



Store Manual

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Chapter 12: Reporting, Dashboard, KPIs, and Statistics

FASTINFO: Home Screen and Running Reports

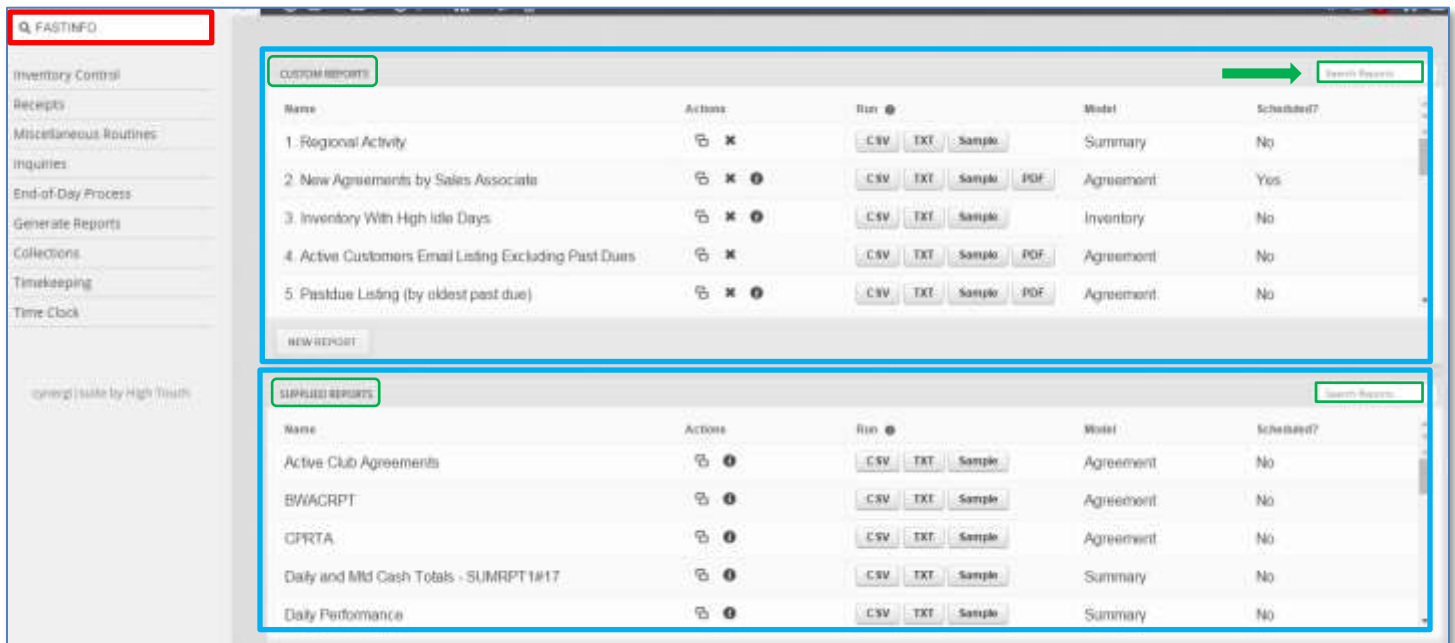
FASTINFO provides clients simple, fast, and easy access to their data in a Relational Database (SQL). Store and Home Office personnel are able to access supplied reports or build custom reports. The reports can be generated in one of four commonly used formats (CSV, PDF, plain text, or in a sample HTML format).

Core Benefits with FASTINFO

- FASTINFO provides **easy access to data** using **simple** methods to select and sort data, and quickly **generate reports**.
- FASTINFO is built upon **SQL**.
- FASTINFO makes **custom report creation easy** by simply selecting report data models, data columns, and filters from a drop-down list. Users do not need to have SQL experience to take advantage of this powerful tool since FASTINFO does the SQL processing for you.
- FASTINFO reports can be generated in **one of four commonly used formats** (CSV, PDF, plain text, or Sample/HTML).
- FASTINFO offers **scheduled auto-generation** of reports that can be emailed and/or sent to the Reportal.

How to Access FASTINFO and Home Screen

You can access the FASTINFO Home screen by simply typing **FASTINFO** into the **Jump-To** box and pressing the **TAB** or **ENTER** key. You may also select it from your company’s cynergi|suite menu. The Home screen has a **Custom Reports** and a **Supplied Reports** section. There is a **Search Reports** box in the upper right corner within each corresponding **Custom** or **Supplied Reports** section. When doing a search, the system will search within the **Report Name** and **Report Data Model** columns.



The **Supplied Reports** section consists of several existing cynergi|suite reports recreated in FASTINFO. These reports cannot be edited or deleted. However, they can be “Cloned,” which allows alteration as needed.

The **Custom Reports** section consists of reports created by users (typically Home Office or Management). These reports can be created from scratch or cloned from another **Supplied** or **Custom** report. Depending upon Security and Privilege Levels defined by your Company, some store personnel may also have the ability to add, clone, or edit reports.

Please Note: FASTINFO is a basic custom report generation tool that is included with the cynergi|suite store system.

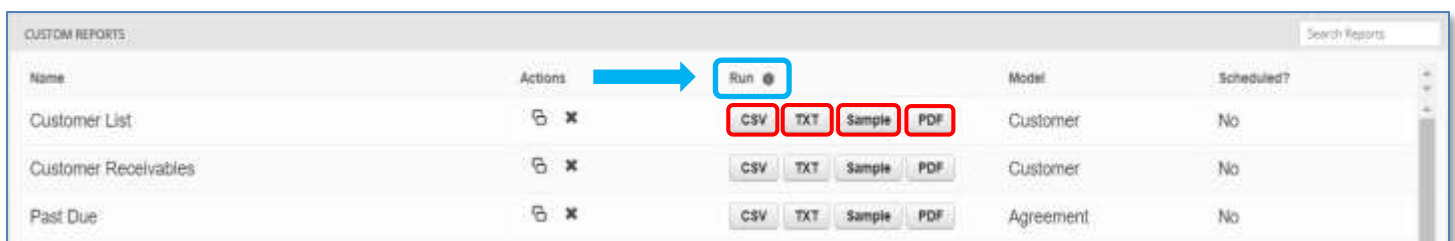
Therefore, having the ability to generate reports to do calculations (tax, sub-total generation, totals by Locations/groups, etc.) or generating by Location Groups or specific variations of existing cynergi|suite or FASTINFO reports is limited.

- *These capabilities may be possible with FASTINFO by selecting the option of generating the report into a CSV file and using Excel (or any other comparable spreadsheet software).*
- *Furthermore, greater flexibility is available with the High Touch **Premium Business Intelligence (BI) application**. Please contact your Account Manager for more details on this feature.*




How to Generate a FASTINFO Report and Other Report Options

You can run/generate a FASTINFO report by selecting a button on the **Run** column for your desired Report Name.

- **Report Name** – This is the Name of the FASTINFO report. These reports are displayed in alphabetical order.
- **Run (Generate)** – Clicking on one of the **CSV**, **TXT**, **Sample**, or **PDF** buttons will generate the reports within the selected format, either by the browser downloading the specific format or displaying it on the screen. These Output Run options are available from the main FASTINFO **Home** screen and from the **Report Creation** screen.
 - **CSV** – This option allows the ability to generate the report to a CSV file. Generating in this format will allow the report information to be moved into Excel, which allows for greater sorting or manipulating of the report data.
Please Note: There may be limitations in the amount of data that can be handled by CSV (Excel) depending upon how much data/columns are being selected.
 - **TXT** – This Text option allows the ability to generate the report into a plain text format.
 - **Sample** – This option opens the report within the cynergi|suite HTML screen. Generating in this format will display the report in a format that is similar to many of the cynergi|suite screens.
 - **PDF** – This option allows the ability to generate the report into a PDF format. Generating in this format will provide for ease of printing, saving, or emailing the report.
*Please Note: The PDF output option is only available for reports with 10 or fewer columns. Furthermore, the maximum number of rows generated to PDF is 1,000 rows, or roughly 33 pages in length. **The PDF button will not appear if the maximums are exceeded.***



Other Actions and Information exist for each selected FASTINFO report.

- **Actions** – The following Actions available for each report.
 -  **Clone Report** – Click this icon to clone/copy an existing report
 -  **Delete** – Click this icon to delete a Custom Report (Supplied Reports cannot be deleted)
 -  **Information** – Hovering the mouse over this icon will display the Report Description

The screenshot displays two sections of the FASTINFO report interface: 'CUSTOM REPORTS' and 'SUPPLIED REPORTS'. Both sections feature a table with columns for Name, Actions, Run, Model, and Scheduled?. In the 'CUSTOM REPORTS' section, the 'Actions' column for five reports (Customer List, Customer Receivables, Past Due, TEST, TEST2) is highlighted with a red box. A blue arrow points to the 'Actions' header in this section. In the 'SUPPLIED REPORTS' section, the 'Actions' column for five reports (Active Club Agreements, BWACRPT, CPRTA, Daily and Mid Cash Totals - SUMRPT1#17, Daily Performance) is highlighted with a red box.

CUSTOM REPORTS				
Name	Actions	Run	Model	Scheduled?
Customer List		CSV TXT Sample PDF	Customer	No
Customer Receivables		CSV TXT Sample PDF	Customer	No
Past Due		CSV TXT Sample PDF	Agreement	No
TEST		CSV TXT Sample PDF	Customer	No
TEST2		CSV TXT Sample PDF	Agreement	No

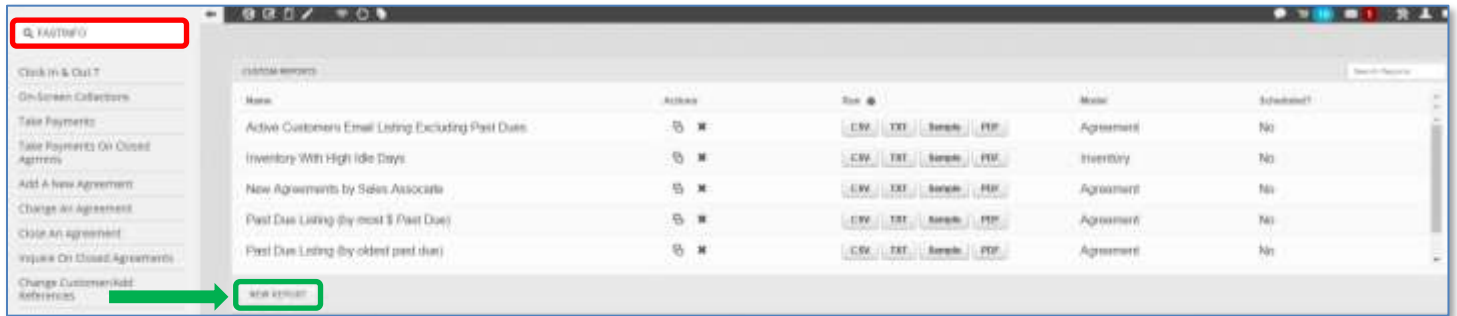
SUPPLIED REPORTS				
Name	Actions	Run	Model	Scheduled?
Active Club Agreements		CSV TXT Sample	Agreement	No
BWACRPT		CSV TXT Sample	Agreement	No
CPRTA		CSV TXT Sample	Agreement	No
Daily and Mid Cash Totals - SUMRPT1#17		CSV TXT Sample	Summary	No
Daily Performance		CSV TXT Sample	Summary	No

FASTINFO: Creating Reports and Security

How to Create a Custom FASTINFO Report

You can access the FASTINFO Home screen by simply typing **FASTINFO** into the **Jump-To** box and pressing the **TAB** or **ENTER** key. You may also select it from your company's cynergi|suite menu.

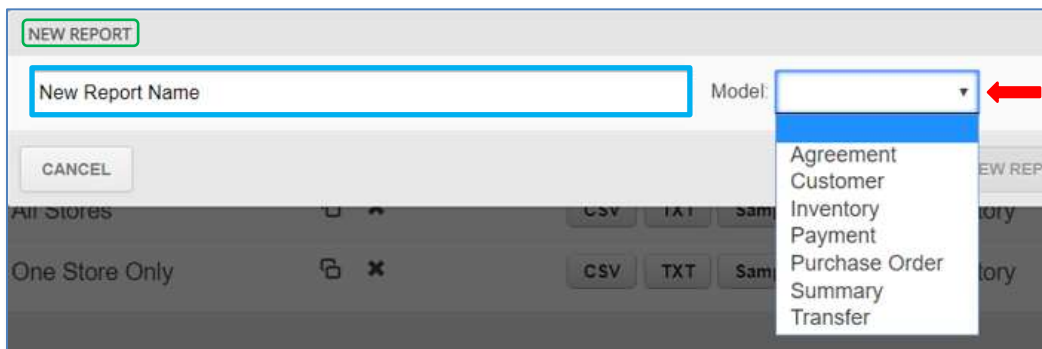
From the Home screen, select **NEW REPORT**.



At the **New Report** screen, input the name for the report you are creating and select a Data Model from the **Model** pick list for the report.

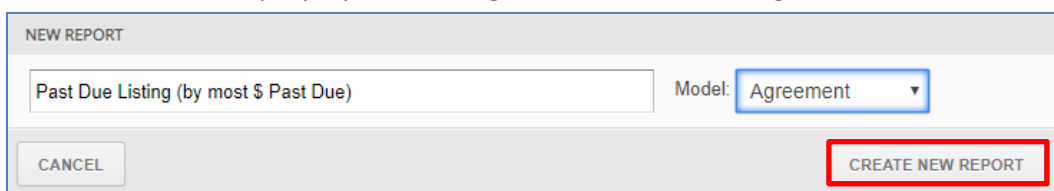
The **FASTINFO Data Models** are report fields that pertain to a specific main subject area of the cynergi|suite system where you can generate reports. The Model selected will be the main basis of the report you are creating. Below are a listing of current **Models** available:

- **Agreement** – Data specific to Rental Agreement reporting
- **Customer** – Data specific to Customer information reporting
- **Inventory** – Data specific to the Inventory reporting
- **Payment** – Data specific to Payments made
- **Purchase Order** – Data specific to Purchase Order reporting
- **Summary** – Data specific to End of Day Summary Data reporting
- **Transfer** – Data specific to Inventory Transfer Transactional reporting



Clicking **CREATE NEW REPORT** will create the initial build of the report and return to the FASTINFO Home screen.

Please Note: For example purposes, the **Agreement Model** is being used.



Upon returning to the Home screen from clicking the **CREATE NEW REPORT** button, click anywhere on the new report line (where there are no other buttons). **Doing this will begin the actual creation of the new report.**

Name	Actions	Run	Model	Scheduled?
Active Customers Email Listing Excluding Past Dues		CSV TXT Sample PDF	Agreement	No
Inventory With High Idle Days		CSV TXT Sample PDF	Inventory	No
New Agreements by Sales Associate		CSV TXT Sample PDF	Agreement	No
Past Due Listing (by most \$ Past Due)		CSV TXT Sample PDF	Agreement	No

Adding Report Columns

The initial **FASTINFO Report Creation** screen will be blank with the note “This report contains no data. Add some columns!”

Click the **ADD COLUMNS** button to continue.

PAST DUE LISTING (BY MOST \$ PAST DUE)

Column	Actions	Function	Filter	Filter Values
<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 2px solid red; padding: 2px;">ADD COLUMNS</div> <div>EDIT REPORT DETAILS</div> <div>SHOW SQL</div> <div style="color: blue; font-weight: bold;">→ This report contains no data. Add some columns!</div> </div>				

The **Available Columns** screen will open. Initially, the available columns sort in alphabetical order. Each Data Model will typically have several columns available. Use the scroll bar on the right to scroll through the list of available columns. The **Search Columns** box may be helpful in selecting relevant columns for your report.

AVAILABLE COLUMNS Search Columns

Hold 'Ctrl' and click to select multiple columns.

