Overview

Convert your raw sales data into meaningful information effortlessly. The Sales Analysis Report Generator enables you to generate summary and/or detailed reports using pre-defined formats (column headings) and sort sequences with user-defined filters and customization options. This powerful feature of dynaMACS provides you with virtually limitless possibilities for generating vital sales and commission reports.

This document is intended to help you maximize the benefits of Sales Analysis Reports.

Table of contents:

Step 1.	Select Source of Data:		
	Shipment	S	←	Select source of data entry
	Commission Recd	C		

Overview:

Most sales analysis reports should be printed using Shipment as the source.

If your agency does not utilize the optional Commission Reconciliation Module:

♦   Shipment is your ONLY available option.

If your agency does utilize the optional Commission Reconciliation Module:

♦   Commission Received is an available option for Source of Data.

♦   Generally, Shipment reports will reflect sales and commission amounts based on shipment information entered from invoices.

   o   These reports will accurately reflect true sales figures and should be used on reports that may be discussed with a customer or manufacturer

♦   Commission Received reports will reflect sales and commission amounts based on actual commissions posted.

♦   These reports reflect when an agency was paid on previous sales. These reports are typically used for payroll, budgeting and accounting purposes.

Step 2: Column Set (Headings)

Step 2. Select Column Set (Headings) Group for the report:

[dropdown:]
Sales Only
Sales and Agency Commission
Agency Commission Only
Sales and Sales Rep Commission
Goal Tracking
Show All

Select a Column Set (Headings) Group

Overview:

Step 2 of generating a Sales Analysis Report in dynaMACS requires the user to select a "Column Set (Headings)." The format determines what column headings and associated data fields will appear on the report. The chart below lists each of the available formats in dynaMACS. For each format, the type of data included on the report is listed along with special features and which example reports use that format.

Format Group	Format	Sales	Agency Commission	SalesRep Commission	Goal Tracking	12 Individual Months	Special Features	Example Reports
Sales Only	J	X					Simple, Basic Sales Analysis	
	K	X					Current, Last & Previous Year-to-Dates	
	G1	X					Includes Percent of Total Sales	
	3Y	X				X	Individual Months for 3 Years	
Sales & Agency Commission	E	X	X				Simple Sales & Commission	
	R	X	X				Sales with comparison & Commission	
	X	X	X				Includes Average Commission Rates	
	G2	X	X				Includes Percent of Total Commission	
Agency Commission Only	JA		X				Simple Analysis of Agency Commission	
	KA		X				Current, Last & Previous Year-to-Dates	
	G3		X				Includes Percent of Total Commission	
	3YA		X			X	Individual Months for 3 Years	
SalesRep Commission	R3	X		X			Simple Sales & Sales RepCommission	
	JR			X			SalesRep Commission Only	
	KR			X			Current, Last & Previous Year-to-Dates	
	3YR			X		X	Individual Months for 3 Years	
Goal Tracking	Z1	X			X		Worksheet for Sales	
	Z1C	X	X		X		Worksheet for Sales & Commission	
	Z2	X			X		Year-to-Date Sales Goal	
	Z3	X			X		Annual Sales Goal	
	Z4	X	X		X		Year-to-Date Sales & Commission Goal	
	Z5	X			X		Annual Sales & Commission Goal	

Information Included on Report spans the Sales, Agency Commission, SalesRep Commission, Goal Tracking, and 12 Individual Months columns.

Format Examples

Sales Only

These formats present sales information only. Because they contain NO commission information, they are ideally suited for use with Customers and Manufacturers. These formats also work well with agencies that do not share commission information with Sales Reps.

Format: J

```
---------------------------------------------------------------------------------
Last  ***************************  S A L E S  *****************************
Actvy     CurMo    LYCurMo     CurYTD       LstYTD       $ Variance %      LYTtl
---------------------------------------------------------------------------------

10/11    433,526    336,726    4088,738    3810,670      278,068    +7%   4580,807
```

Format: K

```
------------------------------------------------------------------------------------------
Last  *********************************  S A L E S  ************************************
Actvy     CurMo    (C)urYTD    (L)stYTD    (P)rvYTD        (C)vs(L) Variance (C)vs(P)      LYTtl
------------------------------------------------------------------------------------------

10/11    433,526    4088,738    3810,670    2981,895     278,068  +7%    1106,843  +37%   4580,807
```

