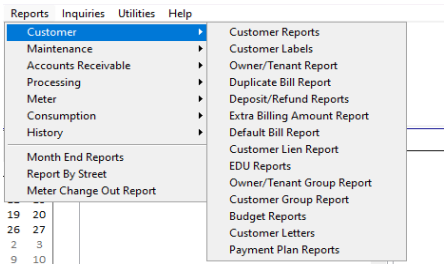
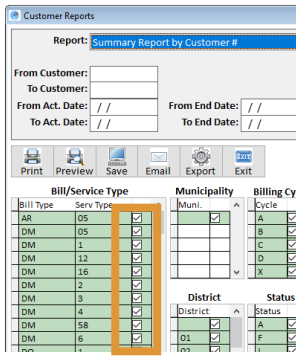
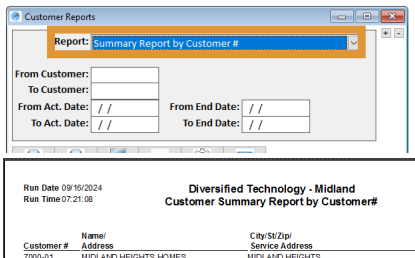
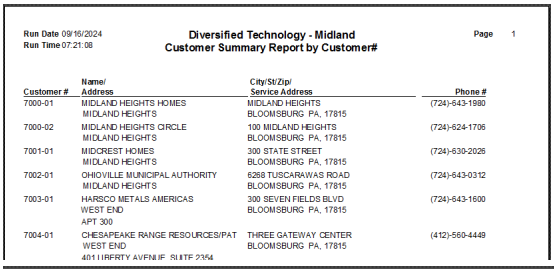
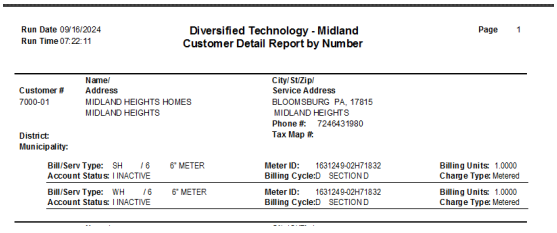
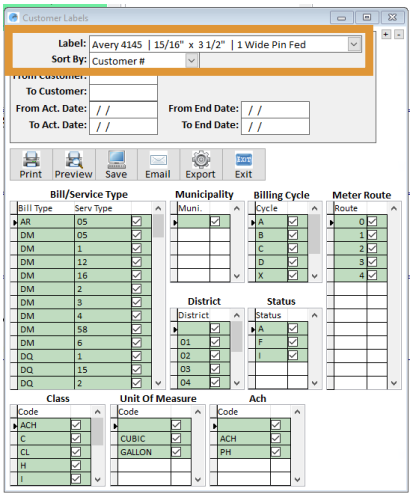
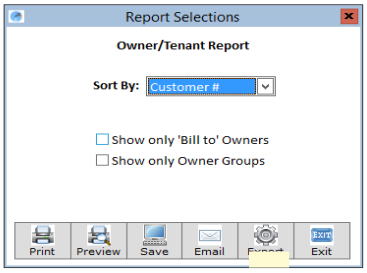
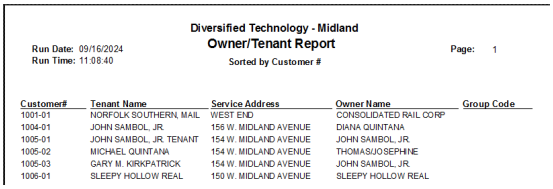
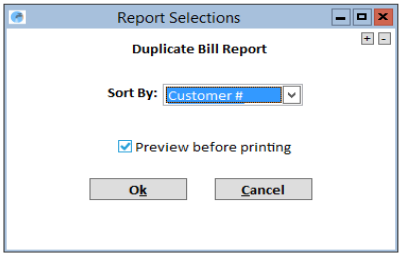
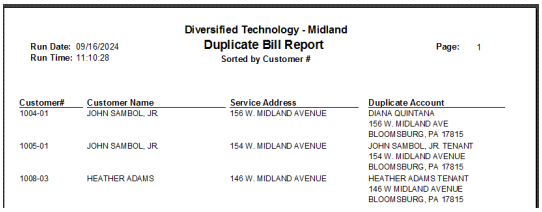
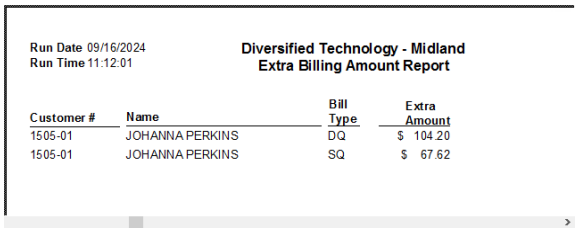
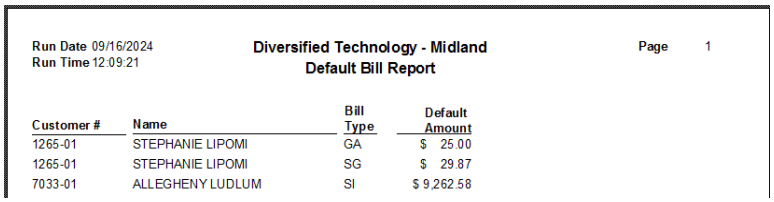
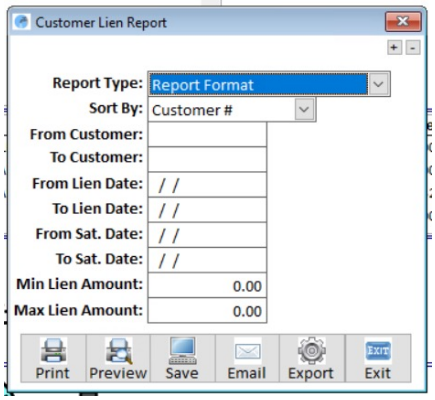
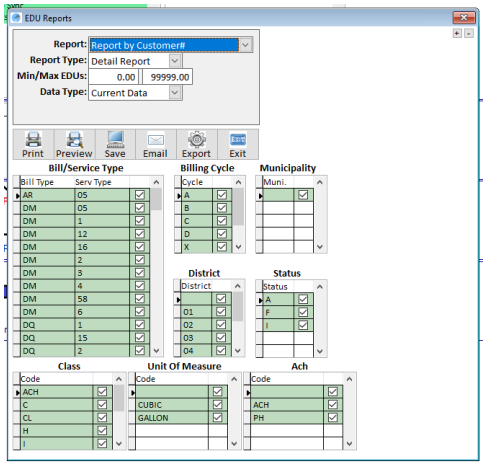
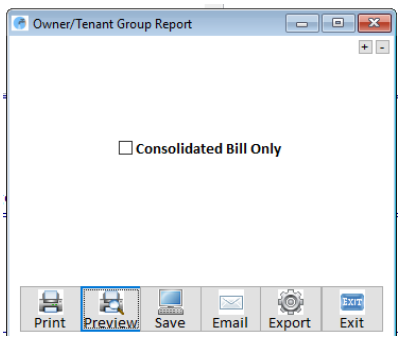
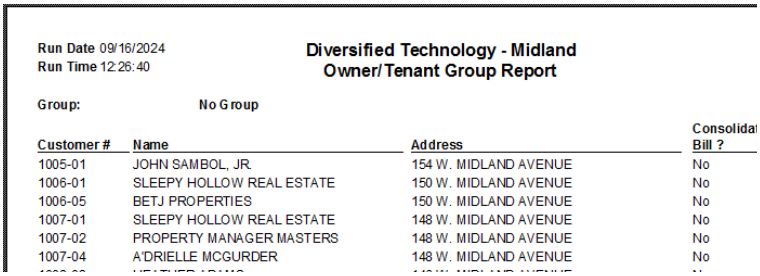
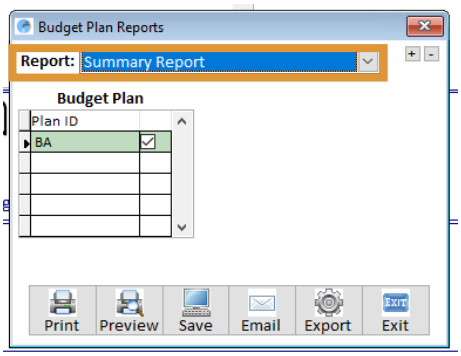
Customer Reports

