BLVD	support@admins.com
00000032	FBS BUSINESS FINANCE	775 W 17TH ST	support@admins.com
00000033	EDER ASSOCS CONSULTING ENGRS PC	6980 DORSETT RD	support@admins.com
00000034	TRI M TOOL INC	2881 LEWIS RD	support@admins.com
00000035	INTERNATIONAL EYELETS INC	7219 WOODFIELD RD	support@admins.com
00000036	RAPID TRADING INTL	1048 MAIN ST	support@admins.com
00000037	ABC ENTERPRISES INC	678 AVE	support@admins.com
00000038	CINDY TURNER ASSOCIATES	20 S BARCOCK ST	support@admins.com
00000039	STANTON, JAMES D ESQ	2 LIGHTHOUSE AVE	support@admins.com
00000040	GRACE PASTRIES INC	3898B PARK BLVD	support@admins.com
00000041	SCHROER, GENE E ESQ	5 TOMAHAWK DR	support@admins.com
00000042	KNIGHTS INN	762 S MAIN ST	support@admins.com
00000043	BOLLINGER MACH SHP & SHIPYARD	209 DECKER DR	support@admins.com
00000056	ARTHUR A OLIVER & SON INC	59 N GROESBECK HWY	support@admins.com
00000057	GEORGE JESSOP CARTER JEWELERS	2664 LEWIS RD	support@admins.com
00000063	PRIVATE PROPERTIES	74 W COLLEGE ST	support@admins.com
00000064	ROWLEY SCHLIMGEN INC	701 S HARRISON RD	support@admins.com
00000065	FORGING SPECIALTIES	1088 PINEHURST ST	support@admins.com
00000066	SMITS, PATRICIA GARIITY	30 W 80TH ST #1995	support@admins.com
00000067	H LEE LEONARD ATTORNEY AT LAW	20932 HEDLEY ST	support@admins.com
00000068	A K CONSTRUCTION CO	2737 FISTORIO RD #9230	support@admins.com
00000069	AMBLANG, JESSICA M MD	74987 BRANDON ST	support@admins.com
00000070	Q & A SERVICE	6 HAINS AVE	support@admins.com
00000071	WOOD & WHITRACE CONTRACTORS	4756S W GRAND AVE	support@admins.com
00000072	MARK IV FRESS LTD	4284 DORIGO LN	support@admins.com
00000073	MUSEUM OF SCIENCE & INDUSTRY	6794 LAKE DR E	support@admins.com
00000074	GARRISON IND	31 DOUGLAS BLVD #950	support@admins.com
00000075	SARONIX HYMEH PRODUCTS	44 W 4TH ST	support@admins.com
00000076	SMC INC	11279 LOYTAN ST	support@admins.com

Selection Legend:  
Grand Total # records: 37  
Select Status: All

Figure 5 Run as Preview/Print/PDF®