



Computerized

Tire Dealer Information Systems

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Customer Data Viewed As Pie / Bar Charts

The system has the ability to display **bar charts** and **pie charts** from customer historical data accessed from the **MSO** screen, the **I** screen, or the **T** screen.

- I. MSO screen Options
- II. T screen options
- III. I screen options

I. MSO screen Options

A. Search CUSTOMER Past History

1. Name search
2. Address search
3. Phone Number search

B. Select desired account and option T to view transactions

Sq#	A/R #	Customer Name	Address
1.		ROB'S LOC #1	
2.		ROB'S LOC #6	1402 HUNTERS PLA SAN ANTONIO 210-310-5567
3.		ROB'S LOC #7	123 EASY ST APT 100 217-427-4441
4.		ROB'S RICK-RACK	123 EASY ST APT 38 217-310-5567
5.	ROBTST	ROB'S TEST ACCOUNT	123 EASY ST SAN ANTONIO 217-310-5567
6.		ROBBINS GARAGE	BOX 374 GIFFORD 217-568-7225
7.		ROBBINS' BODY SHOP	211 N LOGAN DANVILLE 217-442-1214
8.		KEENE, DR. ROBERT	38 OAKWOOD DR. MAHOMET 217-351-7111
9.		TWOHEY, DR. ROBERT	2320 BRIARHILL CHAMPAIGN 217-352-9323
10.		ROBINSON, DR. ROBERT	601 GLENWOOD RANTOUL 217-893-3700
11.		ROBERT BISHOP	802 E BISSEL BLOOMINGTON 309-828-4663
12.		ROBERT BOONE	2402 S. BURLISON URBANA 217-356-1558
13.		ROBERT BRYANT	2616 RIDGE RD BLOOMINGTON
14.		ROBERT CRAIG	502 N BUCK LEROY
15.		ROBERT K KAZIMOUR CO	
16.		ROBERT PRICE TRUCKING	1507 BASSET LANE CHAMPAIGN 217-356-3006

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Option **5T** (Seq# only, defaults to Active Veh List)

#V - active vehicle list	#W - start WORK ORDER	M - merge two names
#VR - retired vehicle list	#E - start ESTIMATE	X - exit w/o selection
#T - trans by reverse date	(A/R# in REVERSE are assign to A/R loc # BLM)	
#M - map an address	(Lines in low intensity, have no Inv/Est data)	

C. Chose your **Display Format Option** (8)

1. Options **G P** or **M** will have chart options available
 - a. Pie Chart option: G
 - b. Bar Chart options: M P

☞ When accessing this data utilizing the double entry options and additional chart is displayed showing profit. All samples are from the double entry displays.

A/H #.: 5 A/R #.: ROBTST ROB'S TEST ACCOUNT 123 EASY ST SAN ANTONIO, TX 78238	Contact Information Cl: 217-310-5567 Ph: 210-427-1114 Contact: JEREMIAH BULLFROG
<hr/>	
<u>Search Criteria Options</u>	<u>Display Format Option</u>
Limit activity to only:	
1. 'back to' date....: (all)	8. Inv 'Prod Type' GROUP
2. store location....: (all)	
3. product TYPE(s)...: (all)	
4. MFG code...: (all)	
5. vehicle YEAR.....: (all)	
6. MAKE.....: (all)	
7. MODEL.....:	
Enter option# to edit or X to go back: 8	
Options:	
I - Invoice/Estimate	G - Inv 'Prod Type' GROUP P - Inv 'Prod TYPE'
M - Inv Item 'MANUF'	N - Inv Item 'NUMBER' C - Inv Comments
▶ (double entry of GG, PP, MM, NN, or CC enables profit column)	

D. **GG** option sample screen **Group** summary

```

A/H #.:      5  A/R #.: ROBTST  Contact Information
ROB'S TEST ACCOUNT      Cl: 217-310-5567
123 EASY ST             Ph: 210-427-1114
SAN ANTONIO, TX 78238   Contact: JEREMIAH BULLFROG
    
```

#	Group	#I	Qty	Ttl\$	Prft	%%	< Last Act'y	SP/CP>
1	-----	1	1	1	1	100.0	BLM 05/19/08	/MR
2	ACCESSORIES	12	56	1875	1002	53.4	BLM 02/19/09	EC /EC
3	LABOR	13	28	832	832	100.0	BLM 11/17/08	EC /EC
4	MISCELLANEOUS	7	16	828	665	80.4	BLM 11/21/08	EC /EC
5	TIRES	12	26	1052	620	58.9	BLM 02/19/09	EC /EC

```

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Total INVOICE count:      45
Total UNIT count....:    127
Total VALUATION....:      4,588
Total $$ Profit....:      3,120
Total %% Profit....:      68.0
    
```