Format: G1

```
-------------------------------------------------------------------------------------
Last  ****************************  S A L E S  *********************************%***%
Actvy     CurMo    LYCurMo     CurYTD       LstYTD       $ Variance %      LYTtl YTD LYT
-------------------------------------------------------------------------------------

10/11    433,526    336,726    4088,738    3810,670      278,068    +7%   4580,807 100 100
```

Format: 3Y

```
------------------------------------------------------------------------------------------------
        ************************************* M O N T H L Y  S A L E S ******************************    YTD/
          Jan      Feb      Mar      Apr      May      Jun      Jul      Aug      Sep      Oct      Nov      Dec     Total
------------------------------------------------------------------------------------------------

2011  298,963  368,923  382,449  510,270  426,222  357,550  476,111  503,396  331,328  433,526                    4088,738
2010  179,732  322,096  279,002  367,221  335,750  440,226  624,293  583,010  342,614  336,726  404,755  365,382  4580,807
2009  299,367  299,367  299,367  299,367  299,367  299,367  299,367  299,367  299,937  287,022  242,955  219,320  3444,170
```

Sales & Agency Commission

These formats present sales and agency commission information. Because they DO contain commission information, they should be used with some descretion. These formats should NOT be used on reports that are likely to be viewed by Customers.

Format: E

```
------------------------------------------------------------------------------------
Last     *********** S A L E S *********** ****** C O M M I S S I O N **********
Actvy     CurMo      ThsYTD     LstYTD     LYTtl     CurMo     ThsYTD     LstYTD     LYTtl
------------------------------------------------------------------------------------

10/11    433,526    4088,738   3810,670   4580,807   25,019   218,118   194,941   238,562
```

Format: R

```
---------------------------------------------------------------------------------------
 Last    *********************** S A L E S ********************** **** AGY COMMISSION *****
Actvy     CurMo      CurYTD     LstYTD     $ Variance %     LYTtl    CurMo     CurYTD     LYTtl
---------------------------------------------------------------------------------------

10/11    433,526    4088,738   3810,670   278,068   +7%  4580,807   25,019   218,118   238,562
```

Format: X

```
-----------------------------------------------------------------------------------------
********************** S A L E S ********************** ****** C O M M I S S I O N *******
  CurMo      CurYTD     LstYTD     $ Variance %     LYTtl     CurMo     CurYTD   Mo% YTD%   LY%
-----------------------------------------------------------------------------------------

 433,526   4088,738   3810,670    278,068  +7% 4580,807    25,019    218,118  5.77  5.33  5.21
```

Format: G2

```
----------------------------------------------------------------------------------------
  Last    **************** S A L E S ***************** ***** COMMISSION ******%***%
 Actvy     CurYTD     LstYTD       Var$     Var%     LYTtl     CurYTD     LYTtl  YTD LYT
----------------------------------------------------------------------------------------

10/11    4088,738   3810,670    278,068    +7%   4580,807   218,118   238,562  100 100
```

Agency Commission Only

These formats present agency commission information only. Because they contain ONLY commission information, they should be used with care. These formats are extremely helpful in evaluating the bottom line. After all, you don't put sales dollars in the bank!

Format: JA

```
--------------------------------------------------------------------------------
Last  **********************  C O M M I S S I O N  *************************
Actvy    CurMo    LYCurMo    CurYTD     LstYTD      $ Variance %     LYTtl
--------------------------------------------------------------------------------

10/11   25,019    17,499    218,118    194,941     23,177   +12%    238,562
```

Format: KA

```
----------------------------------------------------------------------------------------
Last  ****************************  C O M M I S S I O N  ****************************
Actvy    CurMo   (C)urYTD   (L)stYTD    (P)rvYTD       (C)vs(L) Variance (C)vs(P)      LYTtl
----------------------------------------------------------------------------------------

10/11   25,019   218,118    194,941     161,879       23,177  +12%      56,239 +35%   238,562
```

Format: G3

```
-----------------------------------------------------------------------------------
Last  ************************  C O M M I S S I O N  **************************%***%
Actvy    CurMo    LYCurMo    CurYTD     LstYTD      $ Variance %     LYTtl YTD LYT
-----------------------------------------------------------------------------------

10/11   25,019    17,499    218,118    194,941     23,177   +12%    238,562 100 100
```