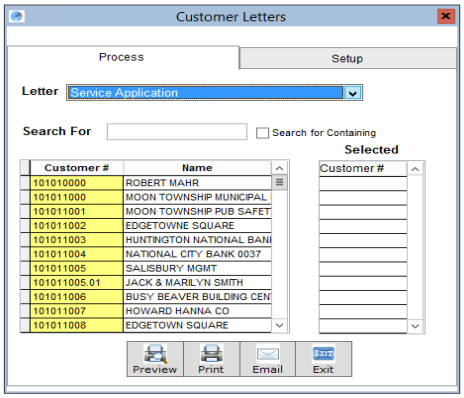
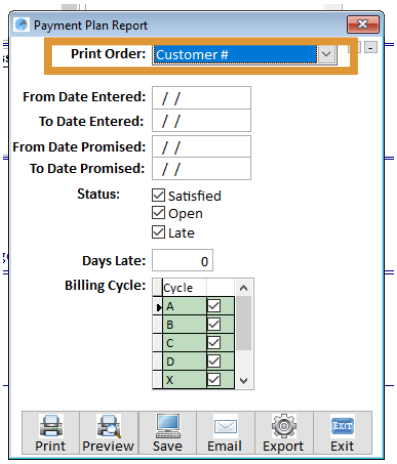
This step action table that will help you find reports based on customers and customer-related data
This step action table covers each report available from the landing page.