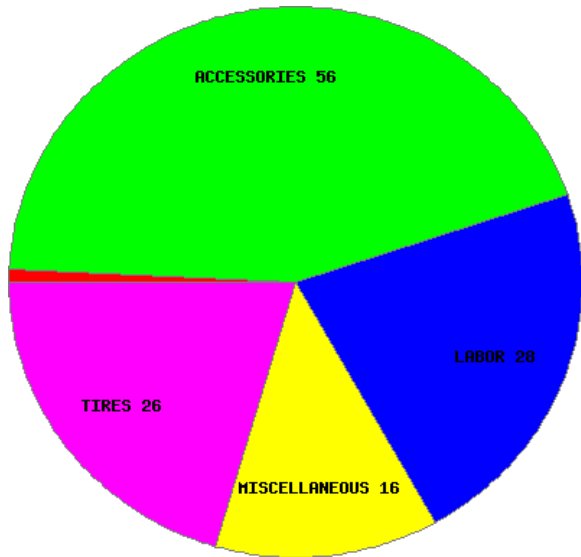
[Press ENTER for first page] [PIE CHART]

```

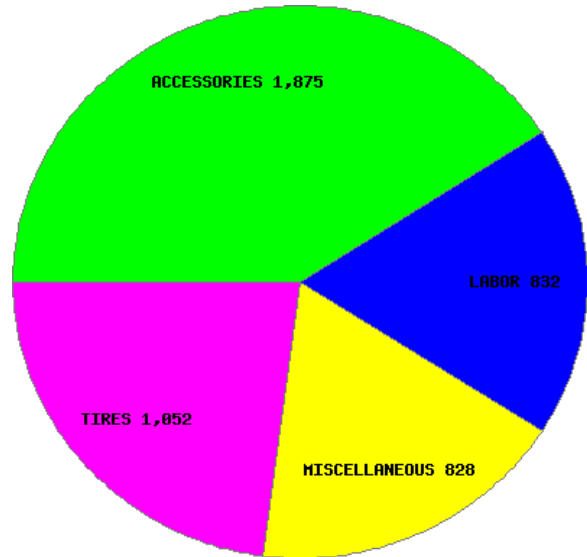
Selection Options:
QQ - go to QUOTE screen      # - prod group detail
W  - start W/O               X  - back one screen
E  - start EST               XX - back to MSO screen
                              R  - reset display format
    
```

Use the mouse arrow to point to and double click on the **Pie Chart** link to display the chart in your browser window.

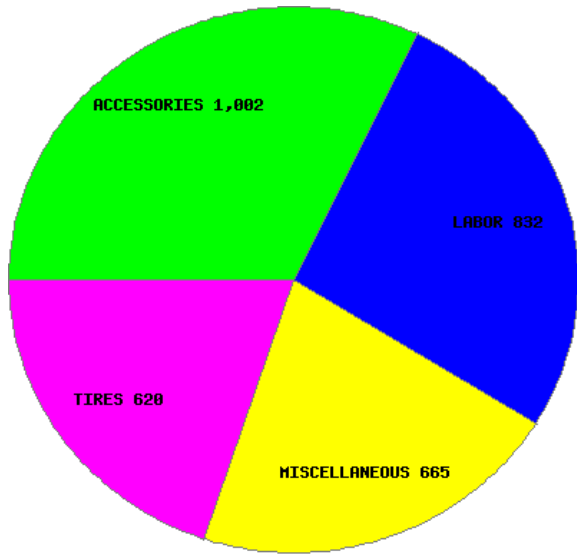
Sample of Pie Chart Data Produce (will be displayed in Web Browser Window)



Product Group - QUANTITY



Product Group - SALES



Product Group - PROFIT

E. PP option sample screen **Product Type** summary

A/H #.: 5	A/R #.: ROBTST	Contact Information
ROB'S TEST ACCOUNT		Cl: 217-310-5567
123 EASY ST		Ph: 210-427-1114
SAN ANTONIO, TX 78238		Contact: JEREMIAH BULLFROG