Format: 3YA

```
-------------------------------------------------------------------------------------------------
        ***************************  M O N T H L Y  C O M M I S S I O N  S A L E S ****************************  YTD/
        Jan     Feb     Mar     Apr     May     Jun     Jul     Aug     Sep     Oct     Nov     Dec     Total
-------------------------------------------------------------------------------------------------

2011   15,971  20,144  21,175  29,509  23,909  13,598  24,094  25,197  19,502  25,019                          218,118
2010    9,492  16,536  15,645  20,361  18,257  20,593  32,248  27,728  16,582  17,499  22,922  20,699          238,562
2009   16,221  16,221  16,221  16,221  16,221  16,221  16,221  16,221  16,250  15,861  15,179  14,006          191,064
```

SalesRep Commission

These formats present SalesRep commission information. The R3 Format also shows limited Sales Information. These formats are helpful for the Sales Rep to monitor what contributes to his/her bottom line. They typically are not used for printing the actual commission statement. A Posted Sales (or Commissions) Report should be used for that purpose because it lists individual invoices.

Format: R3

```
-----------------------------------------------------------------------------------------
Last   ********************** S A L E S ************************  **** REP COMMISSION *****
Actvy     CurMo     CurYTD     LstYTD     $ Variance %      LYTtl    CurMo     CurYTD     LYTtl
-----------------------------------------------------------------------------------------

10/11    433,526   4088,738   3810,670    278,068   +7%   4580,807   10,990    95,276   104,106
```

Format: JR

```
-----------------------------------------------------------------------------
Last   ****************** R E P   C O M M I S S I O N  ************************
Actvy     CurMo     LYCurMo     CurYTD     LstYTD       $ Variance %      LYTtl
-----------------------------------------------------------------------------

10/11    10,990     7,712      95,276      84,949      10,327    +12%   104,106
```

Format: KR

```
----------------------------------------------------------------------------------------
Last   ************************** R E P   C O M M I S S I O N  ****************************
Actvy     CurMo     (C)urYTD    (L)stYTD     (P)rvYTD        (C)vs(L) Variance (C)vs(P)     LYTtl
----------------------------------------------------------------------------------------

10/11    10,990     95,276      84,949       70,425        10,327  +12%     24,851  +35%   104,106
```

Format: 3YR

```
------------------------------------------------------------------------------------------------------
       ****************************** M O N T H L Y  R E P  C O M M I S S I O N ***************************  YTD/
         Jan     Feb     Mar     Apr     May     Jun     Jul     Aug     Sep     Oct     Nov     Dec      Total
------------------------------------------------------------------------------------------------------
2011   7,083   8,843   9,244  12,848  10,498   5,972  10,482  10,892   8,424  10,990                      95,276
2010   4,123   7,241   6,777   8,894   7,942   9,078  14,012  11,972   7,198   7,712  10,157   9,000     104,106
2009   7,057   7,057   7,057   7,057   7,057   7,057   7,057   7,057   7,068   6,901   6,718   6,073      83,216
```

Goal Tracking

These formats are used exclusively with the Optional Goal Tracking Module.

Format: Z1

```
-----------------------------------------------------------------------------------------------------
SalesRep                                       Last  *** SALES GOAL ****  ******** S A L E S ************
   Manufacturer Customer  NAME            City StaActvy  NextTtl    CurTtl    CurYTD    LYTtl    PYTtl
-----------------------------------------------------------------------------------------------------

02 LJM ABBH00-   Abbott Health Products   Louisville      10/11  _____               25,366   23,840   17,592
```

Format: Z1C

```
-----------------------------------------------------------------------------------------------------
SalesRep                                       Last *** G O A L ***  ********** S A L E S ********** **AvgComm%**
   Manufacturer Customer  NAME            City StaActvy  NextTtl  Comm%    CurYTD     LYTtl    PYTtl CurYTD LYTtl
-----------------------------------------------------------------------------------------------------

02 LJM ABBH00-   Abbott Health Products Louisville      10/11  _____  _____      25,366   23,840   17,592  8.74  5.23
```

Format: Z2

```
---------------------------------------------------------------------------------------------
Last  ************************************  S A L E S  ************************************
Actvy     CurMo    LYCurMo  Var%--GOAL---YTD   CurTYD     LstYTD      $ Variance %     LTYtl
---------------------------------------------------------------------------------------------

10/11   433,526    336,726                  4088,738   3810,670    278,068   +7%   4580,807
```

Format: Z3

```
---------------------------------------------------------------------------------------------
Last  ******************************  S A L E S   ************************** ** SALES GOAL ***
Actvy     CurMo    LYCurMo    CurYTD     LstYTD       $ Variance %      LYTtl    CurTtl  Rel%
---------------------------------------------------------------------------------------------

10/11   433,526    336,726   4088,738   3810,670    278,068   +7%    4580,807
```

