

Custom Reports

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Getting Started



Why Custom Reports?

- Information is available company wide
- Reduces errors and saves time by entering data only once
- Reduces reporting time
- Formatting makes it easier to have readable information and catch inconsistencies
- Saves dollars by printing "as you go" vs printing large volumes of copies that quickly go obsolete
- Improves communication between departments

Where can you do custom reporting?

- WG module
- CRM Customer Module

What types of reports?

Internal Users

- Administration Track Trends
- Service Component Listing, inspection forms, delivery days, WG identifier signage
- Accounting Calculate margins, reconciliations (inventory-internal & with financing companies), track delayed incentives to make sure we are getting all \$s, etc.
- Sales File labels, WG Sales Packet Labels, customer correspondence, inventory available for sale, Mfg. Status, commission
- Labels Mailings, Files, Packets
- Warranty Claim forms, Component Serial #'s
- Parts Status report to order parts timely for PDI work –reduces PDI days, freight charges on "on-time" parts

External Users

State Required Forms

- Title Applications
- MSO
- License Approvals
- Titling Errors
- "As Is" no Warranty

Customer Required Forms

• School Districts – As delivered

How?

Plan Information

What will my report do?

- View/List/report Information
- Calculate
- Fill or Complete preprinted forms

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What Format?

- Portrait or Landscape
- Margins
- Cover Page / Titles
- Grand Totals / Footers

What is my report name?

Tip: Have a consistent naming structure – it will help locate your reports. i.e. ,group by department or user and what the report is doing.

Admin 01 - Delayed Incentives	Delayed Incentive Rpt. Run at end of Month for Vince
Admin 02 - B Bond Report	B Bond Report to update BB iWarranty Site
Admin 03 - Window Sign (New Buses)	New Bus Window Sign-Print @ Bus Arrival
Admin 04 - UB Sales Margins	UB Sales with Margins
Admin 05 - Cummins Engine Deliveries	Run monthly and send to Cummins
Admin 06 - Missing Propane Tank #s	Buses with Missing Propane Tank Serial Numbers
Admin 08 - Missing Engine Serial Numbers	Buses with missing engine serial numbers
Admin 09 - Duplicate Vin #	Duplicate vin # Report
Admin 11 - Fuel Tax Report	Annual State of Oregon Fuel Tax Calculations
Audit 00	Wholegood Report
Audit 01 - Bus Sales Nov-Dec-Jan	Wholegood Report
Cost 00	Wholegood Report
Cost 01 - Job Cost Worksheet	Wholegood Report
Cost 02 - NB Margins	Wholegood Report
Cost 03 - NB Margins by Salesperson	Wholegood Report
Finance 00	Blank Report for Separation
Finance 01 - GE Inventory Report	Run when GE comes to audit inventory - monthly
Finance 02 - TFG Inventory/Delivery Report	Run monthly when TFG Audits Inventory
Finance 03 - UB Financed-Bank of the West	Wholegood Report
Finance 04 - UB Financed by Date	Wholegood Report
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Select Data



Select a Layout

Tip: Create and save a "Report Layout" specific to reports (i.e., All_ – this includes all fields available in WG). With all data selected you don't have to worry as much about invalid or missing data.



Select Fetch data

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If data is not "fetched"/selected, your report will be blank.

TIP: Filter your data using Report



property filters or setting Parameter fields (see appendix for details).

Develop Report

Select "WG Default Report" from the User reports from WG Master List.

This is a blank template where you will develop your report.

You will place controls/fields within the template to get data to show on your printable report. The Report development screen has 6 areas to familiarize yourself with to define your report.

	Name	Description	Ą
8			
	Used 02 - Bill of Sale	Bill of Sale	
	Used 03 - Dealer Notice	OR DMV Dealer Notice o	
	Used 04 - Buyers Guide	Buyers Guide / As Is No	
	Used 05 - OR Odometer	OR Odometer Disclosur	
	Used 06 - Inventory wit	Used Bus Inventory wit	
	Used 07 - Trades Pending	Trades Pending Listing	
	Used 08 - Available for	Used Buses Available fo	
	Used 09 - Owner Transf	Used Bus New Owner I	
	Used 10 - Inventory Re	Wholegood Report	
>	Wholegood Default Rep	Wholegood Default Rep	Ξ
	z001 - interest compari	Wholegood Report Wholego	1000
~	zdevelon - or title an fo	Wholegood Report	×.
<u></u>			



TIP: Because you cannot save changes to a template, it is a good idea to name your report now. Hopefully you have decided on a standard naming convention (as mentioned earlier).

Save your report by selecting file then save as.

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When the User Reports attributes window appears, enter the report name and type in a description.



Select OK.

TIP: The first time you save a report the system returns you to the WG Master list report. Select Refresh and then look for your report in the User Report List.

#1 Tool Box Section

Contains the controls that you place in your report to provide different actions or appearance. Some are just for "looks" like lines and shapes. Some determine what type of data is displayed ie. A "picture box" allows you to place a picture in your report.

Controls are either Unbound or Bound. Unbound data is static usually like a column label, picture, or report name. Bound data is dependent upon a data source or (field from the WG record or calculation). Refer to Data Binding Section for instructions on how to bind data. Refer to Formatting Section to learn how to change appearance of a control

Most Commonly Used Controls

Label – Use this to display information. It can be either "bound" or "unbound" to a data field. Formulas can be applied to this type of box. It is also the default control type used when drag and drop method for adding a field to the report.

Check Box – Use for a check box in a form. It can either be an open box or a formula can be applied to this to automatically check the box based upon criteria.

Rich Text – Use this to display information. It can be either "bound" or "unbound" to a data field. Use for static text like a column label or report name.

Picture Box – Display a picture or graphic. It is static.





Table – Cells can be bound to data fields to auto fill or unbound to just display a fillable grid. Formats data into a table format.

Line – Place a dividing line either vertically or horizontally in your report.

Shape – Place a predefined shape into your report. It is static.

Page Info – Places a control which displays page # or Date/time stamp, or user name.

Page Break – Manually place a page break in your report.



To insert a control from the tool box: Click on the control name. Then move your mouse pointer over the report layout section and draw an area where you want your control to reside.

Where you place these controls within a "report band section" determines how your data is displayed.

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#2 Report Layout Section

This is where you place controls which determine what data is included in your report and what your report will look like. By default your report has a page header, footer, and a detail section. You can add sections/"bands" to add grouping levels and summary functions.

What happens within each section:

Report Headers – Places any information on this page at the beginning of the report. It prints once at the beginning of the report.

Page headers - Is where you usually put data like column labels, report name (if not on a report header), logos. The information prints on all pages at the top of the page.

Group Headers – Print at the beginning of a group. i.e., if you want a report grouped by the customer's state, then in this section you would put a control bound to the "business state" field. (refer to the Grouping Data to Format Your Report in the appendix for details.)

Detail –Included data on each record selected. Prints detail of the report related to each selected record. If you have fields that bound to a formula the results are based on each record.

Group Footers – Information is included at the bottom of the detail in a group. Prints at the end of a group of data. Calculations can total by group .

Page footers – Places & prints information on the bottom each page. Calculations will print at bottom of page.

Report Footer – Places & prints information once at the end of the report. Calculations will print at end of report.

To add a section, place mouse over report section and right click. Select Insert Band, and select the type of

To remove a section, select band, right click mouse and select delete.

section you are going to insert.

Increase the size of a section, press and hold the left mouse key over the top of the Band at the bottom of the section you want to increase the size of and drag it downward. (i.e., in the example to the left to increase the page header size you click & hold at the top of the "detail band" and drag the band downward.)



#3 Field List Section

Contains all the available **WG fields** to choose from that can be included in your report. This section is also where you create field that **calculate** as well as creating any **Parameter** fields to set runtime filters on your data or to enter data that is not saved within the wholegood record.



Tip: The icon next to the field name indicates the type of data contained in the field. Alpha/text, date/time, the field. check box (or yes/no), or calculated.