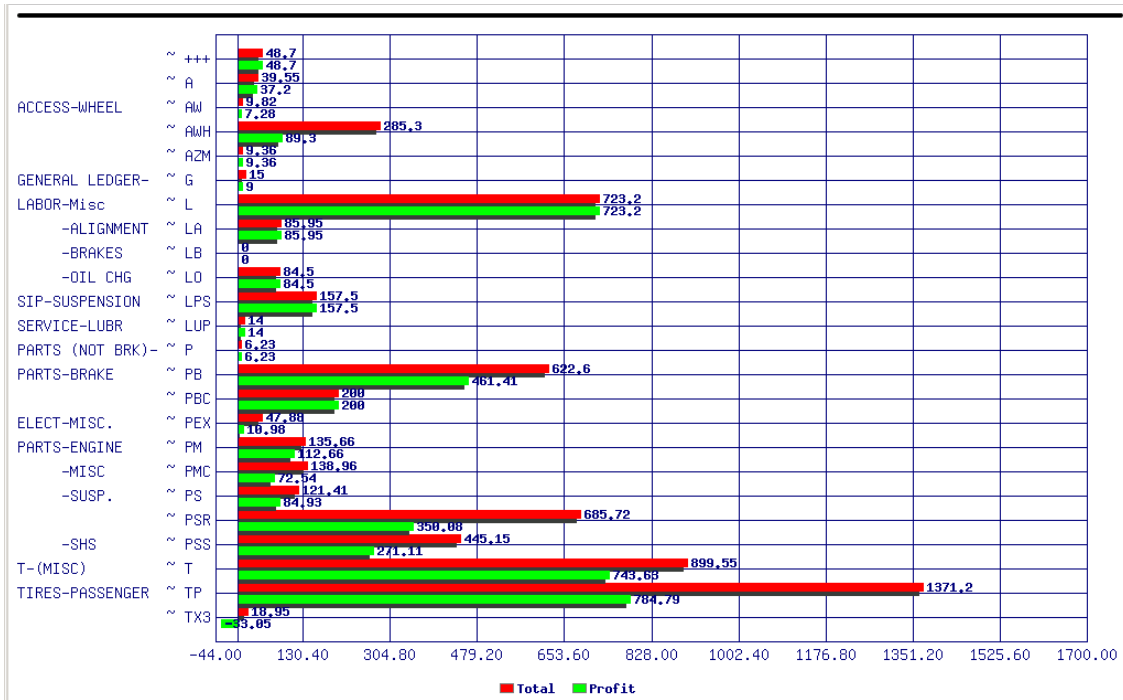
#	Prod type	#I	Qty	Ttl\$	Prft	%%	< Last Act'y	SP/CP>
1	---	1	1	1	1	100.0	BLM 05/19/08	/MRK
2	A ACCESS- MISC	2	7	40	37	94.1	BLM 11/27/03	JMK/JMK
3	AW ACCESS- WHEEL	2	9	10	7	74.1	CHM 03/27/08	JMK/JMK
4	AWH	2	5	285	89	31.3	BLM 02/19/09	EC /EC
5	AZM	1	1	3	3	100.0	BLM 02/19/09	/EC
6	G GENERAL LEDGER	2	3	4	3	75.0	CHM 03/27/08	JMK/JMK
7	L LABOR- Misc	10	15	506	506	100.0	BLM 11/17/08	EC /EC
8	LA LABOR-ALIGNMENT	2	2	121	121	100.0	BLM 08/29/08	JMK/JMK
9	LO LABOR- OIL CHG	1	4	34	34	100.0	BLM 11/03/08	JMK/JMK
10	LPS SIP-SUSPENSION	3	6	158	158	100.0	BLM 08/29/08	JMK/JMK
11	LUP SERVICE - LUBR	1	1	14	14	100.0	BLM 04/13/03	JMK/JMK

[Press ENTER for first page] [BAR CHART]

Selection Options:

QQ - go to QUOTE screen	# - prod group detail
W - start W/O	X - back one screen
E - start EST	XX - back to MSO screen
	R - reset display format

Sample of Bar Chart Data Produce
(will be displayed in Web Browser Window)



F. MM option sample screen **Manufacturer** summary

A/H #.: 5		A/R #.: ROBTST		<u>Contact Information</u>			
ROB'S TEST ACCOUNT				Cl: 217-310-5567			
123 EASY ST				Ph: 210-427-1114			
SAN ANTONIO, TX 78238				Contact: JEREMIAH BULLFROG			