Format: Z4

```
-------------------------------------------------------------------------------------------------
Last  *****************  S A L E S  *****************  ************* C O M M I S S I O N ************
Actvy     CurMo    CurYTD     GoalYTD     $ Variance %     CurMo     CurYTD     GoalYTD      Var$  Var%
-------------------------------------------------------------------------------------------------

10/11   433,526   4088,738              4088,738       25,019    218,118              218,118
```

Format: Z5

```
------------------------------------------------------------------------------------------------
Last  **********************  S A L E S  *************************** ** SALES GOAL ***  ** COMM GOAL ***
Actvy     CurMo    CurYTD     LstYTD      $ Variance %      LYTtl    CurTtl  Rel%    CurTtl  Rel%
------------------------------------------------------------------------------------------------

10/11   433,526   4088,738   3810,670    278,068   +7%    4580,807
```

Overview

Step 3 of generating a Sales Analysis Report involves selecting the sequence the report should be printed. There are numerous pre-defined sequences built-in to dynaMACS.

For example: SortBy: S2   SalesRep / Customer / Manufacturer

S2 is an arbitrary code assigned to this report sequence. The description identifies how the report will be sequenced and what sub-totals to expect. This report will:

- Skip to a new page for each SalesRep
- Print the customers within the SalesRep territory
- Print totals for each manufacturer the customer buys from
- Print the total for all manufactuers for each customer
- Print the total for all customers for each Sales Rep
- All reports print an Agency Total on the final page

```
                          SalesRep / Customer / Manufacturer Report
Format: J                                                                  Sales as of 10/2011
SortBy: S2                                       *02* Jim Black                      EOY Mth: 12
------------------------------------------------------------------------------------------------
Customer              Last  *************************  S A L E S  *****************************
  Manufacturer        Actvy    CurMo    LYCurMo    CurYTD    LstYTD     $ Variance %      LYTtl
------------------------------------------------------------------------------------------------
Adel's Dist / Cinci
  Apcal Alloy Company  10/11      338                  821       194        627  +323%      8,243
  Isle Restoring Co.   12/10<               663                  887        887-  -100%       459
  Lee Jacob Mfg        10/11   11,471     11,149    166,203   222,816    56,613-   -25%    257,311
  MNC Company          10/11      810      1,232      8,303     3,004      5,299  +176%        248
  Simpso Part Supply   10/11    2,165        474     10,221    10,767        546-   -5%     12,711


  *Ttl Cust *ADED00CI* 10/11   14,784     13,518    185,548   237,668    52,120-   -22%    278,972
```

Another example: SortBy: M3   Manufactuerer / Customer

Again, M3 is an arbitrary code assigned to this report sequence. This report will:

- Skip to a new page for Manufacturer
- Print totals for each customer ther manufacturer sells to
- Print the total for all customers for each manufacturer
- All reports print an Agency Total on the final page

```
                              Manufacturer / Customer Report
Format: K                                                                            Sales as of 10/2011
SortBy: M3                                    *LJM* Lee Jacob Mfg                              EOY Mth: 12
---------------------------------------------------------------------------------------------------------
                    Last  ********************************  S A L E S  ********************************
SalesRep Customer   Actvy    CurMo   (C)urYTD   (L)stYTD   (P)rvYTD     (C)vs(L) Variance (C)vs(P)    LYTtl
---------------------------------------------------------------------------------------------------------

02  Adel's Dist / Cinci  10/11  11,471   166,203   222,816   177,454   56,613-  -25%    11,251-   -6%  257,311
03  Achin Welding Co     10/11  13,367   173,702    93,353    71,053   80,349  +86%   102,649 +144%  115,611
01  Agora Metals         10/11   3,391    67,187    55,975    44,286   11,212  +20%    22,901  +52%   61,460
01  Adel's Dist / Dayton 10/11   1,381    53,715    42,710    32,345   11,005  +26%    21,370  +66%   58,796
02  American Instruments 10/11  10,316    66,400    49,834    38,619   16,566  +33%    27,781  +72%   57,502
04  Babson Tooling       10/11   5,070    35,261    35,667    27,671      406-   -1%     7,590  +27%   45,981
---------------------------------------------------------------------------------------------------------
02  Antenna Development  09/10<                      234       187       234--100%      187--100%      234
04  Alert Alarm Design C 08/11            415        225       177        190  +84%       238 +134%      225
03  Air Plating Co       09/10<                       27        21        27--100%       21--100%       27
02  Acme Sign Company    10/11*  1,777    1,777                          1,777             1,777
04  Baka Steel Company   10/11     488    1,769                          1,769             1,769

* Total Mfg    *LJM*     10/11  79,991   887,159   752,737   586,342   134,422  +18%   300,817  +51%  910,036
```