To place a Bound field into your report from the field list-- left click and hold down the mouse pointer on top of the field you want to include. Drag and drop the field into a section on the report layout area.

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Calculated Fields – are fields that contain formulas. Formulas are written much like they are done in Excel. The difference is, instead of referencing "cell references" in the formula you enter "field names". Calculations can be performed on numeric, text, check box, and date/time type fields. Calculations are performed automatically when the report is run and if the calculated field is included in the report, it will be displayed. (Refer to Appendix for instructions on creating Calculated fields.)

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TIP: Field names within a formula must have brackets [*fieldname*] before and after the field name or the program doesn't recognize it as a field to perform the calculation on. The field names within a formula are case and space sensitive.

Parameters (located at bottom of field list) are fields where your are prompted to enter data prior to the preview of the report. You can set "runtime" filters or enter data to be displayed on the report but is not saved in the WG record, i.e., WG that sold between 1/1/2011 and 12/31/2011. When you fetched/selected your data, maybe you have all WG's selected. However, you might only want to see sales during a certain period and you might want to change your selection without leaving the report and filtering your data and then reentering the report to run it. Using parameters allows you to do this. (Refer to Appendix Section on creating Parameters.)

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#4 Property Grid

Works hand in hand with the formatting tool bar located at the top of the Report Design window. However it is much more detailed and relates to each individual object of your report (the report, the headers, the column labels, the data, etc.). For example: you may want to change the font color of your column labels or develop mailing labels. To do this you need to select properties in those individual report objects. (See Formatting Beyond the Property Grid in the appendix.)

UserWholegood Report changes properties for the whole report such as margins, borders paper sizes, default printers.

Header Bands (either Page or Group) changes properties for the header. Set default font sizes, background colors, borders.

Detail changes properties for the detail section of your report. Set fonts, sorting, columns or borders.

Footer (either Report, Page or Group) changes properties for each of those areas such as fonts, colors, etc.

Label changes properties for each individual field you have entered onto your report. Set colors, fonts, borders, text wrapping, placement on the page, etc.

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De	tail Detail				•
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	Border Color	Black			
	Border Dash Style	Solid	_/		
	Border Width	1	_/		
	Borders	None			
	- Font	Microsoft Sans Serif, 11pt	/		
	Bold	No	/		
	GDI Character Set	1			
	GDI Vertical Font	No			
	Italic	No			
	Name	Microsoft Sans Serif			
	Size	11			
	Strikeout	No			
	Underline	No			
	Unit	Point			
	Foreground Color	Black			
	Formatting Rules	(Collection)			
	Padding	0, 0, 0, 0			
	 Style Priority 	(Style Priority)			
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	Text Alignment	Top Left			
	Behavior			~	
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	Sort Fields	(Collection)			
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	(Name)	Detail			
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TIP: You can identify what object properties you are effecting by looking in the Description box at the top of the property grid window. As you select different objects in your report, the Property Grid Description changes.

To change a property and to see what options are available, select the 🖵 for each property you are changing.

TIP: Guideline for changing margins, padding, and locations is the value of $100 = 1^{"}$.

TIP: To format your document to print Labels - change the # of columns in the Multi-Column Options area.

CAUTION: Be careful which area you set your properties. Some settings may override settings in other bands, i.e., if you set a default font in the Report Band properties, they can override any fonts in other areas.

#5 Formatting Tool Bar



The tool bar has basic formatting options with "Quick" formatting icons but only includes the basics when it comes to formatting, i.e., text alignment, font color, text type, font face and size.

To change properties using the Formatting Tool Bar:

Select the object (i.e., a column label) and then select any of the icons on the tool bar. The changes will be seen immediately.

#6 Execute Report Commands Tool Bar



This tool bar is located at the bottom of the Report Design window. Selecting the items will do the following:



By default when you enter a report you are in Designer mode. However if you have previewed your report and then need to make changes select this to return to the Report Designer window.



Processes your report and allows you to view it on screen prior to printing a "hard copy". You still have the option of changing some formatting options prior to printing or saving the report to disk.



Processes your report and gives you a on screen preview but there is no option to print a hard copy. You can only save a copy to disk.



Provides an area for further advanced programing options.

Print/Distributing the Report

From the report design window 😡 Designer 🛛 Dreview 🢁 HTML View 🛛 Scripts 🛛 label9 { Select Preview from the Execute Report Command Tool Bar Enter any parameters if requested. Parameters 耴 х Start Date 1/1/0001 -End Date 1/1/0001 -A preview of the report appears Submit Reset Elle Edit giew Format $= \left[\begin{array}{ccc} -1 & 0 \end{array} \right] = \left[\begin{array}{cccc} -1 & 0 \end{array} \right] = \left[\begin{array}{cccc} -1 & 0 \end{array} \right] =$ ш • 04 ***** 4 4 8 An 101000 A Postar Ind Date: 12/17/201 A Label Days to Sale Recer Subrit A Greek Ber -A Rich Test Diese Pitture Stock # Arrival Date Sale Date Sale Days -Panel 4H655225 01/01/2011 04/06/2011 95 Toble 450 S une 5 12456478999998 07/17/2010 08/19/2011 b Shape 14 098100 10BH031K4TF010001 05/04/2008 05/06/2003 04/24/200 1gdhg15reed654 04/24/200 IIII Ber Cold 00 61/15/2009 D1/28/2001 13 10 To Code . 897497 454965469541 12/15/200 01/15/200 the Chart 32 02/15/2009 04/01/2009 WHS7E254 45 ERI 24 E Phot G AVG Sale Day 囁 Page Dric Gas 븝 Sale Date E Page Break rival Date = in Oces-be 02/01/2008 = 02032009 2 😸 Goss-band B 0 IRDS 10DK6P184FV51579848 11005/2004 05/21/2009 1,658 Subreport P9366684 03/15/2008 04/01/2009 C930 AVG Sale Day 550 S Designer Desver Schildle View 😨 Scripts Page 1 of 1 102% 🕞 🕕 🤃 Select any additional formatting or distribution options from the tool bar.

👆 🔯 🗋 🖬 🖬 🖬 12 8 🔳 🗳 🗳 🔜 0 Q 100% 0 ٠ Background Save to disk Print-Select printer arameters Quick Print Page Setup Magnifier Watermark Hand Tool Zoom Out Zoom % Zoom In Search Export Scale Email -Hi

Appendix

Data Binding

Is simply the process of binding/joining a field/control in the report to data stored in your WG or Customer record. For example, if you want to have a list of stock #'s and manufacturers, you would have two "label" type controls placed in the report detail section. However, in order to have the report print with any data, the control must be bound to a data source kept in the WG record.

How to bind data:

Drag and drop a field from the field list to the report design area as noted in the Field section above. (This method automatically binds the control to your data.)



Create a Calculated Field



Right click the mouse over the "Field List Section" (anywhere within the field list is OK).



Select "add calculated field". NOTICE: a new field named "CalculatedField1" is added to the field list once you selected "add calculated field".



While the new field is highlighted, right click the mouse and select "edit calculated field" to get the Calculated Field Collection Editor window to appear .



Functions preset formula outlines. Similar to Excel Functions.

Operators are what type of calculation you are performing: adding, subtracting, etc.

Fields list all available fields to perform your calculation on.

Constants list available formula options using true or false.

Parameters list any parameter fields you have created (see parameters section below).

Example:

To calculate projected profit using the following formula:

Asking Price- Cost=Profit

Enter the "Asking Price" Field into the expression editor by one the following methods.

Type the field name (exactly as entered in the field listing) directly in the Expression Editor, entering brackets around the name.

OR

Select fields to get a list of the available fields in the center window.

Scroll down center listing until you find the "Asking Price" field.