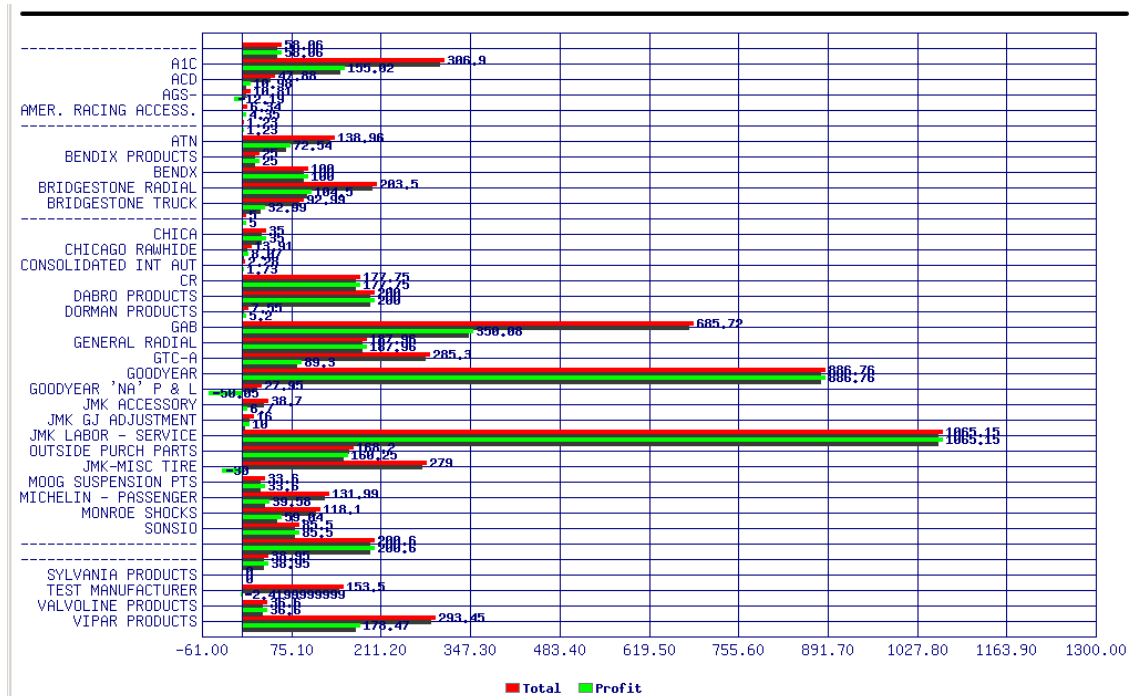
#	MFG	#I	Qty	Ttl\$	Prft	%%	< Last Act'y	SP/CP>
1	-----	2	2	4	4	100.0	BLM 02/19/09	/EC
2	A1C	1	2	307	155	50.5	CHM 03/27/08	JMK/JMK
3	ACD	1	6	48	11	22.9	CHM 03/27/08	JMK/JMK
4	AGS-	1	1	11	-12	----	BLM 10/15/04	JMK/JMK
5	AMER. RACING ACCESS.	1	1	6	4	68.6	CHM 03/27/08	JMK/JMK
6	ATN	1	1	139	73	52.2	CHM 03/27/08	JMK/JMK
7	BENDIX PRODUCTS	1	1	25	25	100.0	BLM 04/07/08	EC /EC
8	BENDX	1	4	100	100	100.0	CHM 03/27/08	JMK/JMK
9	BRIDGESTONE RADIAL	3	3	204	104	51.4	BLM 09/22/08	JMK/JMK
10	BRIDGESTONE TRUCK	1	1	93	33	35.5	BLM 08/12/08	JMK/JMK
11	CHICA	1	2	35	35	100.0	BLM 11/27/03	JMK/JMK

[Press ENTER for next page] [BAR CHART]

Selection Options:

QQ - go to QUOTE screen	# - prod group detail
W - start W/O	X - back one screen
E - start EST	XX - back to MSO screen
	R - reset display format

Sample of Bar Chart Data Produce
(will be displayed in Web Browser Window)



II. T screen options (from within a Work Order or Estimate)

Are the same as the MSO options with the except that the customer account has already been chosen.

Your entry point for this is as shown in section I.C above. All selection and display options are the same as the MSO option.

III. I screen options(from within a Work Order or Estimate)

A. Select option **8** then either % or %% options

 %% option sample screen shown below

% option shows profit from specific work order or estimate