Listed below are all the pre-defined SortBy options available:

SalesRep Reports

```
S0   SalesRep
SA1  SalesRep / Customer
S2   SalesRep / Customer / Manufacturer
SC1  SalesRep / Customer / MfgRel / Mfg
SL4  SalesRep / Customer(State-Cty) / Mfg
SL6  SalesRep / Customer(Zip) / Mfg
SD   SalesRep / Division / Manufacturer
S3   SalesRep / Manufacturer
S1   SalesRep / Manufacturer / Customer
Z1   SalesRep / Manufacturer / Customer
SR   SalesRep / MfgRel / Customer
SR1  SalesRep / MfgRel / Mfg / Customer
SL5  SalesRep / State / Customer(Cty) / Mfg
```

Reports based on SalesRep Classifications

```
B1   Branch
BS3  Branch  / SalesRep
```

Manufacturer Reports

```
M0   Manufacturer
M3   Manufacturer / Customer
MC1  Manufacturer / CustomerType / Customer
MD0  Manufacturer / Division
MD2  Manufacturer / Division / Customer
MD1  Manufacturer / Division / SalesRep
M2   Manufacturer / SalesRep
M1   Manufacturer / SalesRep / Customer
ML0  Manufacturer / State / SalesRep
```

Reports based on Manufacturer Classifications

```
R1   MfgRel
RC   MfgRel / Customer
RM   MfgRel / Manufacturer
RM2  MfgRel / Manufacturer
RM1  MfgRel / Manufacturer / Customer
RMS  MfgRel / Manufacturer / SalesRep
RSM  MfgRel / SalesRep / Manufacturer

T1   MfgType
TMC  MfgType / Customer
TM   MfgType / Manufacturer
TM0  MfgType / Manufacturer / Customer
TMS  MfgType / SalesRep / Mfg / Customer
TML  MfgType / State
```

Customer Reports

```
C1   Customer
C2   Customer / Manufacturer
CM   Customer / MfgRel / Manufacturer
CX   Customer Alpha
```

Reports based on Customer Classifications

```
A1   CustomerABC
AC   CustomerABC / Customer
AC1  CustomerABC / Customer / Mfg

CR   CustomerRel

CT   CustomerType
CT2  CustomerType / SalesRep

D1   Division
DC   Division / Customer

LS   State
LS1  State / City
LS2  State / City / Customer / Manufacturer
LS3  State / Manufacturer
L0   State / Region
L1   State / Region / City
L3   State / Region / City / Customer
L2   State / Region / City / Manufacturer
LS4  State / SalesRep

LR   StateRegion
LR1  StateRegion / Customer
LR2  StateRegion / Customer / Manufacturer

LG   Region
LG1  Region / Customer
LG2  Region / Customer / Manufacturer
```

Mfg/Customer Cross Reference Reports

```
XS   X-Ref Source
XC   X-Ref Source / Customer
XM   X-Ref Source / Manufacturer
XM1  X-Ref Source / Manufacturer / Customer
```

Overview

The options feature in Sales Analysis Reports, enable the user to customize a report to fit specific agency requirements.

Filters / Range

This option enables the user to filter the report to include (or exclude) certain sales and commission records.

Up to four of the following fields may be combined to filter the contents of any Sales Analysis Report:

3	Mfg Code
4	Cust Code
5	Cust Location
6	Rep Code
7	Cust Lookup
8	Cust ABC
9	Cust Type
10	Cust Divison
11	Cust State/Reg
12	Cust State
13	Cust Region
14	Cust ZipCode
16	Cust City
17	Cust Related
18	Cust Status
19	Rep Branch
20	Rep Status
21	Mfg Type
22	Mfg Related
23	Mfg Status
24	Xrf Source
26	L.Act yyyymmdd
27	Cust Lists

Sub-Total By:

This option enables the user modify the selected Sort By.   Selecting any one of the following fields will add an additional sub-total to the report for the field:

```
 0   Standard Sort
 1   SalesRep
 2   SalesRep Branch
 3   Manufacturer
 4   Mfg Related
 5   Mfg Type
 6   CustomerDivisn
 7   Customer Type
 8   Customer ABC
 9   Customer State
10   Customer StReg
11   CustomerRelated
12   X-Ref Source
```

Example: An agency has classified all customers as either OEM or Distribution using the Customer Division. The agency wants to evaluate sales and commissions for all manufacturers within each Division. There is no pre-defined Division / Manufacturer Sort By. However, the exact same result is obtained by selecting the M0 Manufacturer Sort By and then Sub-Total By: Field #6 - Customer Division.