Expression I	ditor			
	Enter your fo or by selectir	/ typing		
+ -				\bigcirc \bigcirc \bigcirc
Functions Operators Fields Constants Parameters		(All) Abs() Acos() AddDays(,) AddHours(,) AddHours(,)	•	AddDays(DateTime, DaysCount) Returns a date-time value that is the specified number of days away from the specified DateTime.
Select item here to view a list of options available for writing a formula.		This list available functions. Double click on item to ente into expression editor.	r	This area provides information / description of what you have selected.





Double Click on the "Subtraction" sign. Notice how the subtraction sign is entered in the expression editor.

Same method as used for the "Asking Price".	[Asking Price] -[Cost]
When your formula looks like the example	$+ - \times \div \% (\cdots) = \neq < \leq \geq > \textcircled{O} \textcircled{O} \textcircled{O}$ Functions
Select OK to return to the Calculated Field Collection Editor screen. Select OK again to return to your report design.	Initiality Initiality Initiality Operators Image: Components System.Decimal Fields Image: Components System.Decimal Constants Image: Components System.Decimal Parameters Image: Components System.Decimal Image: Components Image: Components Image: Components Image: Components Image: Components System.Decimal Image: Components Image: Components Image: Components System.Decimal Image: Components Image: Components Image: Components Image: Components System.Decimal Image: Components Image: Components Image: Components Image: Components Image: Components System.Decimal Image: Components
	OK Cancel

To have that data in your	PageHeader [one band per page]
	y 🚍 GroupHeader1
newly created field from the	[NewUsed]
field list to the report layout	Stock # Serial # Cost Asking Price Profit/Loss
area	V E Detail
	[StockNumb [SerialNumber]
- - -	PageFooter [one band per page] Wednesday, December 28, 20

Create a Parameter Field

Creating a parameter is much like creating a calculated field. However where a calculated field calculates automatically when the report is run, a parameter usually does not. Therefore once you create a parameter field, when your report runs, you are prompted for data before the report preview appears.



Right click mouse over the parameter field.

Select "Add Parameter" to open the Parameter Collection Editor and enter a new name for the field.



TIP: Field names cannot contain spaces or special characters. So if you want to have a name with more than one word and have it be easier to read, capitalize the first letter of each word without spaces. (i.e., for a field name of "Start Date" you would enter "StartDate", which is easier to read than startdate).



Enter a description. This is where you type the name as you want it to appear ie. Start Date (with spaces).



Select a data type, i.e., if date select DateTime.

TIP: A value is only entered if you want a
default value that will not change at run
time.



TIP: To get data that is within a range of dates you must create 2 parameter fields. Usually "Start" and "End".



Select OK to return to the report design.

TIP: To create another parameter field without returning to the report design, select Add and repeat steps above.

Parameter Collection Editor				? 🗙
Members: 0 StartDate 1 EndDate Add Remove	•	StartDate properties:	Yes Start Date DateTime StartDate	
		0	K Cano	el

Once you return to the Report Design, you must now set a Filter in the Report Properties in order for the parameter to work.



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Left click on the box in the upper left had corner of your report to open the Report Tasks Window.

Select on the filter String box to open the filter string editor.

		. 2	
	Report Tasks		
<u> </u>	Design in Report Wizard… Edit and Reorder Bands…		
1	Data Source	WholegoodData 🔹	
-	Data Member		
1	Data Adapter	(none) •	
•	Filter String	· · · · ·	1
ŀ	V Print when Data Source is Empty		E
•	Detail Print Count when Data Source is Empty	1 +	
Ξ	Detail Print Count	0 ‡	
:	Measure Units	Hundredths of an Inch 🔹	1
	Formatting Rules	(Collection) ····	
:	Formatting Rule Sheet	(Collection) ····	
	Style Sheet	(Collection) ····	
	Watermark	(None) ····	
		■ Report Tasks Design in Report Wizard Edit and Reorder Bands Data Source Data Member Data Adapter Filter String ■ Print when Data Source is Empty Detail Print Count when Data Source is Empty Detail Print Count ■ Formatting Rules • Formatting Rule Sheet Style Sheet Watermark	Report Tasks Design in Report Wizard Bilt and Reorder Bands Data Source WholegoodData Data Member Data Adapter Filter String Image: Print when Data Source is Empty Detail Print Count Image: Detail Print Count Image: Point Rules Image: Point Rules Image: Collection Image: Point Rule Sheet Image: Style Sheet Watermark

The filter string editor works like other areas within RIMSS program. In the example shown, we are selecting WG records with sales dates between Start Date and End Date based upon our parameter fields. To connect our Sold Date field to the parameter field, Click on the next to <enter a value> until it

turns to

FilterString Editor

Visual
Text

And O

__[Sold Date] Is between ?StartDate

O

OK

Cancel



TIP: The default entry is your 1st parameter field. Click on ?fieldname to bring down a drop down listing of ______ parameter fields to choose from .

Select OK to return to the Report Tasks window.



Click inside the report Design to close the Report Tasks window.

Click on Preview from the Report Command bar at the bottom of the Report Design window.



		2	1 88 11 tay 11	18 8 6
REMEMBER : Parameters are in report. Therefore, the system you do not enter data when pr are looking for. For example the not have any items sold on Jan blank.	tems that happen at the time you run the will prompt you to enter the parameters. I compted, you may not get the results you he picture shown is the default. If you do uary 1 in the year 0001 your report will be	F Start I End Da	neters Date 1/1/0001 ate 1/1/0001 Reset	4 ×
Click into the Start Date Field a	and change the date.			
Tab or Click into the End Date	Field and change the date.			
report based upon your param	eters.			
Reset Submit	🛞 RIMSS Proj	ected F	Profit on	Sales
	Stock # Serial # 27041 JTC92402	Cost	Asking Price	Profit/Loss
	90143 BH290143	0.0000	0.00	0.0000
	an286385 an286385	0.0000	115704.00	 115704.0000
	an286385 an286385	0.0000	115704.00	115704.0000
	RENTAL RENTAL TRACTOR TRACTOR	50868.0000	0.00	-50868.0000



TIP: You can change the parameters and resubmit your report without exiting the report as many times as you like. However if you make changes to your data in your WG record and you want that updated information to be included in your report, you must exit the report, refresh your data, and then run again.

Formatting Beyond the Property Grid

Each control or object within your report has some additional formatting options available when you select next to the object which will open up a task window. The options change depending what object you have selected (see details in pictures below).

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	RIMSS Pro
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▼ 🗐 PageFootel [one band per Thursday, December	r page] r 29, 2011
PageHeader [one band per	RIMSS Pr
▼ 🚍 GroupHeader1 🔉	
[NewUsed]	
Stock #	Serial #
🔻 🗐 Detail	

Page Header Ta	sks	
Edit and Reorder	Bands	
Print On	All Pages	
Formatting Rules	(Collection)	

Page Header Tasks

Print On – Select when you want the header to print. The pull down menu gives you several options.

Formatting Rules: Set up Conditional formatting options that can be entered once but applied to multiple report objects versus having to write the formula for each control.

Label Tasks

Text – Is the control identifier. You can change this by deleting the default and typing in another field name.

Data Binding – Is how you have bound the field or where the data is being supplied from. You can change the binding by selecting a field from the pull down menu.

Format String - Select from predefined formats for how you want your data to be formatted within that field. (see picture)

Summary - Opens the summary Editor. Allows you to count any field type or do average, get minimum or maximum values or summarize numeric fields. You select whether you want these options to effect your total report, page or group. In other words you can create subtotals using this feature. (see picture below)

Angle – Set the angle that you want your data to be displayed. Most useful for column/data labels not on the data itself.

Anchor Vertically – Sets how the data is anchored-top, bottom or centered.

Formatting Rules – Set up Conditional formatting options that can be entered once but applied to multiple report objects versus having to write the formula for each object.

Auto Width – System sets field width based upon data size.

Can Grow – Allows the field to grow with the size of data. Need to have the Word Wrap checked for this to work properly.

Can Shrink – Allows the field to shrink if it contains no data, i.e., some addresses have 2 lines where others have 1. Your design needs to have both fields but if the address only has 1 line you don't want to have a blank line so this options will eliminate the blank line.