Account #

Address

Address Line 2

Advertising Code 1

Advertising Code 2

Advertising Code 3

Advertising Code 4

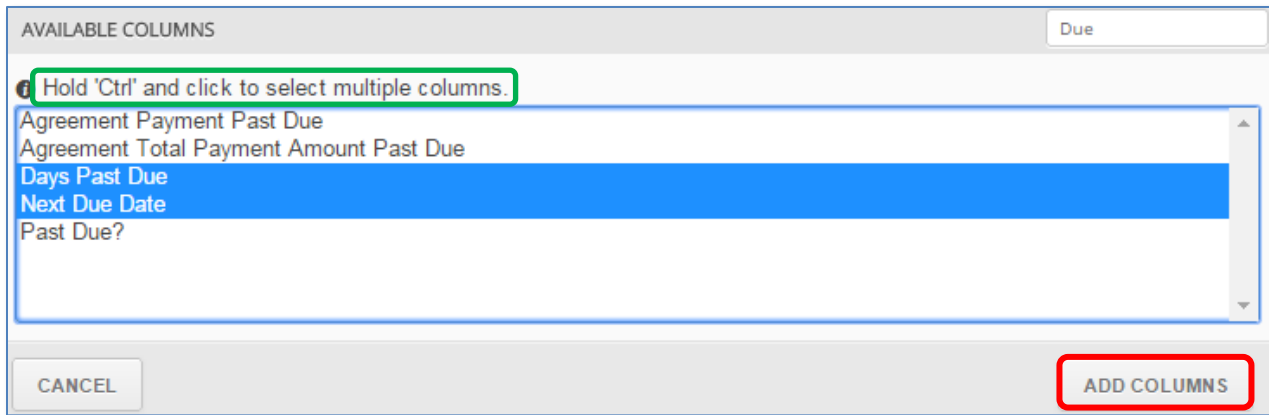
Agreement #

CANCEL

ADD COLUMNS

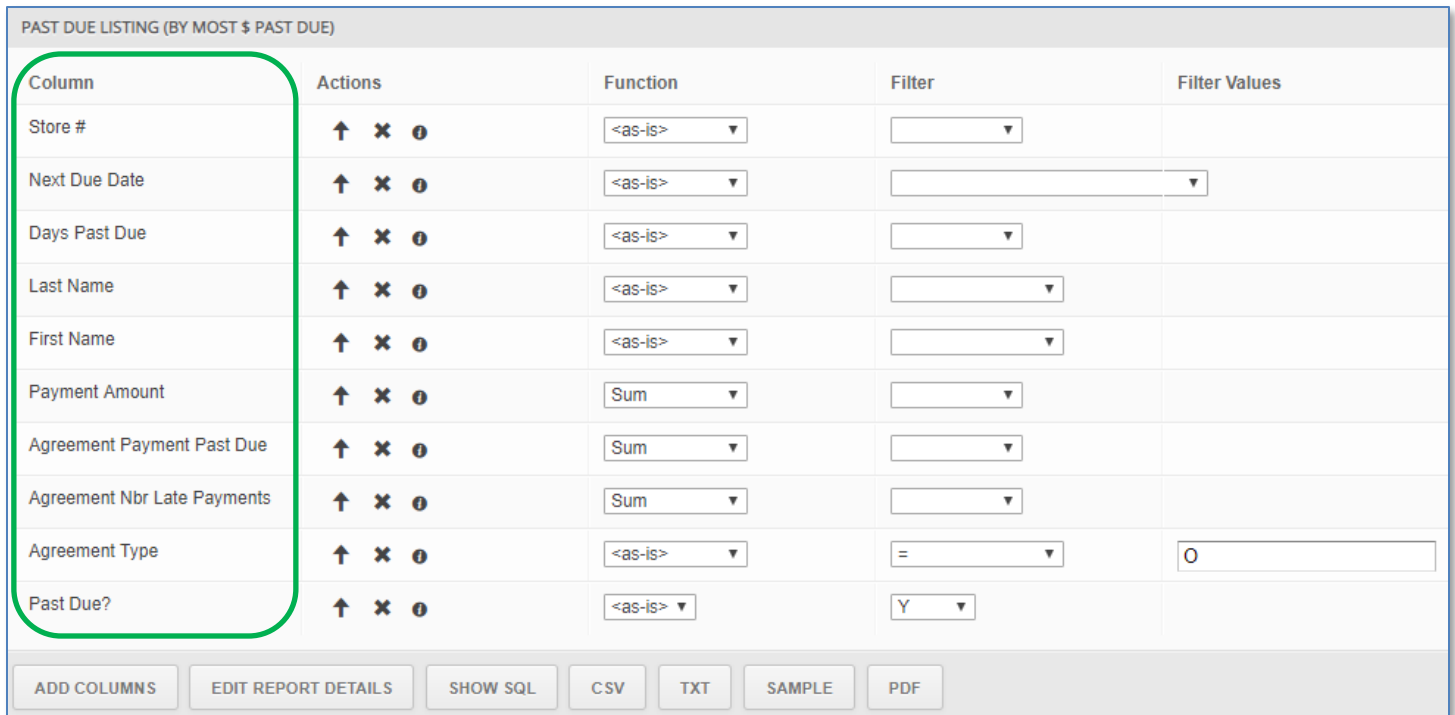
To select a column, click on the name of the column and it will be highlighted. Multiple columns may be selected by holding the **CTRL** key. After selecting the columns, click the **ADD COLUMNS** button to continue.

Please Note: You do not have to add all columns initially. You can come back and select more anytime.



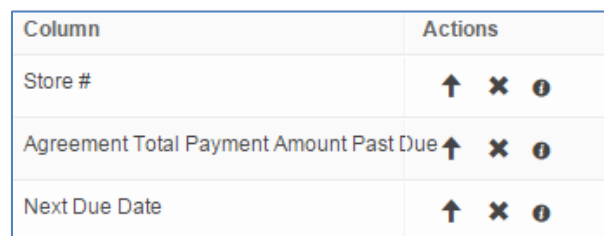
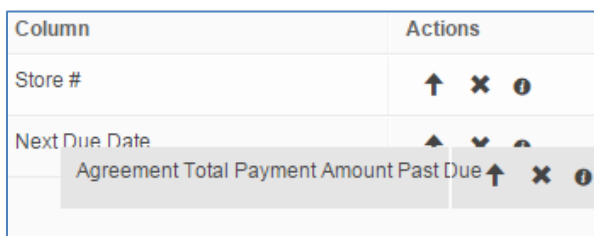
When finished adding **Columns**, all selected columns will be displayed on the left side of the screen. The columns will initially appear in the order that they were selected. However, the order can easily be changed. Furthermore, the columns are also initially defined with sensible default **Functions**.

Please Note: The functions are explained later within this documentation.



Moving Report Columns

To adjust or move the order of the columns, place the mouse on the line of the column to be moved, then **left-click** and **drag** it up or down to your desired location.



Sorting and Grouping Report Columns

The sorting and grouping of columns is designed to be simple. The reports are arranged from top to bottom by the columns in the order they appear on the FASTINFO report screen.

- The first column at the top of the screen will be the very first column to display on the report, and it serves as the initial sorting of the report. **It is imperative that the first column on the report is the one which the report will be sorted by first.**
- If the top two rows are filtered (e.g., store number and date), then the third column will actually be the initial sorted column on the report.

Example: In this scenario, the top four Columns from the FASTINFO screen will be reflected on the report as Store # (sorted), then by Agreement Total Payment Amount Past Due (sorted), then by Customer Last and First Name.

FASTINFO New Report Screen

Column	Actions	Function
Store #	↑ × 0	<35-IS>
Agreement Total Payment Amount Past Due	↓ × 0	Sum
Last Name	↑ × 0	<35-IS>
First Name	↑ × 0	<35-IS>

Sample Report PDF

Store #	Agreement Total Payment Amount Past Due	Last Name	First Name	Next Due Date
1	627.86	DAILY	ANGELA	04/11/2014
1	551.15	SANCHEZ	SUSIE	06/28/2014
1	526.61	MILLER	ALLEN	02/28/2014
1	513.23	CAHILL	BRAD	07/11/2014

Editing Report Details

Click on the **EDIT REPORT DETAILS** button to **Rename** the report, add a **Count Column** to the report, and add a **Report Description**.

Agreement Payment Past Due	↑ × 0	Sum	
Agreement Nbr Late Payments	↑ × 0	Sum	
Agreement Type	↑ × 0	<35-IS>	=
Past Due?	↑ × 0	<35-IS>	Y

ADD COLUMNS **EDIT REPORT DETAILS** SHOW SQL CSV TXT SAMPLE PDF

Adding a Report Description will provide the **Information** icon  to the FASTINFO Home screen which allows hovering the mouse to display the report description. Click **UPDATE** to save changes.

EDIT REPORT DETAILS

Report Name:

Add Count Column:




Report Description:

CANCEL **UPDATE**

Report Actions

Column	Actions	Function	Filter	Filter Values
Store #	↑ × ⓘ	<as-is>		
Agreement Total Payment Amount Past Due	↑ × ⓘ	Sum		
Last Name	↑ × ⓘ	<as-is>		

There are currently three **Action** icons available for each column defined on your report:

-  **Change Sort** – Will toggle the sorting arrow up and down to reflect the sorting to be in either ascending or descending order
-  **Delete Column** – Will remove the column from the report
-  **Information Icon** – When hovering the mouse, will provide a short description of the column that is selected

Applying Functions to Your FASTINFO Report

Column	Actions	Function	Filter	Filter Values
Store #	↑ × ⓘ	<as-is>		
Agreement Total Payment Amount Past Due	↑ × ⓘ	Sum		
Last Name	↑ × ⓘ	<as-is>		

The columns are initially loaded with the most commonly used **Default Functions** for that specific column. For example, columns that are more of an attribute column (store number or store name) default to **<as-is> Function**, and columns that count or calculate data (money) default to the **Sum Function**.

- There are drop-down options available for each column to allow selection of alternate functions. The functions available within each drop-down box are specific to each column. Changing defaults is typically done by advanced users.
- Example 1: A date column (e.g., **Next Due Date**) would have the following functions available:
 - <as-is> – Displays the actual date (most often the default)
 - Count Distinct – Counts each date instance as “1” and is more practical if generating a CSV file
 - Year – Displays the year of the date
 - Month – Displays the month of the date
 - Day of Week – Displays the day of the week of the date
- Example 2: A counting column (e.g., **Payment Amount** or **Number of Late Payments**) can have the following functions available:
 - <as-is> – Displays the actual count
 - Sum – Sums the data that needs to be counted (most often the default)
 - Avg – Averages the data that needs to be counted
 - Min – Displays the lowest amount
 - Max – Displays the highest amount
 - Count Distinct – Counts each instance of the amount and is more practical if generating a CSV file

Applying Filter to Your FASTINFO Report



Filters are used to reduce the number of rows in a report. This allows access to more specific information like a specific date, a range of dates, etc.

- To apply filters, open the drop-down list and select a **Filter** to use for the report. A box will then open to the right of the filter to enter the **Filter Value(s)**.
Please Note: If more than one filter value is used (e.g., selecting more than one store), use the semi-colon (;) with no spaces to separate the values. For example, stores 1, 2, and 3 will be entered into the Filter Value section as "1;2;3."
- Often, when applying a filter, the screen will display a red error message stating that the report contains errors. This occurs because a **Filter Value** or the use of the **Function** within the SQL logic is not complete or has errors. Usually, the column that has the issue is highlighted in red and the Output option buttons go away. The error will need to be resolved to be able to generate the report.

This report contains errors!

- With FASTINFO, all column filter options are put together with the use of the SQL **"AND"** statement.
 - Example: In the above screenshot, the reports information will be filtered to include stores 1 through 3 **and** customers that have had made late payments between 1 and 10 times.*
 - Please Note: If building a report that would contain information using an **"OR"** function, such as Store Names (Example: Wichita OR Derby), both store names would need to be included in order to collect the information for both stores and generate the report into the CSV. The data can be moved into Excel (or any other comparable spreadsheet software) where expanded tools can be used to further filter the data.*
- Date Columns:** Generally based on the current system date.
- Filter Options:** Depending on Column "Type," there are many filter options available. Below are a few common filter options.
Please Note: This is not an all-inclusive list.

Equals	Is One Of	End of Last Week
Not Equal To	Is Not One Of	End of Last Month
Greater Than	Begins With	End of Last Year
Less Than	Ends With	During This Week
Greater Than or Equal To	Yes	During Last Week
Less Than or Equal To	No	During Last Month
Between	Yes or No	During Last 90 Days
Contains	Is Today	During Past 13 Weeks
Does Not Contain	Was Yesterday	Past 13 Saturdays

FASTINFO Output Buttons and the Show SQL Button

- **Run (Generate) Output Buttons:** Clicking on one of the **CSV**, **TXT**, **SAMPLE**, or **PDF** buttons will generate the reports within the selected format, either by the browser downloading the specific format or displaying it on the screen. The unique advantage of having these buttons available from the **Report Creation** screen is that a report can easily be generated on the fly to ensure the intended results are as expected. The Output Run options are also available from the main FASTINFO Home screen.




- **CSV** – Allows the ability to generate the report to a CSV file. Generating in this format will allow the report information to be brought into Excel, which allows for greater sorting or manipulating of the report data. *Please Note: There may be limitations in the amount of data that can be handled by CSV (Excel) depending upon how much data/columns are being selected.*
- **TXT** – Allows the ability to generate the report into a plain text format.
- **SAMPLE** – Opens the report within the cynergi|suite HTML screen. Generating with this option will display the report in a format that is similar to many of the cynergi|suite screens.
- **PDF** – Allows the ability to generate the report in a PDF format. Generating in this format will provide for ease of printing, saving, or emailing the report. *Please Note: The PDF output option is only available for reports with 10 or fewer columns. Furthermore, the maximum number of rows generated to PDF is 1,000 rows, or roughly 33 pages in length. The **PDF** button will disappear if the maximums are exceeded.*
- **SHOW SQL** – Clicking the **SHOW SQL** button displays the SQL that FASTINFO runs against the database to produce the report. This will generally be used by more advanced users or with Support to assist with errors that occur while creating a report. *Please Note: This button does not provide the ability to directly edit the SQL statements.*

Other FASTINFO Report Creation Points

- While creating or editing FASTINFO reports, the reports automatically save as you go (a save button is not needed).
- Although unlikely, it is possible to add the same column(s) more than once in a report if an additional function of that column is needed.
 - Example: If a Summary Date has a column that uses the function <as-is> and the filter is “was Yesterday,” you can also have another Summary Date column that uses the function “Year.”
- From the FASTINFO Home Screen, a report may be deleted by clicking the **DELETE** button. A confirmation prompt will be shown prior to the deletion.
 - *Please Note: Custom Reports may be deleted. Supplied Reports may not be deleted.*
- The listing of reports displays in alphabetical order (numbers coming before letters).
- FASTINFO is a basic custom report generation tool that is included with the cynergi|suite store system. The ability to generate reports with calculations (tax, sub-total generation, totals by Locations/Groups, etc.) or generating by Location Groups or specific variations of existing cynergi|suite or FASTINFO reports is limited.
 - These capabilities may be possible with FASTINFO by selecting the option of generating the report into a CSV file and using Excel (or any other comparable spreadsheet software).

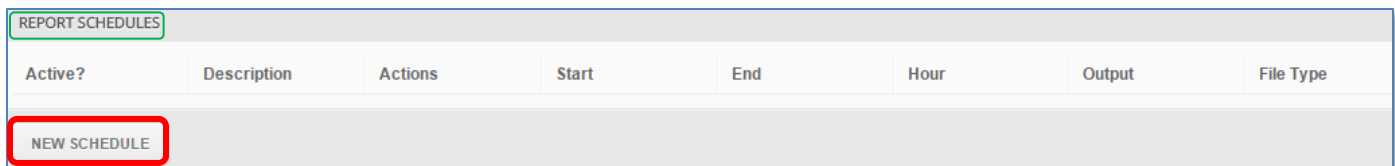
How to Clone an Existing FASTINFO Report

Existing **Supplied Reports** and **Custom Reports** may be “Cloned.” This provides the option to start with an existing report that may have a similar foundation and modify it to create a new report.

- From the Home screen, click the  icon on a report you want to clone.
- The **Cloned** report will appear under **Customer Reports** titled “**A clone of {report name}**” with the date and time the report was cloned. Most generally, these reports will appear closer to the top of the report list depending upon the names of the other reports.
 - Click on the report, then click **EDIT REPORT DETAILS** to **rename** the report.
- Adding columns, sorting, moving, and editing, as well as applying functions and filters (shown above) applies to the cloned reports.

Scheduling FASTINFO Reports

The **Report Schedules** section is located at the bottom of the screen within each individual report.



Click **NEW SCHEDULE** to access the scheduling of the report. The **New Report Schedule** screen will open.

Start Date:

End Type:

Hour To Start:

Hour To Stop:

File Type:

Distribution:

Frequency:

Every X Hours:

INACTIVE

There are multiple options available within the scheduling parameters. Furthermore, selections vary depending upon the schedule selected.

Schedule Frequencies: There are four schedule frequencies available: **Hourly**, **Daily**, **Weekly**, or **Monthly**. Cells outlined in Red are required before a schedule can be created.

- Depending upon the frequency selected, there may be additional options available.

Other Scheduling Definition: There are a few additional options that apply to all four scheduling frequencies that must be defined. Cells outlined in Red during the creation of the frequency are required before you can create the schedule.