Descend By:

This option enables the user rank the lowest level of sub-totals on the selected Sort By based on any of the following fields:

```
 0   Turn off Descending
 1   Sales-CurrMo
 2   Sales-ThisYTD
 3   Sales-LastYTD
 4   Sales-LastYrTtl
 5   Comm -CurrMo
 6   Comm -ThisYTD
 7   Comm -LstYrTtl
 8   Forecast-ThisYear
 9   Sales-Comp YTDs
```

Example: An agency wants to rank all the customers that buy from each manufacturer based on Year-to-Date Sales. They would select Sort By: M3 Manufacturer / Customer and then Descend By: Field #2 Sales –This YTD.

Descend By: (continued)

Select Range or Top / Bottom

If the Descend By: option is activated, the following screen appears after selecting a field:
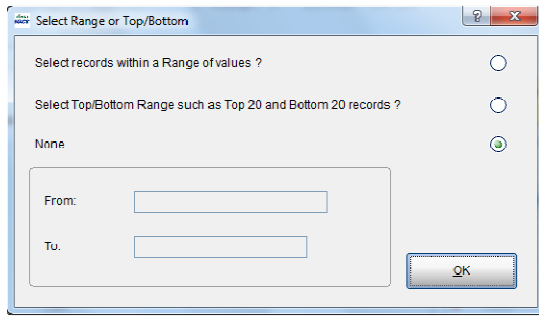
This enables the user to print records based on a range of values for the selected field, just the Top and/or Bottom records or All records or both.

Print As-of-Month/Year
This option enables the user to print the report based on any previous or future point in time. By default, the Month and Year is set to 1 month prior to the current Process Month.

End-of-Year Month:
This option enables the user to base all the amounts on the report on any Fiscal Year, determined by the month selected with this option. By default, the End-of-Year Month is set to 12 (December).

Summarize Related Manufacturers?
This option enables users with multiple manufactuers related to a single manufacturer to summarize the multiple manufacturers into a single total.

Customer Print Name/Address?
This option is available on reports where the customer has subtotals printed below. The Sort By: S2 SalesRep / Customer / Manufacturer is an example. When this box is checked, the full name and address will print. If the box is unchecked, only the customer name will print.

Summarize Locations?
This option is available on reports with customer subtotals. When this box is checked, locations will be summarized and just the total for the Headquarters will print. This option is particularly helpful when ranking customers…the individual locations may appear numerous times on the report without this option checked.

Report Description: _____ _____

Frequency: _____ Distribution: _____

Prepared By: _____ Date: _____

Step 1. Source: ☐ Shipments ☐ Commission Recd

                 Notes: _____

Step 2. Format: _____   Notes: _____

Step 3. Sort By: _____   Notes: _____

Step 4. (Optional)

<u>General:</u>

	Field From	Thru	Include/Exclude	And/Or	
☐ Filters/Range:	_____	_____	_____	☐ / ☐	☐ / ☐
	_____	_____	_____	☐ / ☐	☐ / ☐
	_____	_____	_____	☐ / ☐	☐ / ☐
	_____	_____	_____	☐ / ☐	☐ / ☐

           Notes: _____

☐ Additional Sort/Sub-Total By: _____

           Notes: _____

☐ Sort Report Descending By: _____

       ☐ Filter?   ☐ Range_   _____   _____

                 ☐ Top/Bottom _____

           Notes: _____

☐ Print As of Month/Year:____ / ____   End of Year Month: ____

           Notes: _____

☐ Replace Current Month with_____

☐ Skip Page_____

<u>Manufacturer Options</u>

☐ Replace Manufacturer with Related Manufacturer?

           Notes: _____

<u>Customer Options</u>

☐ Print Customer Name/Address?

           Notes: _____

☐ Summarize Customer Locations?

           Notes: _____