Multiline – If data has multiple lines (i.e., a memo field) it will print all data

Label Tasks		
Edit Text		
Text	label2	
Data Binding	WholegoodData - NewUsed	•
Format String		
Summary	None	
Angle	0	¢
Anchor Vertically	None	•
Formatting Rules	(Collection)	
🗌 Auto Width		
🗹 Can Grow		
🗌 Can Shrink		
Multiline		

🗸 Word	d Wrap
--------	--------

FormatString Editor Category Sample DateTime ### Number Percent Standard Types Custom Currency Special Suffix: Prefix General Cancel OK

mmary conor			
Bound field:			
StockNumber		•	
Summary function:			5 coults
Sum		•	7
Format string:			-2 5 4
			10
🔲 Ignore null valu	es		3
Summary Running	9		
None	O Group		
O Page	O Report		

Group Header Tasks

Group Fields – select what fields are being grouped and what sort order. (see picture)

Group Union – select how you want the data to print. Can it split between pages or do you want to keep it all on one page?

Level – Sorting level – Sort order of group bands. If you have 2 group bands (i.e., new/used and Fuel Type) do you want your data grouped first by fuel type then New/Used or do you want

Group Header Tasks					
Edit and Reorder	Bands				
Group Fields	(Collection)				
Group Union	None	•			
Level	0	÷			
Sorting Summary	(Group Sorting Summary)				
Formatting Rules	(Collection)				
Keep Together					
🔲 Repeat Every	Page				

group first by new/used then fuel type. There is no correct way to sort, it just depends on what makes your

report display the information in the way you want.

Sorting Summary – If other sorting options have not been set you can set summary options. (Works the same as in the Summary in the Label Tasks)

Formatting Rules - See previous formatting rules in Label Tasks area.

Keep Together – works like the Group union. You either have it on or off.

Repeat Every Page – Do you want the group header to print on every page or only at the beginning of the group of data.

G	roupField Collection Editor				?×
	Members: D GroupField Add Remove	*	GroupField properties	NewUsed Ascending	
				K Canc	el .:

Grouping Data to Format Your Report

Grouping data can draw your attention to a variety of information by placing headers and footers in your report. Headers usually contain data that defines what is in the group and footers usually contain summary information. In the examples below both headers and footers have been used. The data is the same in each example, however, it is grouped and totaled differently. The first is grouped and totaled by Fuel type – maybe you want to see if WGs sell faster depending on their fuel type. The second is grouped on WG type – maybe you want to see if your "used" products sell faster than your "new" products. To group data you must insert a header or footer "Band" into your report.

	Days to Sale				
Diesel					
Stock #	Serial#	Arrival Date	Sale Date	Sale Days	
Used 450	4H655225	01/01/2011	04/06/2011	95	
New					
4546	12456478999999	07/17/2010	08/19/2010	33	
09B100	1GBHG31K4TF010001	05/04/2009	05/06/2009	2	
09B050	1gdhg15rasd6546	04/24/2009	04/24/2009		
		01/15/2009	01/28/2009	13	
8974974654	454965469541	12/15/2008	01/15/2009	31	
RAC254N	WHS7E254	02/15/2009	04/01/2009	45	
		L	AVG Sale Days	31	
Gas					
Stock #	Serial #	Arrival Date	Sale Date	Sale Days	
Used		02/01/2009	02/03/2009	2	
New					
04UB274	1GDK6P1B4FV515798ABC	11/05/2004	05/21/2009	1.658	

	Days to Sale				
Used					
Stock # Diesel	Serial #	Arrival Date	Sale Date	Sale Days	
450	4H655225	01/01/2011	04/06/2011	95	
Gas		02/01/2009	02/03/2009	2	
Propane FT2000		01/01/2009	01/06/2009	5	
27041	JTC92402	06/01/2011	09/01/2011	92	
		AV	'G Sale Days	49	
New Stock #	Serial #	Arrival Date	Sale Date	Sale Davs	
Diesel	o on an		our bai	oulo Bujo	
RAC254N	WHS7E254	02/15/2009	04/01/2009	45	
8974974654	454965469541	12/15/2008	01/15/2009	31	
		01/15/2009	01/28/2009	13	
09B050	1gdhg15rasd6546	04/24/2009	04/24/2009		
09B100	1GBHG31K4TF010001	05/04/2009	05/06/2009	2	
4546	12456478999999	07/17/2010	08/19/2010	33	
Gas					
RAC830	P93G5684	03/15/2009	04/01/2009	17	



Inserting a group header or footer

band: Place mouse over report section and right click. Select Insert Band, and select the type of section you are going to insert.





≥.

Enter the properties of the band by selecting the band and clicking on:





Select Group Fields to enter the Group Field Collection Editor.
Select Add
Select the field you want to group by from the pull down menu
Select whether you want your list to sort Ascending A-Z or
Descending Z-A

Select OK to return to your Report Design Window.

Repeat these steps for each grouping you may want to have in your report.

Group Union: Set how you want your data to display when it crosses into more than one page. The best way to see how this works is to select the option and see what happens when your report displays.

Level : In the examples on the previous page there are two group bands: GroupHeader 1 is grouping on Fuel Type and Group header 2 is grouping by WG Type (new or used). The difference between the two reports is the **Level** of grouping set in the "band" properties. The level number reflects which grouping is done first. In the 1st report example, Group header 1 has a level of 1 and header 2 is 0. In the 2nd example by type, the group header 2 is level 1 and group header 1 is level 0.



Sorting Summary: When in Group Band, the sorting summary option's default is not to have any options because summary options are usually set on a specific field/control and placed with in a group header or footer.

Formatting Rules: See **Conditional Formatting** on details relating to this.

Keep Together: If checked doesn't allow data to split between pages.

Repeat Every Page: If checked and your report is more than one page, the header contents prints on every page.

Group Header Tasks					
Edit and Reorder	Bands				
Group Fields	(Collection)				
Group Union	None	•			
Level	0	÷			
Sorting Summary	(Group Sorting Summary)				
Formatting Rules	(Collection)				
Keep Together					
🗌 Repeat Every	Page				



TIP: Header 1 will always be matched to footer 1 if you have both a header and footer. In other words, in our example where our group 1 header is grouped on fuel type and we have it averaging/totaling the Sale Days, we also have a group footer 1. Therefore at each change in fuel type the report will print the average sales days by that group not by any other.



TIP: Any data entered in a Group header or footer section will print when the grouping changes . See the example on previous page where Stock#, Serial #, Arrival Date, Sales Date, and Sale Days column headers repeat when a new group of data starts (i.e., Diesel, Gas, Propane in example 1 or Used or New in example 2). The "Average Sale Days" totals repeats at each change in the groups footer section.

Conditional Formatting

Conditional formatting is formatting that happens on a control only when a certain condition(s) is true. You can create many rules at one time but they will not take affect until you apply that rule to a control. You can pick all established rules or just 1 rule for a control.

For example: The Service Department of your company performs inspections when a WG arrives at your location and prior to the WG being sold/delivered to your customer. You want to track the serial # of the propane tank installed for warranty and recall purposes. The serial number is only available when you can look at the tank during inspection. Your Service Department uses an inspection form which is printed and lists items that are checked on all WGs and also lists specific conponents to that WG from the WG custom reports. Because not all WG have propane tanks installed it is not a regular item to check. So you can set conditional

formatting options to highlight the control on the form for the SN if it has a propane tank installed to draw attention to the fact that the this WG has a propane tank installed and that we need the SN.



Open the Formatting Rules Editor from the control's property listing:

Select Edit Rule Sheet to open the Formatting Rule Sheet Editor



Select to add a new formatting rule:



Select formatting options from the Behavior box





Rename the Formatting Rule

TIP: Because you can use the same rule on several controls that are dependent on the same criteria, name the rule something that is descriptive of what you are doing, i.e., HighlightPropaneSN.