- **Start Date** – Select a starting date of the report
- **End Type** – Select Never, On Date, or After # Occurrences to never end, specify an actual last date, or specify a number of occurrences
- **Hour To Start** – Select the time to generate the report
- **File Type** – Select the file type in which to generate the report: Text, CSV, or PDF
- **Distribution** – Select Email or Reportal
 - If **Email** is selected, the **Email Targets** field opens, allowing input of the email addresses to which the report will be sent.
 - If **Reportal** is selected, the **Store Split** and **Output Folder** fields appear, where you can select Consolidated, Distribute to Stores, or Split by Store, Single Directory, as well as an output folder (if Distribute to Stores is selected, there will not be the **Output Folder** option).

Email

Reportal




- **Active/Inactive Toggle** – Click the **ACTIVE/INACTIVE** toggle to set the schedule from Active to Inactive as needed.



Upon completing all required options, click the **CREATE SCHEDULE** button to save the schedule.

Multiple schedules for a report may be created. All schedules created will appear in the **Report Schedules** list.

- Any scheduled report can be generated immediately by clicking the **Envelope** icon for email or **Paper** icon for Reportal.
- Delete a schedule by clicking the “X.”
- Hover the mouse over the **Information** icon to see the report frequency.

Active?	Description	Actions	Start	End	Hour	Output	File Type
Yes	Weekly on Mon	  	2015-04-27	Never	5 AM	Email	TXT

FASTINFO Security

FASTINFO uses the cynergi|suite **Alt Stores** and **Alt Div/Rg** fields on the second screen of Employee Records (**EMPMNT**). Users who are restricted to one store, or a subgroup of stores, will only see the data for those same stores in FASTINFO reports. These restricted users are also limited to using FASTINFO reports that include a store number column.

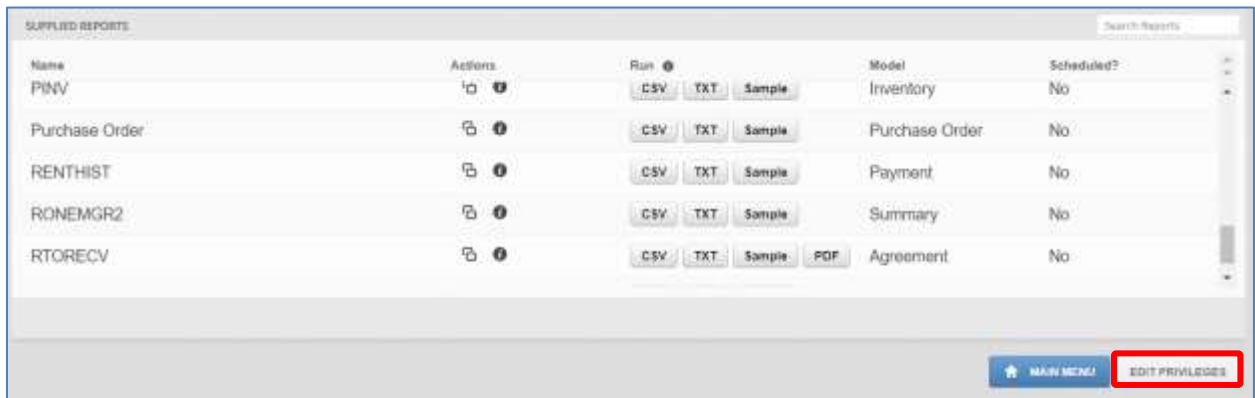
FASTINFO Privilege Levels

There are four Levels of FASTINFO capabilities, determined by the User’s “Privileges” in FASTINFO:

- **Administrator** – Administrators can set up security for all users and have the same rights of Producers.
- **Producer** – Producers can create, modify and delete custom FASTINFO reports. Producers can schedule reports, view existing schedules, and have all the rights of Consumers.
- **Consumer** – Consumers can run FASTINFO reports interactively. They do not have the ability to create FASTINFO reports.
- **None** – These Users cannot use FASTINFO at all.

Edit Privilege Levels

- From the FASTINFO Home Page, click on the **EDIT PRIVILEGES** button at the bottom right corner of the screen.



- Select the security level from the Privilege Level drop-down list for the Department that you wish to change security.
Please Note: Once a Department’s privileges have been updated, please clear the cache in the browser.
- Initially, upon distribution of this feature, every department is configured with the users Privilege Level as Administrator. However, if a user in cynergi|suite is restricted in to a single store, or subgroup of stores, that user would initially default to Consumer rights only.

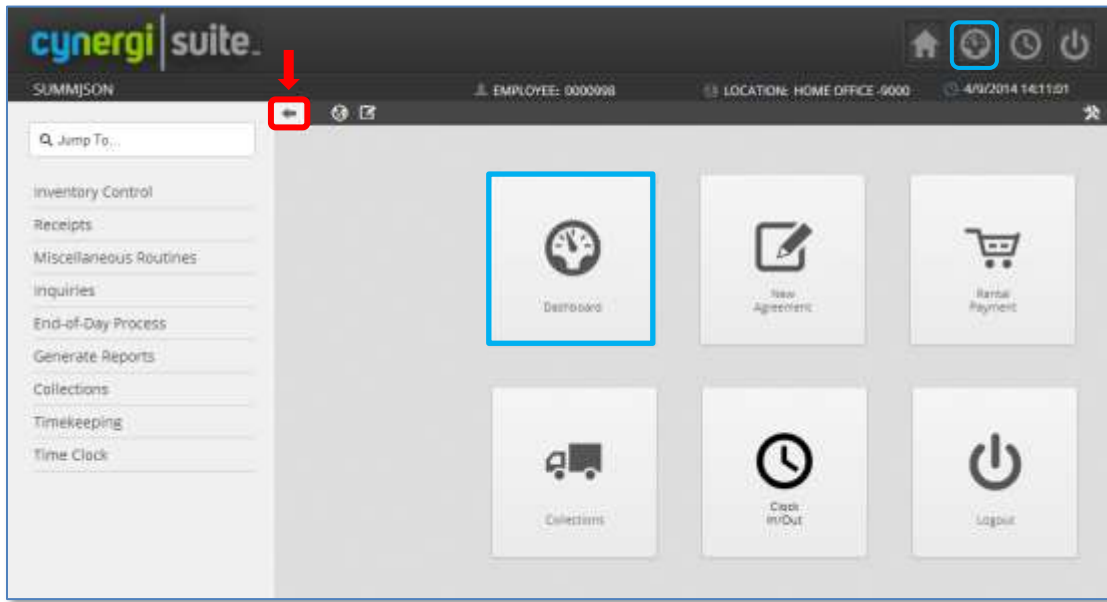
Example: Within the FASTINFO Privileges screen, the Account Manager Privilege is set as **Administrator** level. At the store, Bob’s user account 123 is assigned to Store 10, and it belongs to Department “AM” which has “Alt Stores” set to “N” (none). Because Bob is restricted to Store 10 in cynergi|suite, he is assigned a “Consumer” Privilege Level in FASTINFO and not at an “Administrator” Privilege.

Department	Description	Privilege Level
AM	ACCOUNT MGR	Consumer
CO	COLLECTIONS	Consumer
DE	DELIVERY	None
DM	DISTRICT MGR	Producer
MG	MANAGEMENT	Administrator
OF	OFFICE	Producer
SA	SALES ASSOCI	Producer
SM	STORE MANAGE	Producer
WH	WAREHOUSE	None

Dashboard

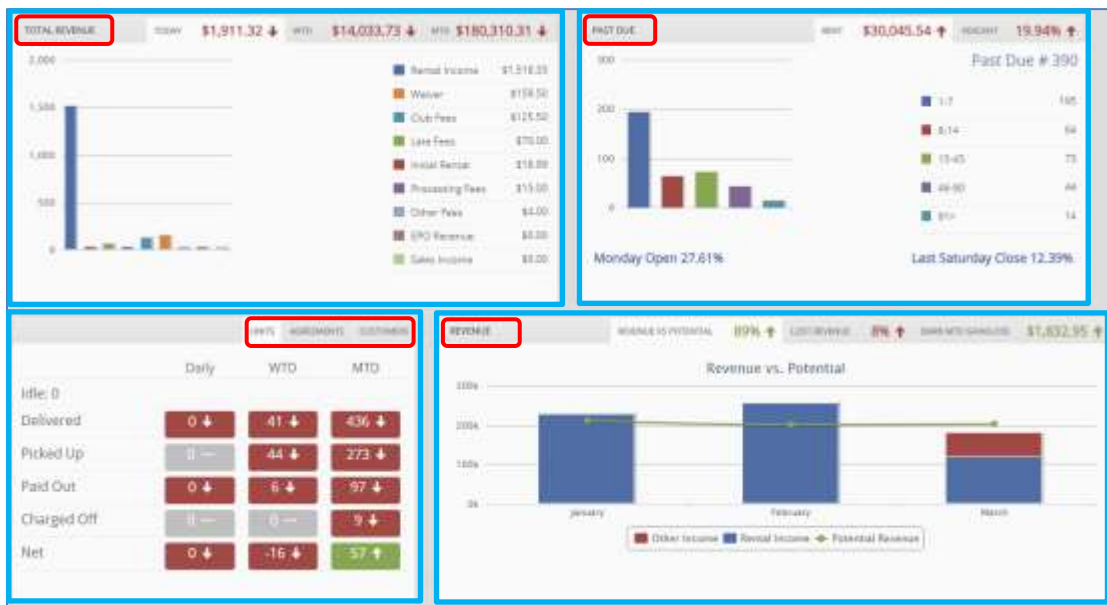
The cynergi|suite Dashboard provides a quick snapshot view of several important areas that are typically measured in the daily business cycle. To access the Dashboard, click on the **Dashboard** icon at the top right corner of the screen, or click on the large **Dashboard** button in the center section of the home screen.

Please Note: Depending on monitor type, it may be necessary to minimize the drop-down accordion menu. This will allow the Dashboard to open to Full Screen. This can be done by clicking on the arrow to the side of the Menu.



There are four major components that make up the Dashboard:

- **TOTAL REVENUE** – Revenue brought in Today, Week to Date (WTD), and Month to Date (MTD)
- **PAST DUE** – Rent in Dollars and Percent of Customers Past Due
- **UNITS/AGREEMENTS/CUSTOMERS** – Gain/Loss Daily, Week to Date, and Month to Date
- **REVENUE** – Potential, Lost Revenue, and Standard Monthly Revenue (SMRR) Gain/Loss



Total Revenue

The **TOTAL REVENUE** section of the Dashboard shows the total revenue collected for the current business day (**TODAY**), the Week to Date (**WTD**), and the Month to Date (**MTD**). The Revenue is broken out in the categories shown on the right side. A Bar Graph displays the same information on the left side.

Revenue Detailed Breakout

- **Rental Income** = Total Dollars in “Rent” collected
- **Sales Income** = Total Dollars in “Sales, Special Sales” collected
- **EPO Revenue** = Total Dollars in “Early PayOff” collected
- **Club Fees** = Total Dollars in “Club” membership fees collected
- **Initial Rental** = Total Dollars of “Initial” Rent
- **Late Fees** = Total Dollars in “Late Fees” collected
- **Other Fees** = Total Dollars in “Deposit Amt, Other Fees Paid, Misc Charges, Return Check Charge, In-Home Collections, Down Payment Amt” collected
- **Processing Fees** = Total Dollars in “Processing Fees” collected
- **Waiver Fees** = Total Dollars in “Waiver” (GRP) fees collected

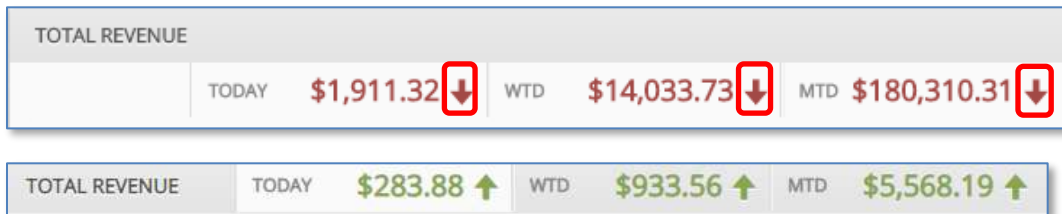
The Revenue Categories are sorted in order of the Amount Collected. They can change positions during the day.



TOTAL REVENUE has three viewing options available. You can change the view from **TODAY** to **WTD** or to **MTD** by clicking on the tabs at the top right of the screen.



Revenue collected amounts for **TODAY**, **WTD**, and **MTD** will be displayed in Green or Red with a corresponding arrow up or down to show if the figures are higher or lower than the same day of the previous week or month.



Each arrow signifies whether the amount of revenue collected is up or down for **TODAY**, **WTD**, or **MTD**. For example, the revenue collected for **TODAY** is compared to the same day of the previous week's *close*. **WTD** and **MTD** work the same way. **MTD** is comparing to the same day of the previous month, such as the first Monday of the month to last month's first Monday's *close*. **WTD** view is the same as **TODAY**, only the amounts shown are cumulative from the first day of the week (Sunday) to the current day of the week.



MTD view is the same as **TODAY**, only the amounts shown are cumulative from the first day of the month to the current day of the month.



Past Due

PAST DUE (RENT) view will show the number of past due rental agreements broken out by the categories on the right side. A Bar Graph displays the same information by percentage on the left side.

Past Due percentage and number Past Due will be displayed in Green or Red with corresponding arrow up or down to show if the figures are higher or lower than the same day of the week for the previous week (if today is Monday, it is comparing to last Monday's close). The amount of past due rent (Float) is shown on the top right.



PAST DUE (PERCENT) view will show percentage of customers past due broken out by the categories on the right side. A Pie Chart displays the same information by percentage on the left side.

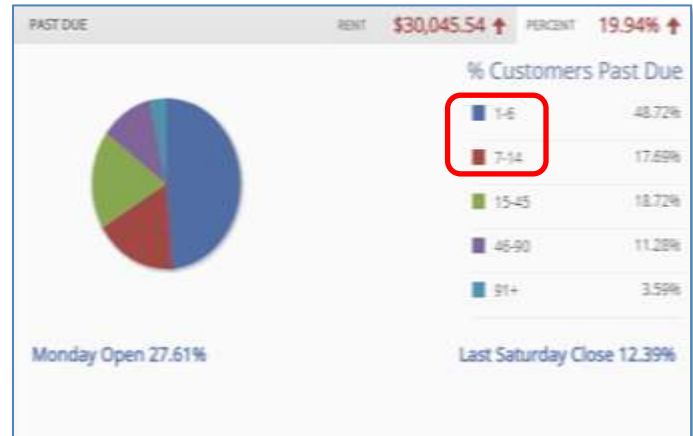


There are two *PAST DUE* category options available for the **PAST DUE** screen. To change categories, type the command **PDUEMNT** in the *Jump-To* box. Select an **Effective Date** and then select the appropriate set of *Past Due Ranges*. Click **SAVE** to set the selection as the new default categories.

Please Note: An employee must have the proper security to execute the command **PDUEMNT**.

Please Note: The only difference in Past Due category options are the first two past due ranges (1-7, 8-14 vs. 1-6, 7-14). It is recommended set this once and leave it as the default.

You must run **PDUEMNT** and select the other past due range to change the view back.



Security Maintenance (SECMNT) Setup to Allow Employee to Process PDUEMNT Command

To set security of the command **PDUEMNT**, go to Security Maintenance (**SECMNT**) for an employee and the **Common Programs** screen. The **Control Maint** security flag default is No. Change to **Yes** to allow an employee to execute the **PDUEMNT** command.

Units/Agreements/Customers

UNITS view will show inventory unit activity for the current business day (Daily), Week to Date (WTD), and Month to Date (MTD).

Unit Detailed Breakout

- **Delivered** – Inventory units placed on rent
- **Picked Up** – Inventory units returned/picked up
- **Paid Out** – Inventory units paid out/final payment and Early Payouts (EPO)
- **Charged Off** – Inventory units charged off (Skip, Stolen, etc.)
- **Net** – The gain or loss of units on rent for the business day

Positive numbers are shown in green with an up arrow and negative numbers are shown in red with a down arrow.

	Daily	WTD	MTD
Idle: 0			
Delivered	0 ↓	41 ↓	436 ↓
Picked Up	0 ...	44 ↓	273 ↓
Paid Out	0 ↓	6 ↓	97 ↓
Charged Off	0 ...	0 ...	9 ↓
Net	0 ↓	-16 ↓	57 ↑

AGREEMENTS view will show agreement activity for the current business day (Daily), Week to Date (WTD), and Month to Date (MTD). The pie chart gives a count and percent of active agreements that are enrolled in Recurring Payments.

Agreement Detailed Breakout

- **Delivered** – New Rental Agreements activated
- **Picked Up** – Rental Agreements returned/picked up
- **Paid Out** – Rental Agreements paid out/final payment and Early Payouts (EPO)
- **Charged Off** – Rental Agreements charged off (Skip, Stolen, etc.)
- **Net** – The gain or loss of customers for the business day
- **Pending** – The number of pending rental agreements (shown in the red dotted box below)

Positive numbers are shown in green with an up arrow and negative numbers are shown in red with a down arrow.