Step	Action	Support
1.	To access the list of reports, click on **Reports** tab at top of the ribbon or via the icon on the landing page.	
2.	The **Customer Reports** option allows you to view reports based on the customer and the customer number. *Note: You can filter by different report types. You can toggle these on and off by using the check boxes.*	
3.	You can choose your reports in detail and summary.	  

Step	Action	Support
4.	**Customer Labels** allows you to print labels for your customers. These labels can be used to mail bills or letters to customers. You can adjust the type of labels you are using, and you may also adjust the order in which the labels print out.	
5.	The **Owner/Tenant Report** allows you to view a report of all the customers you have under the owner/tenant description in customer maintenance.	 
6.	The **Duplicate Bill Report** allows you to view all customers that are set up to receive a duplicate bill. The report also shows you the service address and the duplicate bill address. *Note: Duplicate bills are set up so that two people receive the same bill, in an owner/tenant situation.*	 

Step	Action	Support
7.	The **Extra Billing Amount Report** shows you when an extra amount of money was billed to a customer.	
8.	The default bill report shows the customers that have a default bill set up in the Customer Maintenance screen. *Note: Default bill amount can be entered per customer in the Service Maintenance screen in **Customer Maintenance**.*	
9.	The **Customer Lien Report** lists the customers who currently have a lien on their property.	
10.	Equivalent Dwelling Units (EDU) Reports allow you to view customers based on the number of EDU's they have associated with their accounts.	

Step	Action	Support
11.	**Owner/Tenant Group Reports** allow you to view a report of customers currently set up in an owner/tenant group.	 
12.	**Budget Reports** allow you to view a report on customers currently on a budget plan. You can select the following from the report dropdown: **Summary Report**, **Reconciliation Report**, **Reconciliation Letter**, **Past Due Report** and **Past Due Letter**.	
13.	**Customer Letters** allows you to print and send letters to the selected customers. This process will be run from the landing page. If you are using VUB you will select this process by Reports>Customer>Customer Letters.	 Letters

Step	Action	Support
14.	In the letter drop-down you can choose the appropriate letter that you would like to send. *Note: To add a letter to the drop down, you will need to do so in the set-up tab. To add a new letter, it will need to be created in a program in the proper format (contact Diversified Technology for assistance).*	
15.	The **Payment Plan Report** option allows you to view and print reports that show the customers currently on a payment plan, based on filters you provide.