Select the ... in the condition field to open the condition editor. This is where you will define when the condition happens.







Enter a formula



Select OK to return to the Formatting Rule Sheet Editor

 Select Close when you have set all conditions and formatting to return to the formatting rules editor.



TIP: You must apply the rule to the control or no formatting changes will take affect when the condition is met.

Select to apply the conditional formatting to the selected control (notice how the rule moves from the left column to the right column noting that the rule has been applied.).



Rules available in a report:	.0	- Rule	es applied to a contr	ol: _0	
HighlightPropaneSN		>			*
		>			4
		<			
ormatting Rules Editor					
- Rules available in a report:	.0	- ^C Rul	es applied to a contr	ol: .0	
			phlightPropaneSN		
57 C		>>			-
		<			
6					3
00		12			0
10		.0			
. 24					1
Edit Rule Sheet					
1		0			



Totals / Subtotals

Place totals or subtotals in your report by using the summary editor withing the properties of your control. Controls that total operate differently depending on which **report band** you place them in and which summary function you choose in the a control's properties summary options.

Totals placed in the report footer (usually a grand total), page footer (usually a subtotal), in a group footer

(usually a subtotal), or in the detail section (usually a running total).

Use the Summary Editor in the formatting options (see Formatting beyond the property grid) to place totals in your report.

Bound Field: Is the data field in which you are performing the summary function.

Summary Function: What type of summary are you wanting to perform on the bound field, i.e., do you want to count the

number of WG selected or do you want to sum the total of a column. See table for what Summary functions can be used on what type of field.

			<u> </u>	ommon Sun	mary Functio	ns		
		Sum	Count	Average	Running Summary	Percentage	Max	Min
	ab Alpha/Text							
types	Date/Time		1					
ield data	123 Numeric	\checkmark			>	*	~	
Ч	Check / Yes/No		*					
	f Numeric Calculated	V		*	*	*	1	

itockNumber		•		
ummany function			5	
Sum			<null></null>	
aun:			-2	
ormat string:			5	
			4	
			3	
Ignore null values			32	
Summary Running				
None	O Group			
O Page	O Report		311	
	100000000000			

Formatting String: Select how you want your data to look in the field.

Ignore Null values: if selected the summary does not include entries without data into the equation. For example, if you are performing a count on the [StockNumber] field and the WG record doen't have a stock number, it would not count it.

Summary Running: Select whether you want your calculation to include data from:

Page: any entries that fit on the page

Group: any entries within a group

Report: totals all entries for the report

FormatString Edi	tor	
Category DateTime Number Percent Currency Special General	Sample ### Standard Types Prefix:	Custom
		OK Cancel

Filtering Data

Filter data to refine your results.

Methods to filtering report data

Prefetch filters or Auto Filter Line – Located under the column headings in the data grid area on your WG Master List or Customer Master List. Once data is selected open your report. Only selected data will be included in your report results.

Or



Report properties – Filter String

option>Select [©]>select data field by clicking on "default" field to open drop down of all available fields> >select operator>enter data to filter by?>select OK.



TIP: Filter string field now shows whether you have entered a filter using this method.

Or



Parameter – Add a parameter field to do "runtime" filtering as discussed in the Creating Parameters section earlier.



TIP: The Report properties and Parameters methods are the most efficient methods for filtering data for a custom report. The Prefetch or Auto Filter Line method for filtering report data works but takes more time to run rather than selecting all data to start and filtering using the other two methods. The slowdown in speed comes from the fact that if you determine your filter is not correct, because your are missing data that you know should be included, you do not have to exit the report, return to the master list, change your filter, refetch the data, reenter the report. By using the Report Properties and Parameter methods all that is required to change the filter, is to reenter the properties and change the filter or change the parameters at run time. The one exception is that if the data is incorrect in the record then you are required to exit, change the data in the record, refetch your data, enter the report, and finally run it again.

	System ID	Stock #		Description		Catego	bry	Group		Clas	s 🗋	
-						All	4	All	4	All	4	
	Serial #	Sales S	Status	Make	j.	Model		Rental Sta	tus 👘	New	/Used	Co
		All	4	All	4	All	4	All	4	All	4	> W
		100			20	1) **	1 - 0		Sul		19(*) *	11
Dra	ag a column head	er here to gr	oup by tha	t-column.								
	Inactive Sys	tem ID S	tock #	Fleet Number	Bo	dy Number	Serial #		Owne	r		
_			_			*						
7				1					Į			
	False	3718					7PX58677	2	Steve	Simons ((1524)	
	False	3957		80			1N9FLAC	.85C084247	Sunse	t Empire	Transporta	tion (6
	False	4214							Stephe	ens, Orir	1 (1331)	
	False	4228					46GED04:	17M2042246	Johnso	on RV Sa	iles (1239)	
	False	4229					46GED04	17M2042246	Johnso	on RV Sa	iles (1239)	
	False	4230					4UZAB2D	C46CX21505	Johnso	on RV Sa	les (1239)	100
a Ack ar Str	ipber ng when Data Source is		(none) [SoldDate] B	+ Vetween(?StartDate, ?							a ArrivaDe a ArrivaDe a Asking Pi a Asking Pr a Ade Rat	nte Strin rice ice io
eil Pri	rk Count when Data 3	iource is Emply	1			Fil	terString E	ditor				
ailPri	ck Count		0	:	ľ	DSI I	/isual Text	1				
15120	(Inits		Hundredths	of an inch 🔹		ICo: A	nd ©					
			200 B 10 B				-[Sold Date]	A Is between	• ?Start	tDate 🔒 a	nd ?EndDate (9.0
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m attir	ng Rule Sheet		(Colection)			1.111		Is greater the Is greater the	an an or eque	siba		
le She	et.		(Colection)					< Is lass than Is lass than o	r equal to	8		
corne			(NOLIS)					🕰 1s between		11		
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								 Is not blank Is any of 				Series (
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								Is later this m to next week	nonith	0	Foregroun	Bia
											and the second se	
								Is later this w	eek.		Formatting (Collection

Custom Report Examples

Example 1 - Recreated form with parameters set to filter by WG.



▼ 🗏 PageHeader [one band per page]

DMV DEA VEHI	LER NOTICE OF CLE PURCHASE	DEALER NOTICE OF VEHICLE PURCHASE
INSTRUCTIONS:		INSTRUCTIONS:
 Submit this form ONLY for Oregon this form if the vehicle is titled in an Complete this form immediately af interest of an Oregon titled vehicle The Vehicle Identification number If you fail to provide accurate, legil DMV will not be able to update the in compliance with ORS 803.092() Mail the white copy to DMV Recor Salem OR 97314-2250. Detail OREGON PLATE NUMBER: 	titled vehicles. DO NOT submit other jurisdiction. er the purchase or transfer of MUST be complete and correct. e and complete information, vehicle record and you will not be ()(b) and 803:105(1)(b). I Services, 1905 Lana Ave NE,	 Submit this form ONLY for Oregon titled vehicles. DO NOT submit this form if the vehicle is titled in another jurisdiction. Complete this form immediately after the purchase or transfer of interest of an Oregon titled vehicle. The Vehicle Identification number MUST be complete and correct. If you fail to provide accurate, legible and complete information, DMV will not be able to update the vehicle record and you will not be in compliance with ORS 803.092(2)(b) and 803.105(1)(b). Mail the white copy to DMV Record Services, 1905 Lana Ave NE, Salem OR 97314-2250.
	Đ	
[SerialNumber]	0	[SerialNumber]
OREGON TITLE NUMBER YEAR [Year]	MAKE BODY STYLE Chassis Make	OREGON TITLE NUMBER YEAR MAKE BODY STYLE
DATE OF PURCHASE		DATE OF PURCHASE
PURCHASED FROM		PURCHASED FROM
[Source]		[Source]
DEALER INFORMATION	MUST BE COMPLETE	DEALER INFORMATION MUST BE COMPLETE
DEALER NUMBER DA 1670	01/20/2012	DEALER NUMBER DA 1670 01/20/2012
Western Bus Sales, Inc.		DEALER NAME Western Bus Sales, Inc.
30355 SE Hwy 212		30355 SE Hwy212
City Boring	ZIP CODE 97009	Citry ZIP CODE Boring 97009
735-165 (12-02)	STK# 300092	735-165 (12-02) DFALER STK# 300

Example 1 Design View



DEALER NOTICE OF VEHICLE PURCHASE

INSTRUCTIONS:

- Submit this form ONLY for Oregon titled vehicles. DO NOT submit this form if the vehicle is titled in another jurisdiction.
- Complete this form immediately after the purchase or transfer of interest of an Oregon titled vehicle.
- The Vehicle Identification number MUST be complete and correct.
- If you fail to provide accurate, legible and complete information, DMV will not be able to update the vehicle record and you will not be in compliance with ORS 803.092(2)(b) and 803.105(1)(b).
- Mail the white copy to DMV Record Services, 1905 Lana Ave NE, Salem OR 97314-2250.