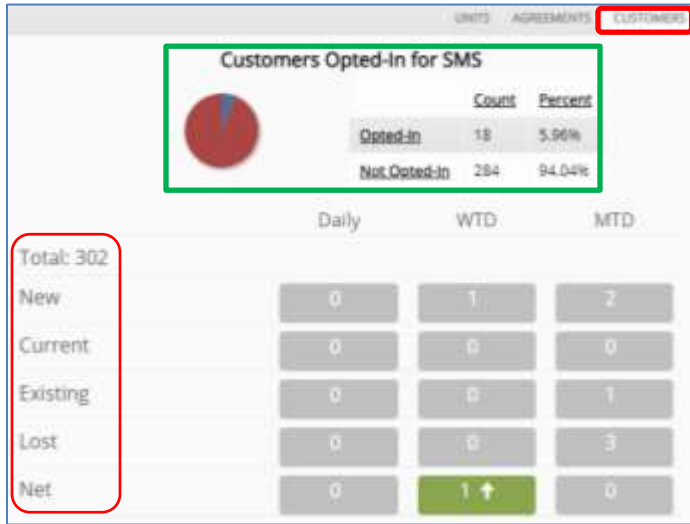
	Daily	WTD	MTD									
Agreements with Recurring Payment Method <table border="1"> <thead> <tr> <th></th> <th>Count</th> <th>Percent</th> </tr> </thead> <tbody> <tr> <td>Recurring Payment</td> <td>0</td> <td>0%</td> </tr> <tr> <td>None</td> <td>377</td> <td>100%</td> </tr> </tbody> </table>					Count	Percent	Recurring Payment	0	0%	None	377	100%
	Count	Percent										
Recurring Payment	0	0%										
None	377	100%										
Total: 377	Pending: 0	Pending: 0	Pending: 0									
Delivered	0	2	5									
Picked Up	0	0	0									
Paid Out	0	0	3									
Charged Off	0	0	0									
Net	0	2 ↑	2 ↑									

CUSTOMERS view will show customer activity for the current business day (Daily), Week to Date (WTD), and Month to Date (MTD). The pie chart gives a count and percent of active RTO customers that are opted-in for SMS text messaging.

Customer Activity Detailed Breakout

- **New** = New Customers who have not rented before today
- **Current** = Customers who are currently renting and added a new agreement today
- **Existing** = Customers that have rented before but did not have an existing agreement until today
- **Lost** = Customers that have become inactive and are no longer renting due to Pay Out/Final Payment, Early Payouts (EPO), Returns, and or Charge Offs (Skip, Stolen, etc.)
- **Net** = The Gain or Loss of Customers

Positive numbers are shown in green with an up arrow and negative numbers are shown in red with a down arrow.



Revenue

REVENUE view has tabs for **Revenue vs Potential**, **Lost Revenue**, and **SMRR MTD Gain/Loss** (SMRR = Standard Monthly Rental Revenue). Under the **Revenue vs Potential** and **SMRR MTD Gain/Loss** tabs, a bar graph displays the last three months data. Amounts will be displayed in Green or Red with a corresponding up/down arrow indicating when the figures are higher or lower than the previous month.



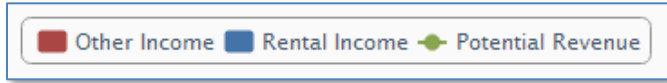
Red = Other Income

Blue = Actual Rental Income

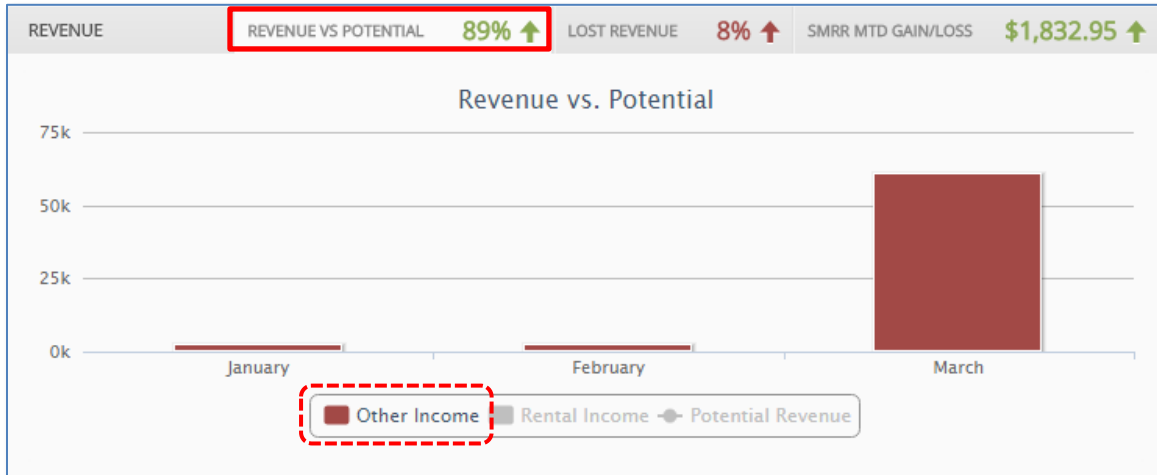
Green = Potential Rental Income

It is possible for Rental Income to surpass the Potential when a higher amount of rental revenue is collected (typically, when customers pay further ahead than their typical payment amounts).

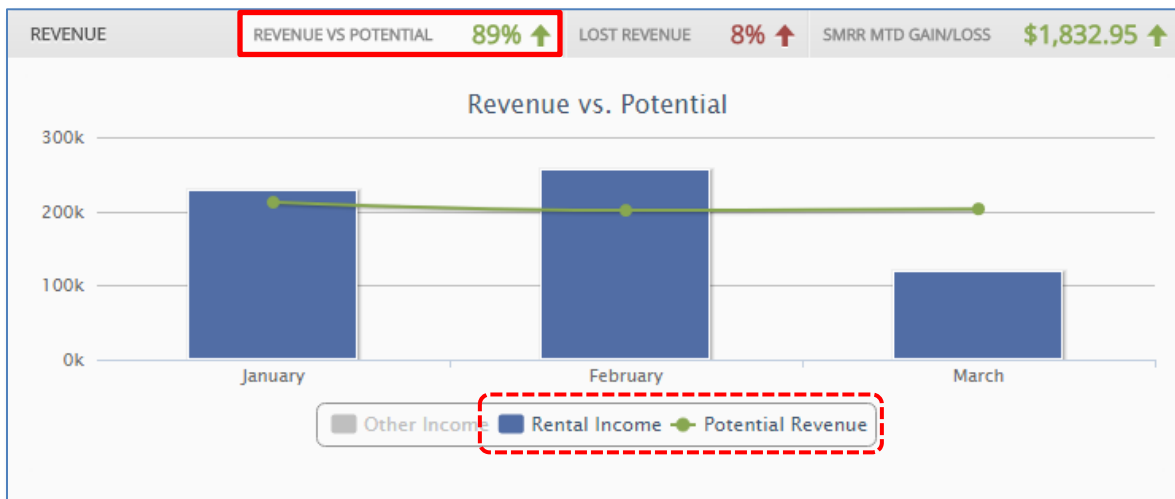
Different views may be opened by clicking on the legend descriptions “Other Income,” “Rental Income,” or “Potential Revenue” at the bottom of the screen to select or deselect the category.



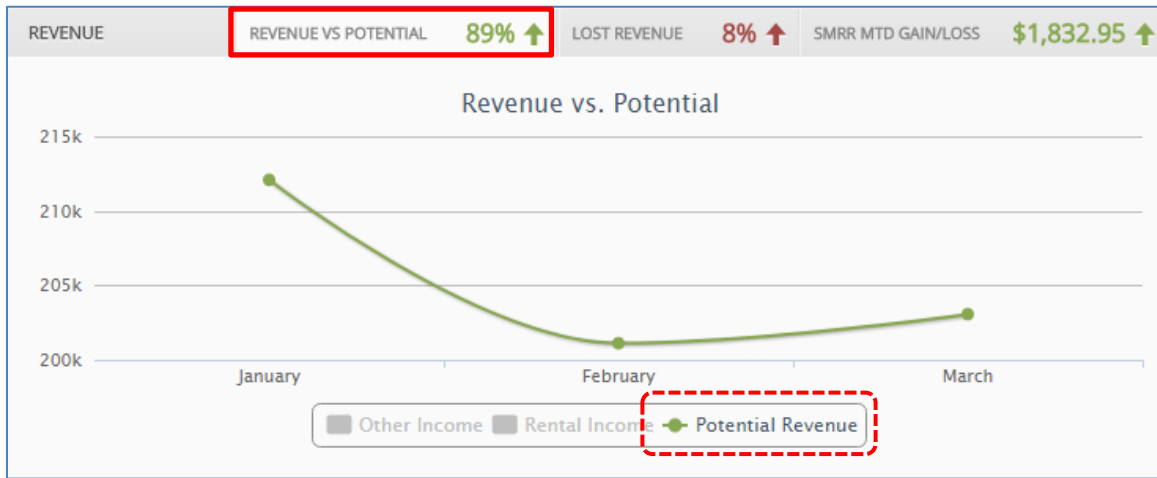
Example of REVENUE VS POTENTIAL “Other Income”



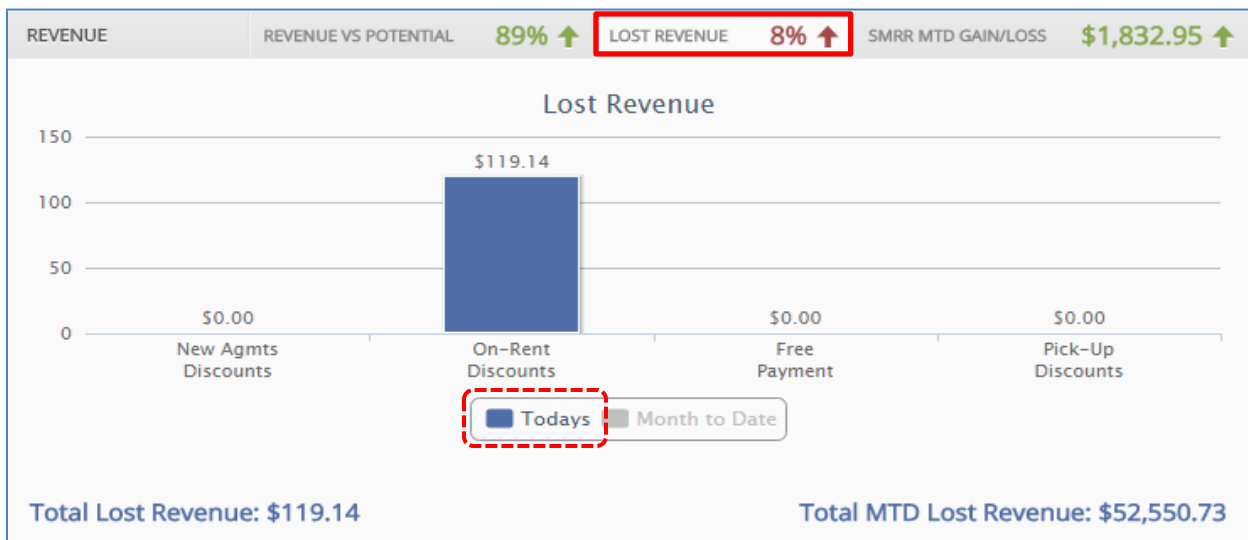
Example of REVENUE VS POTENTIAL “Rental Income” and “Potential Revenue”



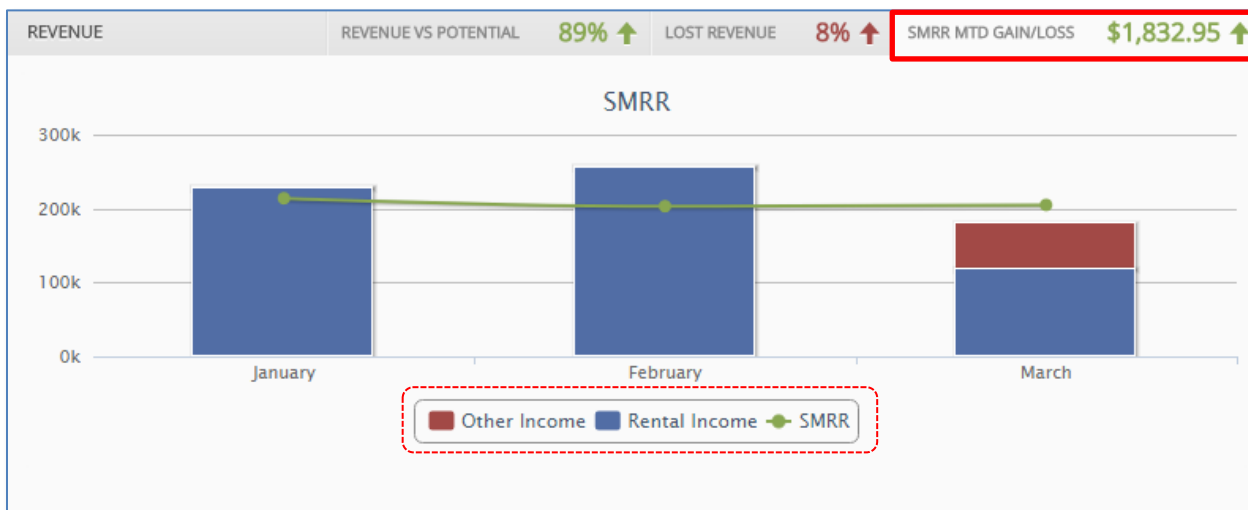
Example of REVENUE VS POTENTIAL “Potential Revenue”



Example of LOST REVENUE “Todays”



Example of SMRR MTD GAIN/LOSS



Customer Statistics Report

The Customer Statistics Report (**CSTATRPT**) is a snapshot report that shows life to date Customer and Agreement information by store(s) and account manager(s) (route). Three filter options are available: Detail, Summary, and Recap. The recommended frequency is Weekly or Monthly. Reports print landscape on legal size paper. They may be added to the report Spooler or manually generated.

The report may be generated manually by typing **CSTATRPT** in the **Jump-To** box from the main cynergi|suite screen.



Report Filter Options

Report Type

- **Detail** – Displays all agreements for selected store(s) and account manager(s) by customer
- **Summary** – Displays customer information for all agreements for selected store(s) and account manager(s)
- **Recap** – Displays selected account manager totals for the store selected

Location – A single store or multiple stores may be selected

Acct Mgr – A single route or multiple routes may be selected

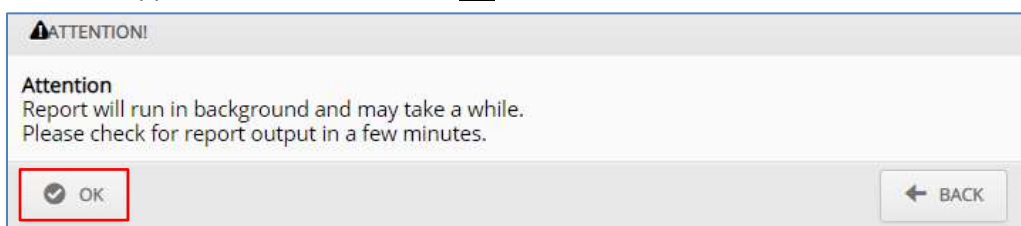
Only Include Customers with Active Agreements

- **No** – Includes all active and in-active customers
- **Yes** – Includes only active customers

A screenshot of the 'CSTATRPT REPORT' filter options form. The form contains several fields with dropdown menus and input boxes:

- Report Type:** Dropdown menu set to 'Detail'.
- Select by Loc or Loc Groups:** Dropdown menu set to 'No'.
- Location Selection:** Dropdown menu set to 'I-Select by 10 Locs/Groups'.
- Starting Loc Group:** Input field with '0'.
- Ending Loc Group:** Input field with '0'.
- Acct Mgr:** Dropdown menu set to 'All'.
- Only Include Customers with Active Agreements:** Dropdown menu set to 'No'.

If the report is run on demand, it will run in the background and may take a several seconds to generate. The message below will appear on the screen. Click **OK** to continue.



Detail Report: Details by Customer/Agreement

Actual Rental Rates: The payment amount for the agreement based on the payment terms. Columns for Weekly, Semi-monthly, and Monthly. There is an asterisk (*) next to the rate indicating the current payment terms. If there is no asterisk, then the agreement's payment terms are Bi-weekly.

Accum Rent: Accumulated Rent = Contract Amount – Contract Balance

To-Date Rent Differ: Rent Differential to-date = Accumulated Rent – Theoretical Rent
(Theoretical rent = Terms gone by * Agreement payment amount)

Terms gone by is based on the payment terms.

- **Weekly:** Difference in # of days between agreement contract date and next due date ÷ 7
- **Bi-weekly:** Difference in # of days between agreement contract date and next due date ÷ 14
- **Monthly:** Difference in # of months between agreement contract date and next due date
- **Semi-Monthly:** Difference in # of months between agreement contract date and next due date * 2

Remaining Cost: The TOTAL book value of each inventory item on the agreement

Free Time Days: The total number of days given as free time (uses Discount code)
(Free Time Days = Receipt amount taken as payment form 8 ÷ Daily rate)

Days Ext.: The total number of days the payment is extended (uses Due Date Move Code)

(Days Ext. = Actual Advance – Proper Advance where
Actual Advance = Next due date – Date payment due
Proper Advance = Payment amount ÷ Daily rate)

Cust Receivable: Customer "total" amount of Customer Receivable credit

- Overpaid will be negative (- amt)
- Underpaid will be positive (+ amt)

Est. Payout Date: Estimated Payout Date = Number of days left to pay + Today's date
(*Number of days left to pay = Contract balance ÷ Daily rate*)

Times Past Due: The ranges are the Past Due Category ranges set up in the **AMRNKMNT** (Control Records). The S/S column will show "1" if the closed reason is Skip or Stolen.

Pd Wv: Paid Waiver (GRP), **Y** or **N** will reflect whether the customer pays Waiver/GRP on the agreement

Defrd Fees: Total fees that have been deferred: Installation, In-Home Collection, Processing, Delivery, Late, and Waiver/GRP

Club Awards M: Either **Y** or **N** depending on whether or not this is a club agreement

Club Awards Ern: Bonus Bucks that have been earned

Club Awards Usd: Bonus Bucks that have been used

Club Awards Left: Bonus Bucks available to use

Customer Total (if there is more than one agreement for the customer)

Route Total, Store Total and Final Total: Orig Rate, Actual Rental Rates, Accum Rent, To-Date Rent Differ, and Remaining Cost are shown in whole dollars

Summary Report: Details by Customer/Agreement

This provides the same information as the Detail Report, with the exception of the specific Agreement/Ticket columns: Agreement #, Agreement Date, Next Due Date, and Est. Payout Date.

Recap Report: Totals by Route

- **Paid Waiver:** Paid Waiver (GRP) is the count of the number of Agreements/Tickets that are supposed to collect Waiver/GRP
- **Deferred Fees Instl:** The amount of Installation Fees deferred
- **Deferred Fees Deliv:** The amount of Delivery Fees deferred
- **Deferred Fees Proc:** The amount of Processing Fees deferred
- **Deferred Fees GRP:** The amount of Waiver/GRP Fees deferred
- **Deferred Fees Reinst:** The amount of Late (reinstate) Fees deferred
- **Deferred Fees IHC:** The amount of In-Home Collection Fees deferred
- **Club Awards Mem:** The number of active club agreements

Report Examples

Detail Report

Run Date: 06/21/17 Time: 9:15:11		High Touch CUSTOMER STATISTICS 1 Wichita SELECTED BY ACCT MGRS: all SELECT ACTIVE ONLY: Y DETAIL REPORT															PAGE: 23 CSTAT07F																
Customer	Agreement	ACN	USR	Agreement Date	Pkg Code	Actual Rate	Instal Rate	Recal Rate	Accum Rate	To-Date Diff	Remain Time	Free Time	Days Ext.	Cost Recv	Next Due Date	Est. Payout Date	Days Past Due	Times Past Due	1-7	8-14	15+	5/3 Waive	Defr Fee	Club Awards Mem	Instl	Deliv	Proc	IHC	Mem	Err	Doc	Int	
ROUTE, MICKEY	117847	1	3	10/08/15		28.99*	84.23	128.88	331.50	4.78-	70.42	0	2		12/26/15	12/24/16	543	4	1	0	0	0	Y										
	117848	1	2	10/08/15		28.99*	84.11	128.28	373.08	3.13-	0	2			12/26/15	1/01/17	543	6	0	0	0	0	Y										
Customer Total:		2	5			54.98	119.01	238.11	604.58	11.97-	0	4					0	1	0	0	0	0											
TOP, JJ	118979	1	2	6/18/14		28.24	86.81	119.82*	1988.68	228.44-	0	48			2/18/16	6/01/16	482	6	0	7	0	0	Y	8.00									
VIEW, JONIC	117790	1	1	6/25/13		16.99*	80.08	143.17	571.81	0.34	373.34	0	0		2/12/16	8/02/16	464	2	0	0	0	0	Y										
	118079	1	3	11/21/15		16.99*	90.00	160.17	582.00	0.16	407.60	0	0		3/12/16	9/24/16	486	2	0	0	0	0	Y										
Customer Total:		2	2			78.88	160.14	320.14	1483.91	3.22	0	0					0	0	0	0	0	0											
Route Total:		6	9			138	334	672	4,088	321-	849	0	48				19	6	7	0	0	0		8.00									
Store Total:		880	781		14	13,681	29,340	89,083	364,942	3,043-	138,188	2316	832	827.81-			3480	424	192	0	189.00	432	432										
Final Total:		880	781		14	13,681	29,340	89,083	364,942	3,043-	138,188	2316	832	827.81-			3480	424	192	0	189.00	432	432										

* = Current Payment Mode (W, F, M). If Biweekly, there's no *
TIME FINISHED:09:15:11

Summary Report

Run Date: 06/21/17 Time: 9:26:45		High Touch CUSTOMER STATISTICS 1 Wichita SELECTED BY ACCT MGRS: all SELECT ACTIVE ONLY: Y SUMMARY REPORT															PAGE: 9 CSTAT07F																
Customer	Agreement	ACN	USR	Agreement Date	Pkg Code	Actual Rate	Instal Rate	Recal Rate	Accum Rate	To-Date Diff	Remain Time	Free Time	Days Ext.	Cost Recv	Next Due Date	Est. Payout Date	Days Past Due	Times Past Due	1-7	8-14	15+	5/3 Waive	Defr Fee	Club Awards Mem	Instl	Deliv	Proc	IHC	Mem	Err	Doc	Int	
ROUTE, MICKEY	2	5				54.99	119.08	238.11	604.58	11.97-	70.42	0	4				0	1	0	0	0	0											
TOP, JJ	1	2				28.24	86.81	119.82	1989.68	228.44-	0	48					0	0	7	0	0	0	Y	8.00									
VIEW, JONIC	1	2				16.99	80.08	143.16	582.00	0.32	373.34	0	0				0	0	0	0	0	0	Y										
Route Total:		6	9			138	334	672	4,088	321-	849	0	48				19	6	7	0	0	0		8.00									
Store Total:		880	781		14	13,681	29,340	89,083	364,942	3,043-	138,188	2316	832	827.81-			3480	424	192	0	189.00	432	432										
Final Total:		880	781		14	13,681	29,340	89,083	364,942	3,043-	138,188	2316	832	827.81-			3480	424	192	0	189.00	432	432										

TIME FINISHED:09:26:45

Recap Report

Run Date: 06/21/17 Time: 9:19:51		High Touch CUSTOMER STATISTICS WVCAZ REPORT 1 Wichita SELECTED BY ACCT MGRS: all SELECT ACTIVE ONLY: Y															PAGE: 1 CSTAT07F																
Route	Customer #	# of Agr	ACN	WOM	Actual Rate	Instal Rate	Recal Rate	Accum Rate	To-Date Diff	Remain Time	Free Time	Days Ext.	Cost Recv	Times Past Due	1-7	8-14	15+	5/3 Waive	Instl	Deliv	Proc	Waver	IHC	Mem	Err	Doc	Int						
1	ROUTE 1	141	288	288	486	6,990	13,138	30,276	184,207	1,581-	67,927	1128	305	324.03-	1707	288	104	0	210														
2	ROUTE 2	117	204	204	274	4,740	10,248	21,529	114,113	423-	51,186	927	143	346.03-	1041	193	87	0	156														
10	GOLD CUST	27	92	92	132	1,772	3,032	7,406	30,362	721-	10,120	565	234	87.45-	433	132	34	0	62														
19	SWIP	3	5	5	9	133	338	672	4,080	321-	849	0	48		19	6	7	0	5														

TIME FINISHED:09:19:51

Active Inventory Analysis Report

The Active Inventory Analysis (**INVACTRP**) is a snapshot report showing all inventory for a specific store by model number. It lists the status, cost, purchase date, days old, accumulated rent, rates, and other fields associated with inventory as of the date the report is generated. Two filter options are available: Detail and Summary. The recommended frequency is Weekly or Monthly. Reports print landscape on legal size paper. They may be added to the report Spooler or manually generated.

The report may be generated manually by typing **INVACTRP** in the **Jump-To** box from the main cynergi|suite screen.



Report Filter Options

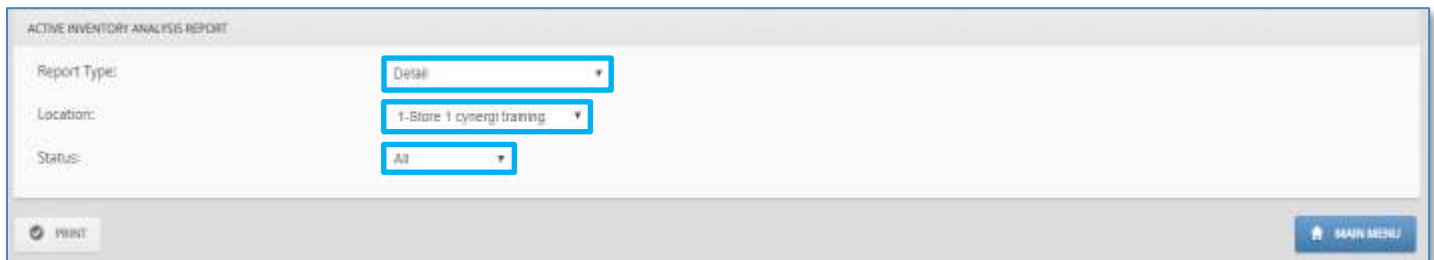
Report Type

- **Detail** – Displays detailed information of all individual active inventory for selected store(s)
- **Summary** – Displays inventory information and statistics by Product Code

Location – A single store or multiple stores may be selected

Status – Any one of the following inventory status options may be selected

- All
- N-New
- R-Re-Rental
- O-On-Rent
- L-Loaner



Report Details

- **CL:** Class (F-Fixed Asset, O-Rent To Own, R-Rent To Rent, S-Sales/Retail)
- **Model Number:** Created by the client (typically consists of a 2-character Product Code, 3-character Brand code, and Manufacturer's model)
- **Brand:** Three character brand code
- **Rate Code:** Rate Code assigned to the Model Number (if using Rate Code pricing)
- **Alt Id:** Alternate ID
- **Sts:** Inventory Status (N-New, R-Previously Rented, O-On Rent)
- **Original Cost:** Original cost of the unit
- **Purchase Date:** Date Received
- **Days Old:** Days elapsed since Purchase Date
- **First Rented:** Date unit was first rented
- **Times Rented:** Number of times the unit has been on-rent (cumulative)
- **Days Rented:** Number of days unit has been rented (cumulative)
- **Accum Rent:** Accumulated Rent (cumulative)
- **Days Idle:** Days old – Days rented
- **Pct Idle:** Days Idle ÷ Days Old
- **Due Date:** Current due date if unit is on rent
- **Payout Date:** Due Date + Months Remaining
- **Months Remain:** Rent Remaining ÷ Rental Rate (if monthly) or Rent remaining ÷ Rental Rate ÷ 4.33 (If weekly)
- **Rate:** Current rental rate as well as the payment mode
- **Rent Remaining:** Remaining Balance
- **Rent Next 12 Months:** Rent remaining to be collected in the next twelve months
- **Buyout:** Buyout Balance (Typically only used in North Carolina)
- **Receivable:** Receivable calculated amount of total customer receivable (based on the units actual RTO amount divided by total contract amount)
- **Anticipated Turns:** Total Accum Rent (On-rent only) + Total Rent Remaining (On-rent only) ÷ Total Original Cost (On-rent only)

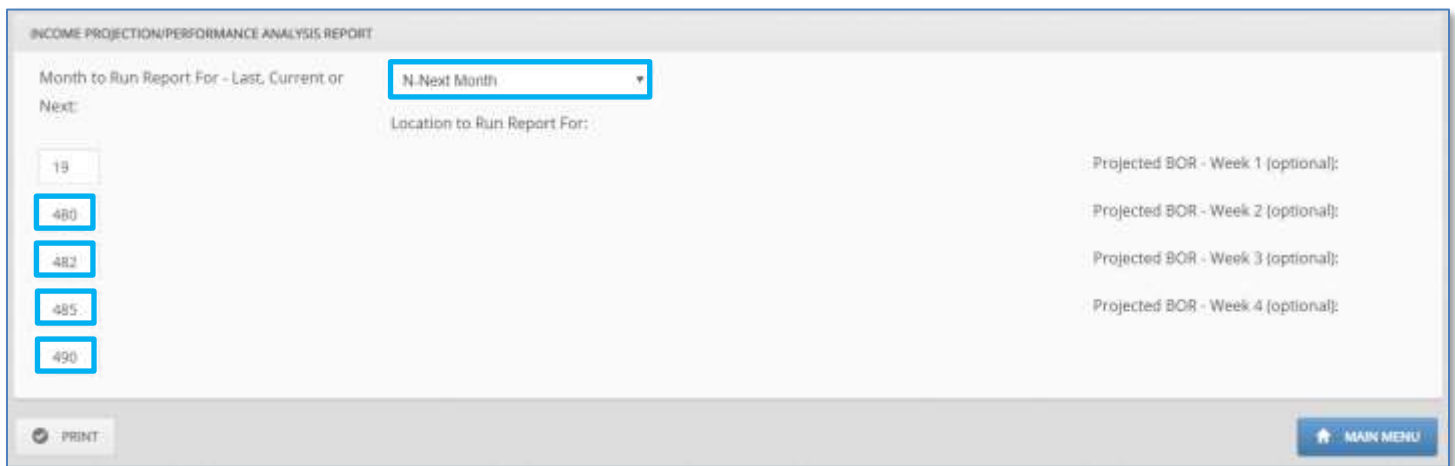
Income Projection/Performance Analysis Report

The Income Projection/Performance Analysis Report (**INCPRJRP**) may be used to track performance by printing a summary of projected store rental income with comparisons to actual rental income. Three filter options are available: Last Month, Current Month, and Next Month. The recommended frequency is Monthly. Reports print portrait on letter size paper. They may be added to the report Spooler or manually generated.

The report may be generated manually by typing **INCPRJRP** in the **Jump-To** box from the main cynergi|suite screen.



The report is designed to generate for a single location and can be run for the last (previous) month, the current month, or next month. The user may optionally enter projected BOR for each of the four weeks of the projected month. If the user does not enter “Projected BOR” on the selection screen, the BOR will be assumed to be the number of open agreements on the last day of the month prior to the projection (report) month.