OREGON PLATE NUMBER:

REMOVED

/EHICLE	IDENTIFICATION	NUMBER	(MUST BE	COMPLETE)	

1GBHG312471161962

OREGON TITLE NUMBER YEAR MAKE BODY STYLE
2007 CHEVROLET

DATE OF PURCHASE

03/13/2007

PURCHASED FROM

✓ DEALER INFORMATION MUST BE COMPLETE ✓

DMV

735-165 (12-02)

Boring

DMV	
DEPARTMENT OF TRANSPORTATION	
1905 LANAAVE NE SALEH OREGOIST314	

DEALER NOTICE OF VEHICLE PURCHASE

INSTRUCTIONS:

- Submitthis formONLY for Oregon titled vehicles. DO NOT submit this form if the vehicle is titled in another jurisdiction.
- Complete this form immediately after the purchase or transfer of interest of an Oregon titled vehicle.
- The Vehicle Identification number MUST be complete and correct.
- If you fail to provide accurate, legible and complete information, DMV will not be able to update the vehicle record and you will not be in compliance with ORS 803.092(2)(b) and 803.105(1)(b).
- Mail the white copy to DMV Record Services, 1905 Lana Ave NE, Salem OR 97314-2250.

OREGON PLATE NUMBER:

REMOVED			
VEHICLE IDENTIFICATION NUMBER (MUS	T BE COMPLETE)		
1GBHG312471161962			
OREGON TITLE NUMBER	YEAR 2007	CHEVROLET	BODY STYLE
DATE OF PURCHASE			
03/13/2007			
PURCHASED FROM			
▼ DEALER INFORM	ATION MU	ST BE COM	PLETE 🔻
DEALER NUMBER		DATE 01/20/2012	
DA 1070		01/20/2012	
Western Bus Sales, Inc.			
DEALER ADDRESS 30355 SE Hwy 212			

DEALER

спу Boring

735-165 (12-02)

ZIP CODE 97009

STK# 300092

Example 1 - Output

97009

STK# 300092

Example 2 - Report created to fill a form provided by other agencies/organizations. Only fields to be completed are included in the design.



[SerialNumber]	[Year] [ChassisMak]
[Customer Name]	[Paramete₽
[AddressFull]	
Parameters.	
Western Bus Sales, Inc.	
Donna Bracy	
20255 SE Huar 212 Baring OD 07000	DA 1670 503-005-0002

Example 2 Design View

-			
	1BAAHCPA41F097869	2001	
	Willsmette Lesdership Academy		01/01/2012
	87230 Central Rd, Eugene, OR 97402		
	102,000 Western Bus Salas Inc		
	Donna Bracy		
	30355 SE Hwy 212, Boring, OR 97009	DA 1670	503- <mark>905-0002</mark>

0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0

00	dometer dis	closure is a Class C felony (ORS	815.430).	nsonment. Onc	ter Oregon iaw,	the offense of	submitting a fais
LATE N	UMBER	VEHICLE IDENTIFICATION NUMBER		YEAR	MAKE	STYLE	MODEL
		1BAAHCPA41F0978	69	2001			
		I certify the vehicle describe	ed above has been trans	terred to the fo	llowing (signat	ure certifies to	o odometer
ш	סס	BUYER'S PRINTED NAME	erest in the venicie).			DATE OF SALE O	OR TRANSFER
2	an	Willamette Leadershi	01/13/2012				
F	ldn (s).	BUYER'S ADDRESS					
ц	am ler(87230 Central Rd, EL	igene, OR 97402				
2	d n sel	ODOMETER READING (NO TENTHS)	I certify to the best of m	y knowledge that	the The mile	age stated is in El	KCESS of its
z	and	102 000	vehicle UNLESS one of the	following statement	s is The odo	meter reading is N	OT the actual mileage
ME	prir s) a	102,000	checked:	C	WARNI	NG - ODOMETER	DISCREPANCY
Z	as her	SELLER'S PRINTED NAME		SIGNATUR	E		
S	are; g th buy	Western Bus Sales, Ir		SIGNATUR	E		
ŝ	of	Denne Drach	HOON SIGNING FOR BUSINESS)	Gianaro	2		
L	cluc	SELLER'S ADDRESS (IF DIFFERENT FROM FI	RONT OF TITLE)	DEALER/W	RECKER NUMBER	TELEPHONE NU	MBER
S.	in atu	30355 SE Hwy 212 E	Roring OR 97009	-	DA 1670	503	3-905-0002
臣	ssi vllu ign	I am aware of the above	odometer disclosure ma	de by the selle	r/agent.		000 000L
_	Alls	BUYER'S PRINTED NAME		SIGNATUR	E		
NENT OF	ist be cor nted nam and seller(ODOMETER READING (NO TENTHS)	I certify to the best of m odometer reading is the vehicle UNLESS one of the	y knowledge that actual mileage of following statement	the The mile the mechan s is The odo	age stated is in El cal limits. meter reading is N	CESS of its
Z	pri (s)		checked:		WARNI	G - ODOMETER	DISCREPANCY
SIG	the uyer	SELLER'S PRINTED NAME	× ~	SIGNATUR	E		
AS	int al iding	SELLER'S PRINTED NAME (IF BUSINESS, PER	RSON SIGNING FOR BUSINESS)	SIGNATUR	E	1.	· .
DND	gnme inclu atures	SELLER'S ADDRESS (IF DIFFERENT FROM FI	RONT OF TITLE)	DEALER/W	RECKER NUMBER	TELEPHONE NU	MBER
ö	llly igna	I am aware of the above	odometer disclosure ma	de by the selle	r/agent.		
S	Alls	BUYER'S PRINTED NAME		SIGNATUR	E		
щ	and	I certify the vehicle describe disclosure and releases inte	ed above has been trans erest in the vehicle):	ferred to the fo	llowing (signate	ure certifies to	odometer
E	ple ().	BUYER'S PRINTED NAME				DATE OF SALE O	OR TRANSFER
F	ame er(s	BUYER'S ADDRESS	2		· · · · · · · · · · · · · · · · · · ·		
JENT O	nust be o printed na t) and sell	ODOMETER READING (NO TENTHS)	I certify to the best of m odometer reading is the vehicle UNLESS one of the obsckad:	y knowledge that actual mileage of following statement	the The mile the mechan s is The odo	age stated is in EX cal limits. meter reading is N	CESS of its
N	is r ie p er(s	SELLER'S PRINTED NAME	undertoo.	SIGNATUR	E	G - ODOWETER	DISCHEPANUT
5	th						
S	a ng	SELLER'S PRINTED NAME (IF BUSINESS, PER	RSON SIGNING FOR BUSINESS)	SIGNATUR	E		
0)	0 = 5						