Report Layout:

RUN TIME: 09/01/15 15:36:45 1A		INCOME PROJECTION/PERFORMANCE ANALYSIS REPORT (INCPJRJP)						PAGE: 1			
As of: Monday - 8/31/15 1B		for: KANSAS CITY						1C AUGUST, 2015			
% WEEKLY ACCOUNTS: 76.11% 1F		BOR PROJECTIONS ASSUMED 1E						WEEKLY UNIT AVERAGE: 20.09 1I			
% SEMI-MONTHLY ACCTS: 1.82% 1G		Final: End of Month 1D						SEMI-MONTHLY UNIT AVERAGE: 47.32 1J			
% MONTHLY ACCOUNTS: 18.62% 1H		1L MONTHLY BOR AT PROJECTED MONTH END: 91						MONTHLY UNIT AVERAGE: 88.92 1K			
		1M PRIOR MONTH ENDING BOR: 494									
***** PROJECTED RENTAL INCOME *****											
2A	2B	2C	2D	2E	2F	2G	2H	2I	2J	2K	2L
PROJ BOR	WEEK	WEEKLY NUMBER DUE/WK	WEEKLY INCOME DUE/WK	MONTHLY PRCNT DUE/WK	MONTHLY NUMBER DUE/WK	MONTHLY INCOME DUE/WK	SEMI-MO PRCNT DUE/WK	SEMI-MO NUMBER DUE/WK	SEMI-MO INCOME DUE/WK	TOTAL INCOME DUE/WK	TOTAL AVERAGE DUE/WK
494	1st	375.99	7553.64	53.26	48.99	4356.19	50.00	8.99	425.41	12335.24	24.97
494	2nd	375.99	7553.64	4.35	4.00	355.68	0.00	0.00	0.00	7909.32	16.01
494	3rd	375.99	7553.64	19.57	18.00	1600.56	50.00	8.99	425.41	9579.61	19.39
494	4th	375.99	7553.64	13.04	11.99	1066.15	0.00	0.00	0.00	8619.79	17.45
40.70 %	29th	153.03	3074.37	2.17	1.99	176.95	0.00	0.00	0.00	3251.32	16.17
0.00 %	30th	0.00	0.00	6.52	5.99	532.63	0.00	0.00	0.00	532.63	0.00
4.22 %	31st	15.86	318.63	1.09	1.00	88.92	0.00	0.00	0.00	407.55	19.54
TOTAL PROJECTED RENTAL INCOME 2M 42635.46											
OVERALL PROJECTED AVERAGE PER UNIT 2N 19.39											
***** PERFORMANCE ANALYSIS *****											
		1st WEEK	2nd WEEK	3rd WEEK	4th WEEK	29th DAY	30th DAY	31st DAY			
PROJECTED BOR 3A		494	494	494	494	40.70 %	0.00 %	4.22 %			
PROJECTED RENTAL INCOME 3B			Final: End of Month				Final: End of Month				
FOR THE WEEK		12335.24	7909.32	9579.61	8619.79	3251.32	532.63	407.55			
FOR THE MONTH		12335.24	20244.56	29824.17	38443.96	41695.28	42227.91	42635.46			
PURCHASE OPTION CREDITS 3C			Final: End of Month				Final: End of Month				
FOR THE WEEK		215.86	135.97	288.43	169.45	88.99	104.97	0.00			
FOR THE MONTH		215.86	351.83	640.26	809.71	898.70	1003.67	1003.67			
ACTUAL RENTAL INCOME 3D			Final: End of Month				Final: End of Month				
FOR THE WEEK		5349.00	8130.42	9969.39	8480.21	2936.38	0.00	1030.11			
FOR THE MONTH		5349.00	13479.42	23448.81	31929.02	34865.40	34865.40	35895.51			
RENTAL INCOME PERFORMANCE			Final: End of Month				Final: End of Month				
FOR THE WEEK	3E	45.11 %	104.51 %	107.07 %	100.34 %	93.05 %	19.70 %	252.75 %			
FOR THE MONTH		45.11 %	68.32 %	80.77 %	85.15 %	85.77 %	84.94 %	86.54 %			
ACTUAL TOTAL BOR 3F		488	490	489	485	486	0	486			
ACTUAL TOTAL INCOME			Final: End of Month				Final: End of Month				
FOR THE WEEK	3G	18844.00	10425.07	12583.80	11315.03	3660.31	0.00	1322.41			
FOR THE MONTH		18844.00	29269.07	41852.87	53167.90	56828.21	56828.21	58150.62			
RETURNED NSF CHECKS 3H		380.64-	0.00	0.00	0.00	0.00	0.00	0.00			
***** 4A INCOME PER DAY *****											
		SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY			
		0.00%	4.22%	3.00%	6.62%	14.83%	30.64%	40.70%			
END TIME: 09/01/15 15:36:45											

Report Heading

The data in this section is based on the date the report was generated, what month the report was run for (last, current, or next), and the values in the summary record on the last day of the month prior to the report month. When running the report for last month or the current month, the figures should not change.

- **Run Date and Time (1A):** Date and time the report was generated.
- **(As of) Day and Date (1B):** The business day prior to the run date when report is run for the current or future month. When report is run for last month, this is the last day of the month that the report is being run for.
- **Projections (Report) Month (1C):** Month and Year the report was run for.
- **Report Month Description (1D):** This describes what month the report is being run for. It will either be “Final: End of Month,” “Current: Month to Date,” or “Preliminary: Future Month,” depending if the report was run for Last, Current or Next month.
- **BOR Projections Description (1E):** This will be “BOR PROJECTIONS ASSUMED” if the user did not enter BOR projections on the report selection screen, in which case the projected BOR will be the open number of agreements on the last day of the month prior to the projection (report) month. Otherwise, it will be “BOR PROJECTIONS ENTERED” if the user did enter projected BOR on the report selection screen.

- **Weekly Accounts (1F):** The percent of weekly accounts (including bi-weekly accounts) from the last day of the month prior to the report month.

$$\frac{(\text{SUM-NBR-RTO-WKLY-AGMTS} + (\text{SUM-NBR-RTO-BWKLY-SMTHLY-AGMTS} - \text{SUM-NBR-RTO-SMTHLY-AGMTS}))}{\text{SUM-NBR-OPEN-TICKETS}} * 100$$
- **Semi-Monthly Accounts (1G):** The percent of semi-monthly accounts from the last day of the month prior to the report month.

$$\frac{\text{SUM-NBR-RTO-SMTHLY-AGMTS}}{\text{SUM-NBR-OPEN-TICKETS}} * 100$$
- **Monthly Accounts (1H):** The percent of monthly accounts from the last day of the month prior to the report month.

$$\frac{\text{SUM-NBR-RTO-MTHLY-AGMTS}}{\text{SUM-NBR-OPEN-TICKETS}} * 100$$
- **Weekly Unit Average (1I):** The total of all rates (*regular payments*) of all weekly accounts (*plus half the regular payment amounts of bi-weekly accounts*) divided by the number of weekly (+ bi-weekly) BOR from the last day of the month prior to the report month.

$$\frac{\text{SUM-PROJ-RTO-REV-WKLY}}{[\text{SUM-NBR-RTO-WKLY-AGMTS} + (\text{SUM-NBR-RTO-BWKLY-SMTHLY-AGMTS} - \text{SUM-NBR-RTO-SMTHLY-AGMTS})]} \quad (\text{includes half of total bi-weekly payments})$$
- **Semi-Monthly Unit Average (1J):** The total of all semi-monthly payment amounts divided by the total number of semi-monthly payments from the last day of the month prior to the report month.

$$\frac{\text{SUM-PROJ-RTO-REV-SMTHLY}}{\text{SUM-NBR-RTO-SMTHLY-AGMTS}} \quad (\text{includes only 1 payment per account})$$
- **Monthly Unit Average (1K):** The total of all rates of all monthly accounts divided by the number of monthly BOR from the last day of the month prior to the report.

$$\frac{\text{SUM-PROJ-RTO-REV-MTHLY}}{\text{SUM-NBR-RTO-MTHLY-AGMTS}}$$
- **Monthly BOR at Projected Month End (1L):** Monthly BOR count at the end of the projected month.

$$[\text{PERCENT MONTHLY ACCOUNTS (1H)} / 100] * \text{PRIOR MONTH ENDING BOR (1M)}$$
- **Month Ending BOR for Month, Year (1M):** Total BOR count at the end of the month prior to the report month.

$$\text{SUM-NBR-OPEN-TICKETS (from last day of previous month)}$$

Projected Rental Income

The data in this section is also based on when the report was run, what month the report was run for (last, current or next), and the values in the summary record on the last day of the month prior to the report month. When running the report for last month or the current month, the figures should not change unless the user enters projected BOR numbers on the report selection screen.

- **PROJ BOR (2A):** The projected BOR. If the projection has not been manually entered, then the ending BOR for the month previous to the projection (report) month is used for all weeks and the “BOR PROJECTION ASSUMED” title will appear. The 29th, 30th, and 31st will be the percent of income which that particular day represents (see **INCOME PER DAY** at the end of this section under **Performance Analysis**).
For weeks 1-4: SUM-NBR-OPEN-TICKETS [from last day of month prior to report month (1M)]
For plus days: Income Per Day % (based on actual income received on the day of the week in month prior to report month)
- **WEEK (2B):** There are four weeks in each month and up to 3 additional “plus” days. The weeks will always be for days 1-7 (first week), 8-14 (second week), 15-21 (third week) and 22-28 (fourth week). The “plus” days (29th, 30th, and 31st) will be determined by the number of days in the projection month.
- **WEEKLY NUMBER DUE/WK (2C):** The number of weekly accounts due during the week or plus day.
For weeks 1 through 4: [PROJ. BOR (2A)] * [% WEEKLY ACCOUNTS (1F)]
For the plus days: Same calculation as above except “Plus Day BOR” is substituted for “PROJ. BOR.”
“Plus Day BOR” = [PROJ. BOR, week 4 (2A)] * [PROJ.BOR, plus day % (2A)]
- **WEEKLY INCOME DUE/WK (2D):** The weekly income expected during the week or plus day. For all weeks and all plus days.
WEEKLY INCOME = [NUMBER WEEKLY DUE (2C)] * [WEEKLY UNIT AVERAGE (1I)]
- **MONTHLY PRCNT DUE/WK (2E):** The percent of monthly accounts due during the week or plus day for the month prior to the report month.
For weeks 1 through 4 and all plus days:
(the number of monthly payments expected in each respective week or day) /
(the total number of monthly payments expected)
Example: (SUM-MTHLY-AGMTS-DUE-DAY01-07 / SUM-NBR-RTO-MTHLY-AGMTS) * 100
- **MONTHLY NUMBER DUE/WK (2F):** The number of monthly accounts due during the week or plus day.
For weeks 1 through 4:
[PROJ.BOR (2A)] * [% MONTHLY ACCOUNTS (1H)] * [PERCENT MONTHLY DUE/WK (2E)]
For the plus days: Same calculation as above except “PROJ. BOR, week 4” is substituted for “PROJ.BOR.”
- **MONTHLY INCOME DUE/WK (2G):** The monthly income expected during the week or plus day. For all weeks and all plus days: **[NUMBER MONTHLY DUE/WK (2F)] * [MONTHLY UNIT AVERAGE (1K)]**
- **SEMI-MO PRCNT DUE/WK (2H):** The percent of semi-monthly account payments due during the week or plus day.
For all weeks and all plus days:
(the number of semi-monthly payments expected in each respective week or day) /
(the total number of semi-monthly payments expected)
Ex: [(SUM-SMTHLY-AGMTS-DUE-DAY01-07) / (SUM-NBR-RTO-SMTHLY-AGMTS * 2)] * 100

- **SEMI-MO NUMBER DUE/WK (2I)** The number of semi-monthly account payments due during the week or plus day.
For weeks 1 through 4:
(Semi-Monthly Pmt/Acct Ratio) * (Semi-Monthly BOR) * [SEMI-MO PRCNT DUE/WK (2H)]
Where Semi-Monthly Pmt/Acct Ratio = (the total number of semi-monthly payments) / (the number of semi-monthly accounts).
Where Semi-Monthly BOR = [PROJ. BOR (2A)] * [% SEMI-MONTHLY ACCOUNTS (1G)].
For plus days: Same calculation as above except "PROJ. BOR, week4" is substituted for "PROJ. BOR."
Please Note: Semi-Monthly Pmt/Acct Ratio can be assumed to always be 2.
- **SEMI-MO INCOME DUE/WK (2J):** The semi-monthly income expected during the week or plus day. **For all weeks and all plus days:**
[SEMI-MO NUMBER DUE/WK (2I)] * [SEMI-MONTHLY UNIT AVERAGE (1J)]
- **TOTAL INCOME DUE/WK (2K):** The total income expected during the week or plus day.
For all weeks and all plus days: WEEKLY INCOME EACH/WK (2D) + MONTHLY INCOME EACH/WK (2G) + SEMI-MO INCOME EACH/WK (2J)
- **TOTAL AVERAGE DUE/WK (2L):** The average weekly rental income expected for each unit during the week or plus day.
For weeks 1 through 4: [TOTAL INCOME EACH/WK (2K)] / [PROJ. BOR (2A)]
For the plus days: Same calculation as above except "Plus Day BOR" is substituted for "PROJ. BOR."
Where: "Plus Day BOR" = (PROJ. BOR, week 4) * (PROJ. BOR, plus day)
- **Total Projected Rental Income (2M):** The total of all weeks' and all plus days' total income each week and plus day.
TOTAL INCOME DUE/WK (2K), summed
- **OVERALL PROJECTED AVERAGE PER UNIT (2N):** The average weekly rental income expected for each unit during the month.
For weeks 1 through 4: (Month Unit Average) / (Number of Weeks/Plus Days)
Where Month Unit Average = [TOTAL PROJECTED RENTAL INCOME (2M)] / [PROJ. BOR (2a), week 4]
"Number of Weeks/Plus Days" = 4 (weeks) + (PROJ. BOR, plus days summed)

Performance Analysis

The data in this section compares actual income in the projection (report) month with the projected rental income in the previous section.

- **PROJECTED BOR (3A):** The projected BOR. If the projection has not been manually entered, the ending BOR for the month previous to the projection month is used for all weeks and the "BOR PROJECTION ASSUMED" title will appear. The 29th, 30th and 31st will be the percent of income which that particular day represents (see **INCOME PER DAY** at the end of this section).

Please Note: Same as (2A) except in row form instead of column.

- **PROJECTED RENTAL INCOME (3B):** This is the same as TOTAL INCOME EACH/WK (2K) in the PROJECTED RENTAL INCOME section for completed weeks. However, if the projection is for the current month and the current week is not complete, then the amount will be prorated to include only the days already passed in the week. For the prorated income amount, the calculation will use the sum of the INCOME PER DAY (4A) percentages (already passed in the week) * TOTAL INCOME EACH/WK (2K).
- **PURCHASE OPTION CREDITS (3C):** Credits equal to the amount of the scheduled payments are given through the end of the month or the normal payout date, whichever comes first for agreements that are paid out early. This credit is given so that a penalty is not incurred for early purchase options. If the projection is for the current month and the current week is not complete, then the amount will be prorated to include only the days already passed in the week.

FOR THE WEEK - MTD TOTALS OF:

SUM-EPO-CREDIT-DAY01-07, SUM-EPO-CREDIT-DAY08-14,

SUM-EPO-CREDIT-DAY15-21, SUM-EPO-CREDIT-DAY22-28

SUM-EPO-CREDIT-DAY29, SUM-EPO-CREDIT-DAY30, SUM-EPO-CREDIT-DAY31

Respectively for each column.

FOR THE MONTH: Previous weeks "FOR THE MONTH" amount (zero for 1st week) + the current "FOR THE WEEK" amount.

- **ACTUAL RENTAL INCOME (3D):** The actual amount of rental income received. This does not include fees. If the projection is for the current month, it will be indicated on the report that this is "Current: Month to Date." If the projection is for next month, it will be indicated on the report that the "Data Unavailable." If the projection is for last month, it will be indicated on the report that it is "Final: End of Month."

FOR THE WEEK: MTD TOTALS OF (SUM-PMT-AMT – SUM-RTO-EARLY-BUYOUT-AMTS)

FOR THE MONTH: Previous weeks "FOR THE MONTH" amount (zero for 1st week) + the current "FOR THE WEEK" amount.

- **RENTAL INCOME PERFORMANCE (3E):** This is the comparison of projected rental income (3B) and actual rental income (3D) plus purchase option credits (3C). Fees and other income are not included in this comparison. If the projection is for the current month, it will be indicated on the report that this is "Current: Month to Date." If the projection is for next month, it will be indicated on the report that the "Data Unavailable."

[ACTUAL RENTAL INCOME (3D) + PURCHASE OPTION CREDITS (3C)] / PROJECTED RENTAL INCOME (3B)

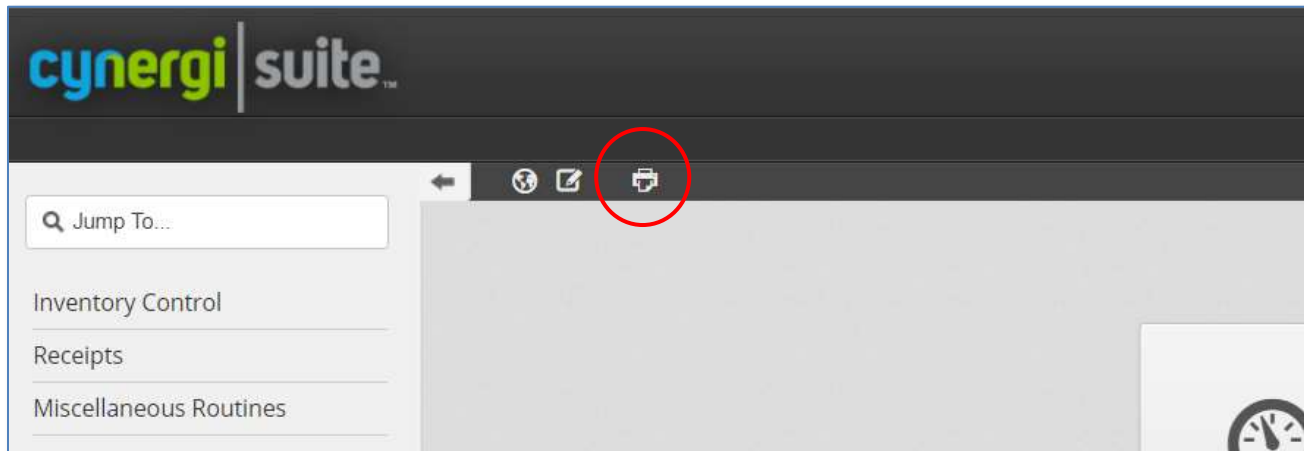
- **ACTUAL TOTAL BOR (3F):** The actual BOR at the end of each week or plus day for the projection month. **SUM-NBR-OPEN-TICKETS on the last day of the week (or plus day) of the report month.** If not available (future periods) then field will display "N/A."

- **ACTUAL TOTAL INCOME (3G):** The actual amount of total income received (which includes fees and other income). This is used for comparison only and not included in the determining rental income performance. If the projects is for the current month, it will be indicated on the report that this is "MONTH TO DATE." If the projection is for next month, it will be indicated on the report that the "Data Unavailable."
FOR THE WEEK: SUM-MTD-REVENUE (from last day of the week)
FOR THE MONTH: Previous weeks "FOR THE MONTH" amount (zero for 1st week) + the current "FOR THE WEEK" amount.
- **RETURNED NSF CHECKS (3H):** The total amount of returned (refunded) bad checks in each week or plus days.
MTD Total of SUM-NSF-RETURNED-CHECKS for the last day in the week.
- **INCOME PER DAY Section (4A):** The percent of income received each day of the week. It is based on the actual rental income received in the month previous to the projection month. If the projection is for next month this data may be incomplete since the current month would be used as the basis and would reflect month to date only.
Calculation: [MTD Total of SUM-PMT-AMT (for each day of the week) / SUM-MTD-PMT-AMT] * 100

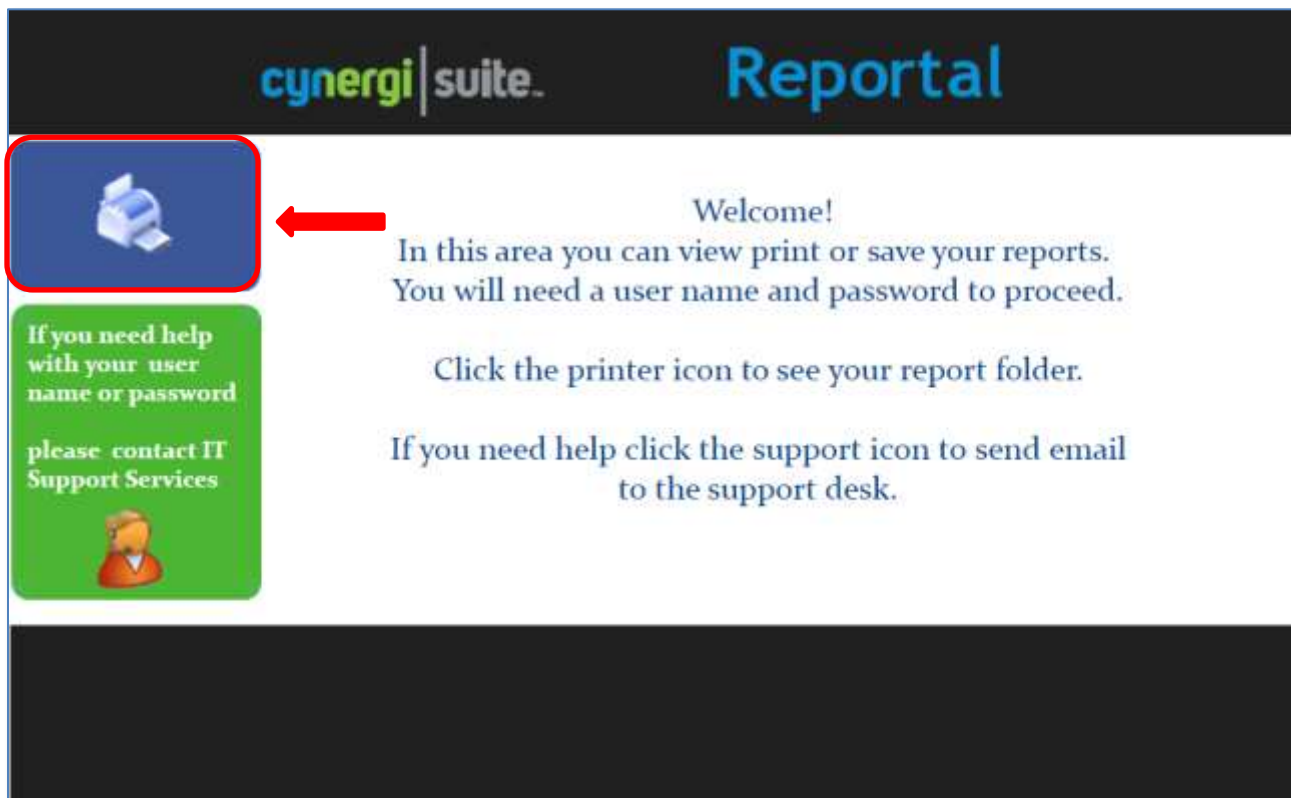
Reportal

The cynergi|suite Reportal is a web-based report viewer. Reports that are automatically generated daily, weekly, and monthly are available to view in either PDF or Text formats. The reports may be viewed, printed, or saved to a local Windows workstation as needed.

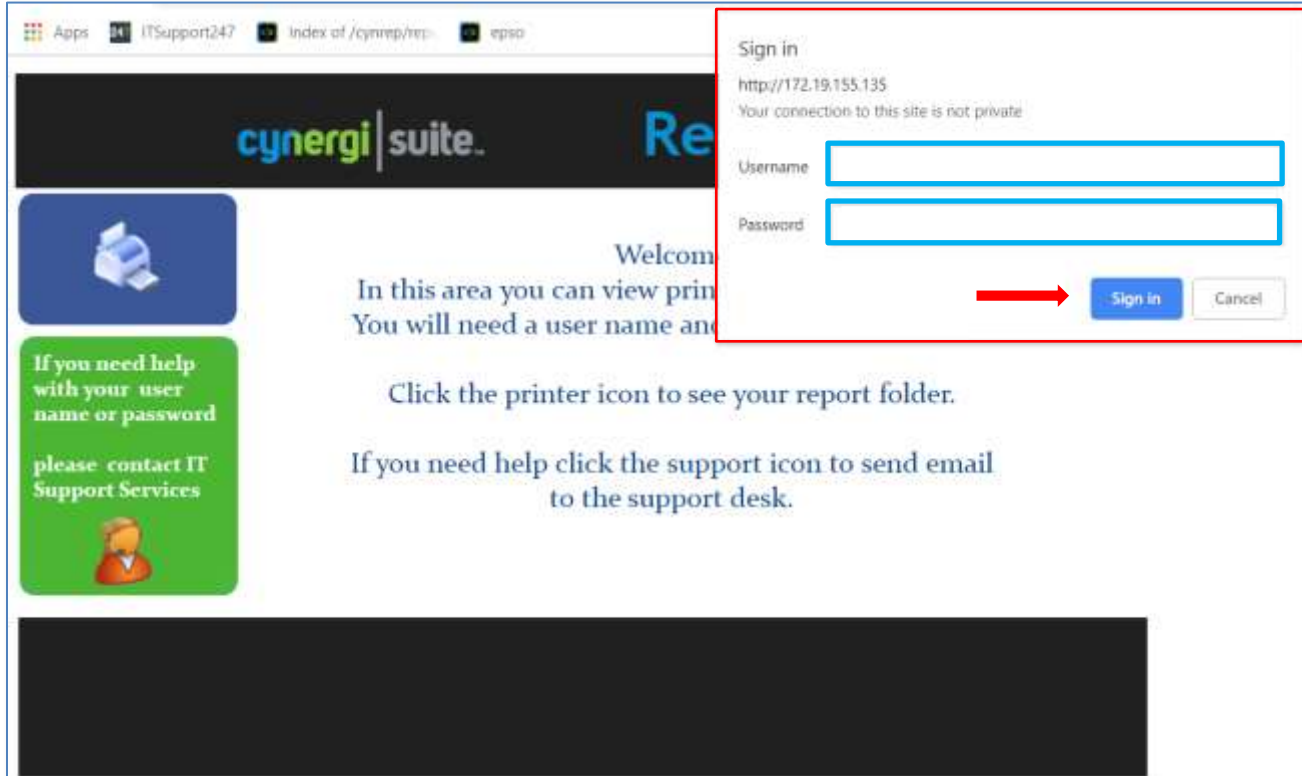
From the cynergi|suite home page, click the **Printer** icon in the **App Bar**, as shown below.



A new browser tab will open loaded with the Reportal. Click the **Printer** icon to continue.



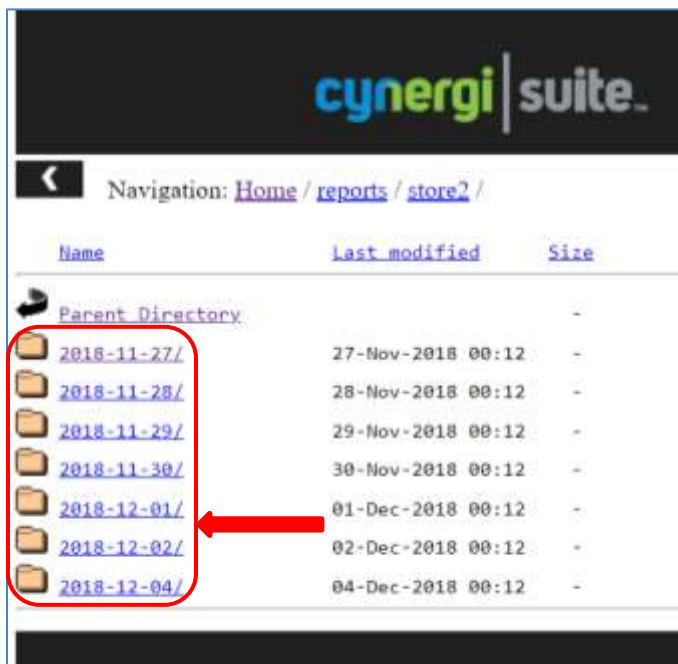
Login to the Reportal by entering a Username and Password, then clicking **Sign in**.
 Login and Passwords are typically provided by home office or management.



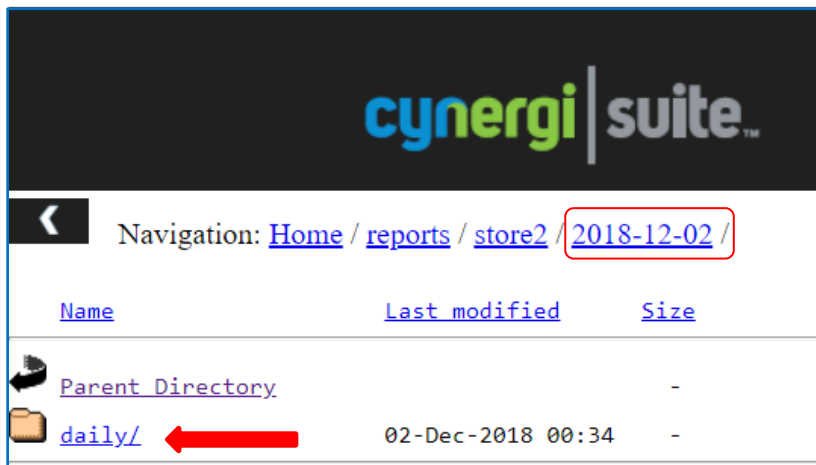
The automatically generated reports will be held in folders, one folder for each business day's reports. The Reportal in standard configuration will store up to 47 previous days' reports.

The business date of the reports in each folder are one day less than the folder date. Example: Reports for a business date of the 15th will be found under the folder dated the 16th. The end of day process runs automatically beginning at midnight, the reports are generated as soon as the end of day completes and they are time stamped accordingly.

Click on the folder **Date** to open the file and view the reports for a business day.



Click the **daily** folder to open the report folder and list the reports for the business day.



The reports under the daily folder are listed in alphabetical order along with the date and time stamp. Two versions of each report are available, **PDF** and **Text**.

Click on the **report name and version** to open the report.



PDF version example:

RUN DATE: 12/02/18										PAGE:											
1										PSALEA											
TIME: :11:29										SALES OF ALL INVENTORY IN DATE ORDER											
UD																					
LOCATION: (2)																					
SALE DATES OF: 11/25/18 THRU 12/01/18										SALES,PENDING SALES AND PENDING SALES DELIVERED PRINTED											
DATE	CUST NBR	AGMT NBR	NAME	LOC	SLSMN	AGRMNT	TTL	PAYMENT FORMS	TAX												
11/28/18	201037	22	AARON, DANIEL	2	998	162.38	162.38	1	12.38												
11/28/18	200989	24	ABDALLE, ABDIKADIR	2	998	216.50	216.50	1	16.50												
11/29/18	201124	26	ACOSTA, JENIFFER	2	998	595.38	595.38	1	45.38												
11/29/18	202345	29	ADIRO, JIM	2	998	270.63	270.63	1	20.63												
11/29/18	901756	31	JONES, LINDA	2	998	270.63	270.63	1	20.63												
11/29/18	500872	33	SMITH, DOROTHY	2	998	649.51	649.51	1	49.51												
<table border="0"> <tr> <td>LOC TOTAL</td> <td>2:</td> <td>2,000.00</td> <td>0.00</td> <td>100.0</td> <td></td> <td>165.03</td> <td>0.00</td> <td>0.00</td> <td>8.00</td> <td>2,165.03</td> <td>2,000.00</td> </tr> </table>										LOC TOTAL	2:	2,000.00	0.00	100.0		165.03	0.00	0.00	8.00	2,165.03	2,000.00
LOC TOTAL	2:	2,000.00	0.00	100.0		165.03	0.00	0.00	8.00	2,165.03	2,000.00										
PAYMENT FORMS SUMMARY																					
FORM	DESCRIPTION			AMOUNT	FORM	DESCRIPTION			AMOUNT												
1	CASH			2,165.03																	
CASH TOTAL:		2,165.03	A/R TOTAL:		0.00																

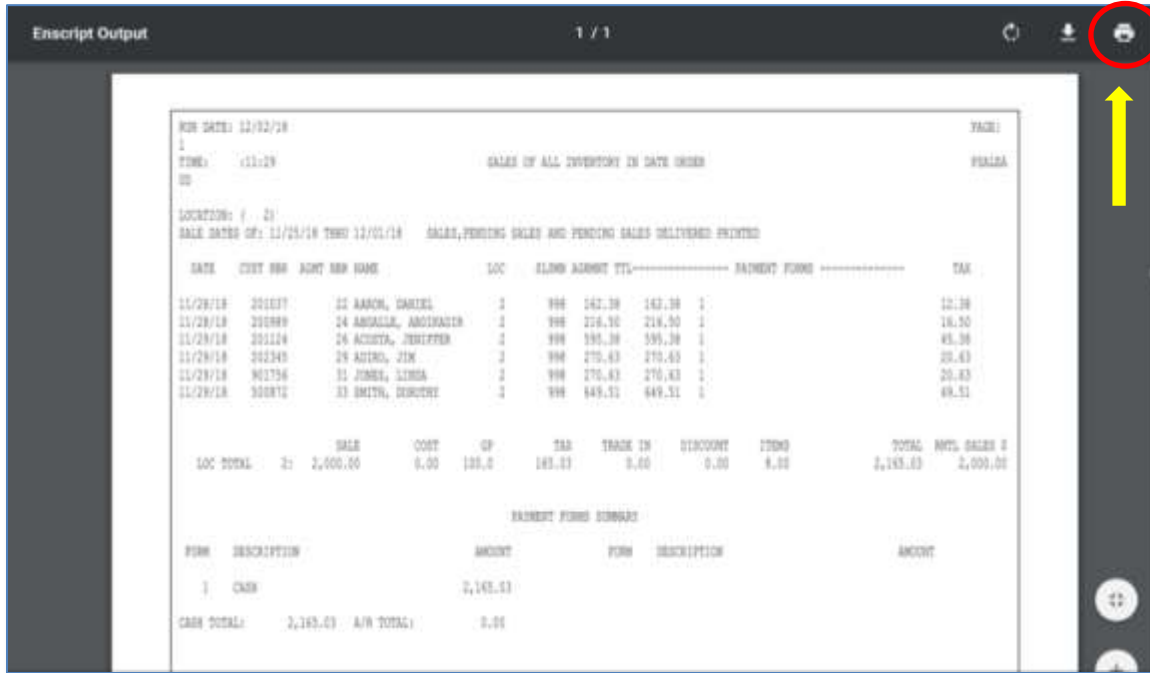
Text version example:

RUN DATE: 12/02/18										PAGE: 1											
TIME: :11:29										PSALEAID											
SALES OF ALL INVENTORY IN DATE ORDER																					
UD																					
LOCATION: (2)																					
SALE DATES OF: 11/25/18 THRU 12/01/18										SALES,PENDING SALES AND PENDING SALES DELIVERED PRINTED											
DATE	CUST NBR	AGMT NBR	NAME	LOC	SLSMN	AGRMNT	TTL	PAYMENT FORMS	TAX												
11/28/18	201037	22	AARON, DANIEL	2	998	162.38	162.38	1	12.38												
11/28/18	200989	24	ABDALLE, ABDIKADIR	2	998	216.50	216.50	1	16.50												
11/29/18	201124	26	ACOSTA, JENIFFER	2	998	595.38	595.38	1	45.38												
11/29/18	202345	29	ADIRO, JIM	2	998	270.63	270.63	1	20.63												
11/29/18	901756	31	JONES, LINDA	2	998	270.63	270.63	1	20.63												
11/29/18	500872	33	SMITH, DOROTHY	2	998	649.51	649.51	1	49.51												
<table border="0"> <tr> <td>LOC TOTAL</td> <td>2:</td> <td>2,000.00</td> <td>0.00</td> <td>100.0</td> <td></td> <td>165.03</td> <td>0.00</td> <td>0.00</td> <td>8.00</td> <td>2,165.03</td> <td>2,000.00</td> </tr> </table>										LOC TOTAL	2:	2,000.00	0.00	100.0		165.03	0.00	0.00	8.00	2,165.03	2,000.00
LOC TOTAL	2:	2,000.00	0.00	100.0		165.03	0.00	0.00	8.00	2,165.03	2,000.00										
PAYMENT FORMS SUMMARY																					
FORM	DESCRIPTION			AMOUNT	FORM	DESCRIPTION			AMOUNT												
1	CASH			2,165.03																	
CASH TOTAL:		2,165.03	A/R TOTAL:		0.00																

Print PDF Reports from the Reportal

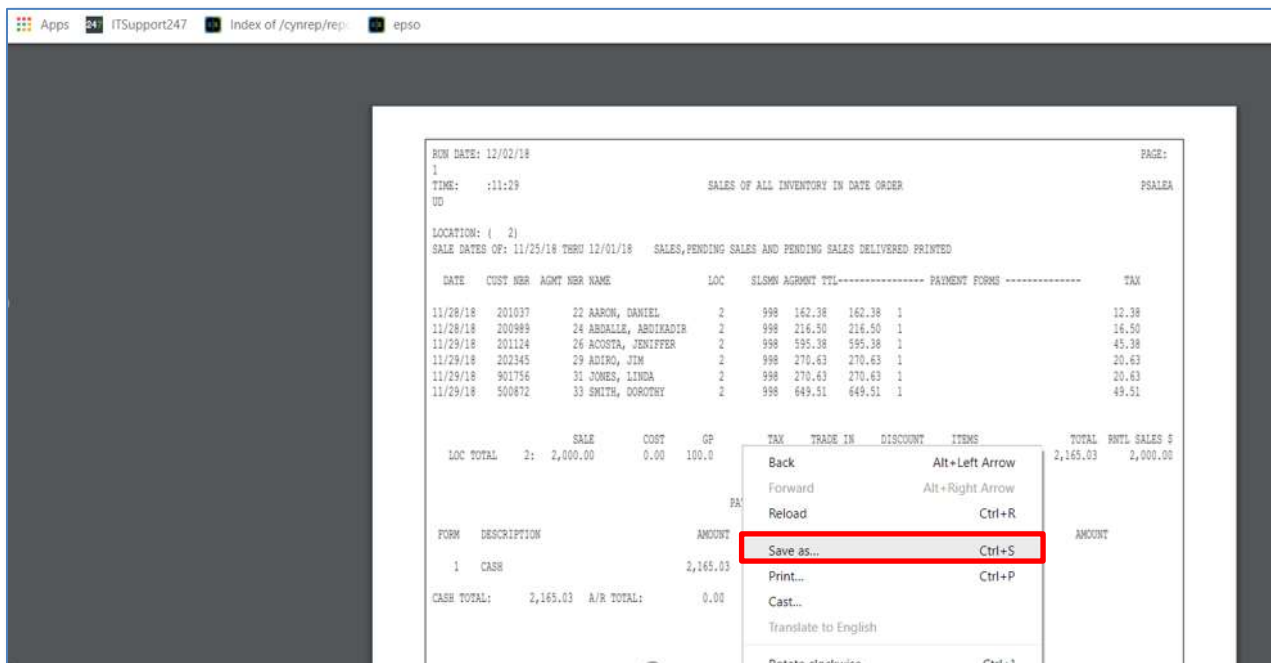
To print from the Reportal. With the PDF version report open, click on printer at the top right-hand corner, then follow the steps on your screen to print as normal from windows.

Another option to print is to right-click on the screen and select the **Print** icon.



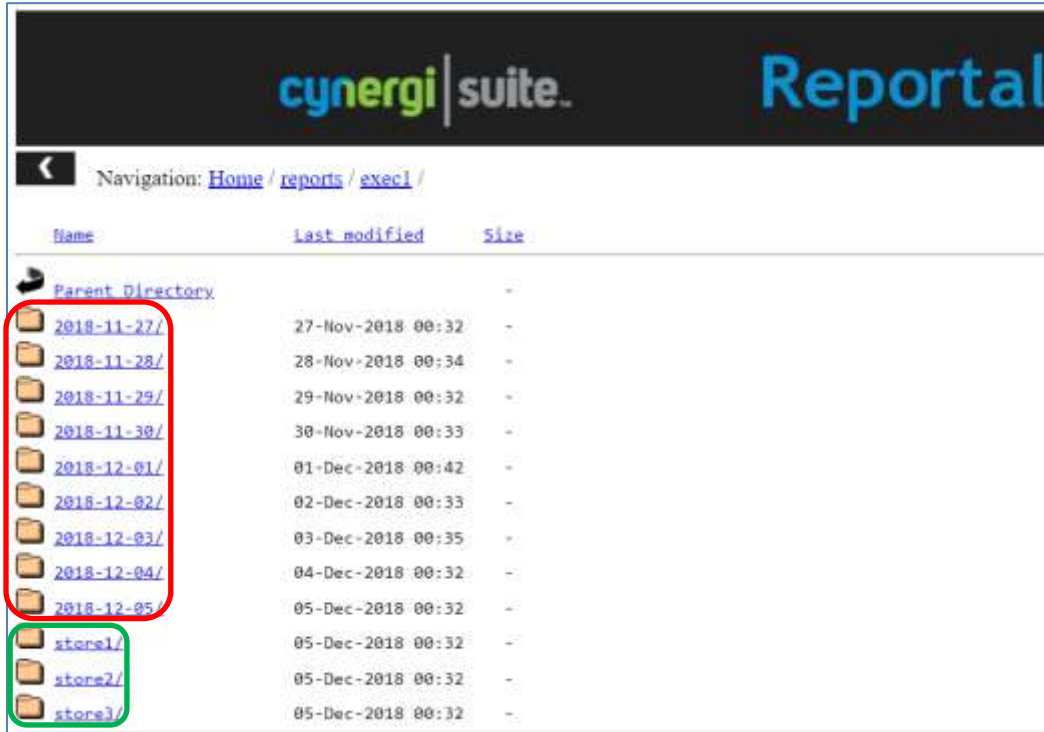
Save PDF or Text Reports from Reportal to a desktop computer/workstation

To save the report to your desktop computer, with the PDF version report open, right click on screen, click **Save as**. Then select the appropriate desktop folder.



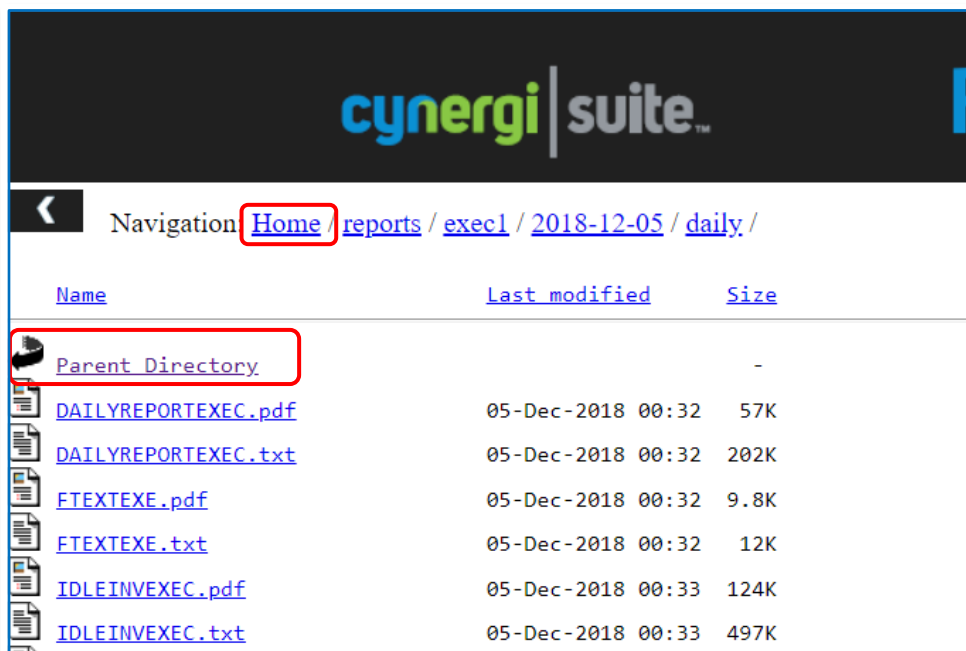
Home Office/Exec View

The login process is the same as the store level for Home Office (Exec level). However, a specific login ID and password are required. The Exec level daily folders are listed at the top of the screen and contain Home Office/Management level reports, organized in folders for each business day. The individual store folders listed at the bottom of the screen are accessible and contain the same daily report folders as previously shown above.



Reportal Navigation

- Click **Parent Directory** to step back to main report listings.
- Click **Home** in the navigation bar to return to the Reportal Home screen.



Generating Cynergi|suite Reports

Updates have been added to enhance printing cynergi|suite reports. Selected reports can be sent to an Email Address, File/Printer, Reportal, or PDF.

Reports that have been enhanced:

- Account Manager Performance Report (**AMGRPERF**)
- AP General Ledger Report (**APGLRPT**)
- Print APU Report (**APURPT**)
- AR Customer Payments (**ARPMTS**)
- Bank Month End Agreement Analysis (**BNKAGRRP**)
- Past Due Call List/Close (**BWACRPT**)
- Credit Card Integration Recon Report (**CCRCONRP**)
- Check Report (**CHECKRPT**)
- Delivery Income Report (**DELINCME**)
- Inventory Exchange Report (**EXCHGRPT**)
- Exception Analysis Report (**EXCPTARP**)
- Expensed Inventory Report (**EXPINVRP**)
- Statement of Operations (**FINSTATE**)
- Free Time/Extension Report (**FTEXTRPT**)
- G/L Profit Center Trail Balance Report (**GLPFTBAL**)
- G/L Transaction Search Report (**GLSRCH**)
- Active Inventory Analysis Report (**INVACTRP**)
- Idle Inventory (**INVIDLRP**)
- Audit Trail of Inventory In (**INVINRPT**)
- Audit Trail of Inventory Out (**INVOUTRP**)
- Online Payment Reconciliation Report (**OLPREPRT**)
- Serialized Inventory Alt ID Report (**PINVBC**)
- Serialized Inventory Idle Report (**PINVIDLE**)
- Rental Inventory Pricing Report (**PINVPRC**)
- Payments Report (**PMTS**)
- Receipt Audit Report (**RCPTARPT**)
- Recurring Online Payment Report (**RECOLPRT**)
- Retail Inventory Status Report (**RETINVRP**)
- Print RTO Receivables (**RTORECVP**)
- Units Being Serviced Report (**SERVTRPT**)
- Sales Tax Analysis Report (**SLTAXRPT**)
- Transaction Audit Trail (**TRAUDRPT**)
- Print Customer Overdue Report (**ZIP**)

Please Note: Additional reports will be enhanced in the future.

Print Information Screen

The screenshot displays the 'Print Information' screen. On the left is a sidebar menu with a search bar containing 'PMTS' and options: Inventory Control, Receipts, Miscellaneous Routines, Inquiries, End-of-Day Process, Generate Reports, and Collections. The main area is titled 'PRINT INFORMATION' and contains a 'Print Type' dropdown menu (highlighted with a green box) showing options: F-File/Printer, E-Email, R-Reportal, P-Pdf, and F-File/Printer (highlighted with a blue box). To the right is a 'Printer/File Path Name' text box containing 'LP333' (highlighted with a red box). Below these is an 'OK' button and a 'MAIN MENU' button. A status bar at the bottom shows 'Print Type: (E)mail, (P)df, (R)reportal, (F)ile/Printer'.

- 1) Type a report name into the **Jump-To** box and press **ENTER**.
- 2) The **Print Information** screen displays.
- 3) Click on the drop-down arrow for the **Print Type** pick list and options for Email, Reportal, PDF, and File/Printer will display.

Email

PRINT INFORMATION

Print Type: E-Email

Email Address:

Separate Locations: No

OK MAIN MENU

- 1) Perform steps 1 through 3 from the section **Print Information Screen** above.
- 2) Select the **E-Email** option, press **TAB**, and enter an **Email Address** for the desired recipient.
- 3) Click the **OK** button.
- 4) The report screen will display. Answer or complete remaining fields.
- 5) The report should arrive at the designated recipient's email address.

Reportal

PRINT INFORMATION

Print Type: R-Reportal

Reportal Output Folder: EXEC1

Separate Locations: No

OK MAIN MENU

- 1) Perform steps 1 through 3 from the section **Print Information Screen** above.
- 2) Select the **R-Reportal** option, press **TAB**, and enter the **Reportal Output Folder**. *Example: enter the appropriate EXEC folder (EXEC1, EXEC2, etc.) to hold the output.*
- 3) Click the **OK** button.
- 4) The report screen will display. Answer or complete remaining fields.
- 5) Go to the **REPORTAL** and find the report in the designated output folder.

PDF

PRINT INFORMATION

Print Type: P-Pdf

PDF file name:

Separate Locations: No

OK MAIN MENU

- 1) Perform steps 1 through 3 from the section **Print Information Screen** above.
- 2) Select the **P-Pdf** option, press **TAB**, and enter the **PDF file name**, up to 15 characters.
- 3) Click the **OK** button.
- 4) The report screen will display. Answer or complete remaining fields.
- 5) The PDF report will pop-up and display.

File/Printer

PRINT INFORMATION

Print Type: F-File/Printer Printer/File Path Name:

Separate Locations: No

MAIN MENU

- 1) Perform steps 1 through 3 from the section **Print Information Screen** above.
- 2) Select the **F-File/Printer** option, press **TAB**, and enter the **Printer/File Path Name**, up to 29 characters.
- 3) Click the **OK** button.
- 4) The report screen will display. Answer or complete remaining fields.
- 5) Go to the designated File Path Name to locate the report.

Security Change Screen

An employee will need to have the security switch set to “Y” for Email, Reportal, and PDF if they want to have these print options display in the **Print Type** pick list. These switches can be set in the third screen of **Security Change (SECmnt)**.

Please Note: The switches are initially defaulted to “N” for No.

Security Change 07/29/19

Employee Nbr: **1**

Reserved: N	Reserved: N	OnLine Payment	Email Pdf: Y
Reportal Pdf: Y	Pop-Up Pdf: Y	Reserved: N	
15-Not Used: N	16-Not Used: N	13-Not Used: N	Post Maverick: N
19-Not Used: N	20-Not Used: N	17-Not Used: N	
24-Not Used: N	25-Not Used: N	22-Not Used: N	
27-Not Used: N	28-Not Used: N	26-Not Used: N	30-Not Used: N
31-Not Used: N	32-Not Used: N	29-Not Used: N	34-Not Used: N
35-Not Used: N	36-Not Used: N	33-Not Used: N	38-Not Used: N
39-Not Used: N	40-Not Used: N	37-Not Used: N	42-Not Used: N
43-Not Used: N	44-Not Used: N	41-Not Used: N	46-Not Used: N
47-Not Used: N	48-Not Used: N	45-Not Used: N	50-Not Used: N
51-Not Used: N	52-Not Used: N	49-Not Used: N	Disp SSN Search: N
ReRent Inv Cust: Y	56-Not Used: N	53-Not Used: N	58-Not Used: N
59-Not Used: N	60-Not Used: N	57-Not Used: N	62-Not Used: N
63-Not Used: N		61-Not Used: N	
Reserved: N			

Arrow Keys--Positioning, Return--Next Field, F8--Backout, Cmd--Exit Pgm