Report 2 Print Preview

69602-06/3186

Example 3 – Bill of sale

						WESTERN BU	S SALES, IN	IC.
	- D	L.				30355 S.E. H	IIGHWAY 212	
		Ħ			(800	BORING, 1 258-2473 Toll Free	OR 97009	02 Phone
	9				1000	(503) 905	-0003 Fax	ALC STRUCT
WESTERN	BUS SALES	INC				www.west	tembus.com	
WESTERIN	DUS SALLS	, 1140.						_
			BILI	OFS	ALE			
GrounHeade	r1							
Western Rus C	ales les the CE	ILED in	oo oo aidaratii	on of the s	um of the	dollars listed halo	w hereby zesi	ana and
transfers unto:	ales, me., me se	LLLK, IN	CONSIDERAL	on of the a	IIII OI BIC	uonaisnsieu beiu	w, nereby assi	iyiiə aliu
SOLD TO: [Ov	vner]			G)			
[Bu	sinessAddress1]			6)			
[Bu	sinessAddress2]			G)			
(Bu	sinessCity]	G [Busin	e😡 [Busine	ssZip] 🕻	PHON	E [BusinessPhon	8]	
Detail	1.1.1.2.2.1.1.1.2.1.1.1	0		1.221.01.01.0				0
Detail [StockNumber]	[SerialNumb	oerj 😡	Chassis	[Chassis	Vake] G	[Body make]	Sales Price	(bij G i
Detail StockNumber GroupFooter	jSerialNumb 1	oerj 🕛 j	Chassis	Chassis	Make] G	Body make]	Sales Price	[61] <mark>[</mark>
Detail StockNumber GroupFooter Each vehicle is	jSerialNumb 1 sold AS-IS, WH	erj 🕡	Chassis	[Chassis ER makes	Make] C	[Body make] (RANTY, either EXP	ISales Price	IED, as t
Detail StockNumber GroupFooter Each vehicle is the condition o	[SerialNumb 1 sold AS-IS, WH f such vehicle(s	enj 💽 EREIS, ar), or as to	Chassis d the SELL the SUITAB	Chassis ER makes BILITY of su	Make] C NO WAR ch vehicl	Body makes RANTY, either EXP le(s) for the BUYEF	Cales Price	IED, as t
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WESTERN BUS SALES, INC. 30355 S.E. HIGHWAY 212 BORING, OR 97009 (800) 258-2473 Toil-Free (503) 905-0002 Phone (503) 905-0003 Fax www.westernbus.com

BILL OF SALE

Western Bus Sales, Inc., the SELLER, in consideration of the sum of the dollars listed below, hereby assigns and transfers unto:

SOLD TO: Willamette Leadership Academy (2017)

87230 Central Rd		

Eugene	OR	97402	PHONE	(541)935-6815

the BUYER, the following vehicle(s) free and clear of all encumbrances:

STOCK #	VIN #	YEAR	CHASSIS MAKE	BODY MAKE	PRICE	ID
11UB045	1BAAHCPA41F097869	2001	BLUE BIRD	BLUE BIRD	\$20,000	4548

Each vehicle is sold AS-IS, WHERE IS, and the SELLER makes NO WARRANTY, either EXPRESS or IMPLIED, as to the condition of such vehicle(s), or as to the SUITABILITY of such vehicle(s) for the BUYER'S INTENDED PURPOSE OR USE, nor does the SELLER make any REPRESENTATION or WARRANTY of any nature whatsoever with respect to such vehicle(s). All deposits held over ninety (90) days shall be considered NON-REFUNDABLE if the sale is not consummated within the ninety (90) day period.

SIGNED BY:

SIGNED BY:

WESTERN BUS SALES, INC.

Willamette Leadership Academy (2017)

DATE

NOTICE OF SALE OR TRANSFER

DATE TITLE RECEIVED: DATE SENT: RECEIVED BY:

Example 3 - Output 1

Example 3 - Design View 1

Example 4 – Report with custom formatting based upon the WG User status field.

			÷	F	Friday, Janua	ry 20, 2012	
	Status	Report					
WESTERN BUS SALES, INC.							
PageHeader [one band per page]							
Notes	Cust. Stock Body Bus # # #	Customer	Body Model	Org. RFD Date	Rev. RFD Date	SOS Date	SOS Detai
GroupHeader1							
WGUserStatus [Sort	Orderiu D SHEETS			NAVS			
	BOILD SHILL IS		10100 2-1	IAIS			
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Detail					and the second se		TOOL
Detail Notes]	[Flee] [StockN] [Body N] [Cus	tomer Name]	🔒 [Body Model]	Original R	[Revised fi]	SOS Date	120
Detail [Notes] PageFooter [one band per page]	[Flee] [StockN] [Body N] [Cus	tomer Name]	😡 [Body Model]	Original 🗗	[Revised f	[SOS Date	



Rule 1 - [WGUserStatus]='Here' OR[WGUserStatus]='Stock-Here' or [WGUserStatus]='Stock - Factory Ready'



Rule 2 - [WGUserStatus]='IN TRANSIT' OR[WGUserStatus]='Factory Ready' OR[WGUserStatus]='Factory-Customer Pickup' or [WGUserStatus]='At Transarctic - A/C Install'



Rule 3 - [WGUserStatus]='Stock-Factory' OR [WGUserStatus]='Stock - Pending'

formattingRule1	8≣ 2↓	
formattingRule3	Behavior	Q
formattingRule4	Condition	[WGUserStatus]='Stock
	Formatting	Background Color = ffc0.
	Background Color	192, 255, 192
	Border Color	(Not set)
	Border Dash Style	(Not set)
	Border Width	(Not set)
	Borders	(Not set)
10 B	formattingRule3	13

Rule 4 - [WGUserStatus]='Pending'



Notes Notes	Cust Bus#	Stock #	Body						
Notes Notes No up on LP prior to May / No CM's - No 2-Ways	Cust Bus#	Stock #	Body						
llow up on LP prior to May / No CMTs - No 2-Ways	BU		5 8 52	Customer	Body Model	Org. RFD Date	Rev. RFD Date	SO S Date	SO S Detail
Now up on LP prior to May / No CM's - No 2-Ways		ILD S	HEE	TS TO PDI * R	ADIOS * 2-1	NAYS			
lere	N/A	12G004	1228521	Oak Hill School	MB-IV	05/31/2012	05/31/2012	06/30/2012	Approx
	N/A	08L001	F153868	City of Wilsonville	XCEL 102	04/30/2008	05/30/2008	01/31/2012	Before
stock - Factory Ready									
CM's - No 2-Ways	TBD	118050	F428316	STOCK	BBCV2311	12/31/2011	12/31/2011	01/31/2011	TBD
CMs - No 2-Ways	TBD N/A	11B033 11H011	F427835 21633	Stock Stock	BBCV3310 EZ-Street	11/16/2011	12/15/2011		N/A
tock-Here	0.00.00	a state of the		- Contract			A DECOMPTON		
NOCK-TIEFE	-								-
red RO at Sale	TBD	108051	F421217	Stock - Soar Program	BBCV1910	02/01/2011	02/01/2011	03/01/2011	N/A
red RU at Sae	TRD	108052	F421218	Stock - Soar Program	BBCV1910	02/01/2011	02/01/2011	03/01/2011	NVA
and PO at Sale	TED	100000	E421221	Stock - Soar Program	BBCV2311	11/01/2010	11/01/2011	12/01/2010	NUA
and PO at Seb	TBD	108059	F421224	Stock - Soar Program	BBCV3310	11/01/2010	11/01/2010	11/01/2010	NIA
and RO at Sale	TBD	108064	F421230	Stock - Soar Program	D3RE4006	03/01/2011	03/01/2011	04/01/2011	N/A
aed RO at Sale	TBD	108093	F423274	Stock - Swap Your Bus	BBCV3310	03/15/2011	03/15/2011	04/15/2011	N/A
ed RO at Sale	TBD	10C016	47910	Stock	GRAND BANTAM 6	12/14/2011	12/14/2010	01/15/2011	N/A
ed RO at Sale	N/A	10V002	41633	Stock	CARAVAN	1	-		N/A
ed RO at Sale	N/A	11V001		Stock	CARAVAN				N/A
RDERED									
ov. 17th - Final Board Meeting Approval	6	118052	F429699	Ontario School District	BBCV3310	03/15/2012	02/13/2012	06/01/2012	Before
sv. 17th - Final Board Meeting Approval	7	11B053	F429700	Ontario School District	BBCV3310	03/15/2012	02/13/2012	06/01/2012	Before
) CM's - No 2-Ways	9	118054	F430372	Oregon National Guard Youth Challenge Program	D3RE4006	04/05/2012	04/05/2012	05/05/2012	Approx

Example 4 - Output 1

Example 5 – Report with parameters, group headers and footers with totals.

Paramet	ers	t d
FromDate	1/1/2011	4
ToDate	1/31/2011	4
•0	Reset	Submit
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	0.1	0

🔻 🗎 ReportHeader (one band per report)			
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WESTERN BUS SALES, INC.	[neponreal]	www.wes	ternbus.com
 PageHeader [one band per page] 			1
STOCK # Customer	Delivery Date Invoice Date Trade #	Sales Price Trade Amount	Sales \$ no Tax
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[NewUsed]			
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Qty. Count([StockNumber])	Grand Total	Sum([Sales Price Sum([TradeTTo	Sum([NetBusS
Highlighted Items	: Invoiced in System -No delivery date recorded. Fix on User Defined Tab of WG		
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Friday, January 20, 2012	1/1		

Example 5 - Design View 1

Control Control <t< th=""><th>5</th><th></th><th>M</th><th>lonthi</th><th>y Sales</th><th></th><th>30355 S.E. HIG BORING, OF (800) 258-2473 (503) 905-000 (503) 905-000</th><th>HWAY 212 897009 Toll-Free 2 Phone 03 Fax</th></t<>	5		M	lonthi	y Sale s		30355 S.E. HIG BORING, OF (800) 258-2473 (503) 905-000 (503) 905-000	HWAY 212 897009 Toll-Free 2 Phone 03 Fax
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New Support Section Operating Section (Section (Sectic) (Section (Section (Section (Sectic) (Section (Section (Sectic	STOCK #	Customer	Delivery Date	Invoice Date	e Trade#	Sales Price T	rade Amount	ales\$ no Tax
anuary Bit Hold Constant Colspan="2">Bit Hold Colspa	lew							
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Display Law Column Science Instant, No. 997, 0142011 Display Link Display Link <thdisplay link<="" td="" tha<=""><td>B070</td><td>Lane County School District No. 4J (257)</td><td>01/25/2011</td><td>01/25/2011</td><td></td><td>122,757.00</td><td></td><td>122,75700</td></thdisplay>	B070	Lane County School District No. 4J (257)	01/25/2011	01/25/2011		122,757.00		122,75700
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Bit? Law County Steed Direct No. 4 (27) 0 1/8 2011 10028001 10048100 10448200 <	B076	Lane County School District No. 4J (257)	01/28/2011	01/28/2011	10UB066/	106,493.00	1,500.00	104,993.00
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Construction Construction<	G016	Enu-Larine School Disting #1 (98) ESD 112/ Specialized Transportation Com Of	01/14/2011	01/14/2011		60 152 00		60 152 00
Image: Second	G018	ESD 112/ Specialized Transportation Coop (2) RSD 112/ Specialized Transportation Coop OS	2) 01/26/2011	01/26/2011	<u> </u>	68 118 00		68 118 00
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UB038 Gene Brvar Pisher (1956) 01/126/011 01/12/2011 1 2,00000 00 2,00000 UB047 Left Martial Arts Academy Inc (1916) 01/03/2011 00/03/2000 00/03/2000 5,60000 00/03/2000 5,60000 00/03/2000 5,60000 00/03/2000 5,60000 00/03/2000 5,60000 00/03/2000 5,60000 00/03/2000 5,60000 00/03/20000 5,60000 00/03/20000 5,6	anuary							
Stock # Custome Delivery Date Invoice Date Trade # Stock # Custome Stock # Stock # Custome Delivery Date Invoice Date Stock #	UB038	Gene Bryan Fisher (1926)	01/26/2011	01/25/2011		2,000.00		2,000.00
Stock Custome Delivery Date Trade# Stock Custom Stock	UB0/4	North Central Pric Saler (1549)	01/07/2011	01/07/2011			.00	21,500.00
STOCK # Customer Delivery Date Invoice Date Trade # Sales Price Trade Amount Sales 5 no Tax VIDUE 1/2 01/12/2011 01/12/2011 / 5,60000 0.0 5,60000 USING Taylor Bus Sales Inc (711) 01/12/2011 01/12/2011 / 5,60000 0.0 5,60000 USING Taylor Bus Sales Inc (711) 01/12/2011 01/12/2011 / 5,60000 0.0 5,60000 USING Taylor Bus Sales Inc (711) 01/12/2011 01/12/2011 / 5,60000 0.0 5,60000 USING Taylor Bus Sales Inc (711) 01/12/2011 / 5,60000 0.0 5,60000 USING Taylor Bus Sales Inc (711) 01/12/2011 / 5,60000 0.0 5,60000 USING Taylor Bus Sales Inc (711) 01/12/2011 01/12/2011 / 5,60000 0.0 5,60000 USING Taylor Bus Sales Inc (711) 01/12/2011 01/12/2011 / 5,60000 0.0 5,60000 <td< td=""><td>UB105</td><td>Taylor Bus Sales Inc (711)</td><td>01/14/2011</td><td>01/14/2011</td><td>- 1</td><td>5 600.00</td><td></td><td>5,600.00</td></td<>	UB105	Taylor Bus Sales Inc (711)	01/14/2011	01/14/2011	- 1	5 600.00		5,600.00
STOCK # Customer Delivery Date Invoice Date Trade # Sales Price Trade Amount Sales 5 no Tax UB131 Taylor Bus Sales Inc (11) 01/11/2011 / / 5,600.00 0.00 5,600.00 US131 Taylor Bus Sales Inc (11) 01/11/2011 / . 5,600.00 0.00 5,600.00 US1315 Taylor Bus Sales Inc (11) 01/11/2011 / . 5,600.00 0.00 5,600.00 US1315 Taylor Bus Sales Inc (11) 01/12/2011 / . 5,600.00 0.00 5,600.00 US1315 Taylor Bus Sales Inc (11) 01/12/2011 / . 5,600.00 0.00 5,600.00 US1310 Taylor Bus Sales Inc (11) 01/14/2011 01/12/2011 . 5,600.00 0.00 5,600.00 US1311 Taylor Bus Sales Inc (11) 01/14/2011 01/14/2011 . 5,600.00 0.00 5,600.00 US1313 Taylor Bus Sales Inc (11) 01/12/2011 . . 5,600.00 0.0 <t< td=""><td>UB107</td><td>Taylor Bus Sales Inc (711)</td><td>01/12/2011</td><td>01/12/2011</td><td></td><td>5.600.00</td><td>.00</td><td>5,600.00</td></t<>	UB107	Taylor Bus Sales Inc (711)	01/12/2011	01/12/2011		5.600.00	.00	5,600.00
UB111 Trylor Bus Sales Inc (711) 01/24/2011 7/2 5,60000 00 5,60000 UB113 Taylor Bus Sales Inc (711) 01/11/2011 01/11/2011 5,60000 00 5,60000 UB115 Taylor Bus Sales Inc (711) 01/11/2011 01/11/2011 5,60000 00 5,60000 UB116 Taylor Bus Sales Inc (711) 01/12/2011 01/12/2011 5,60000 00 5,60000 UB117 Taylor Bus Sales Inc (711) 01/12/2011 01/12/2011 5,60000 00 5,60000 UB120 Taylor Bus Sales Inc (711) 01/12/2011 01/12/2011 5,60000 00 5,60000 UB121 Taylor Bus Sales Inc (711) 01/12/2011 01/12/2011 5,60000 00 5,60000 UB121 Taylor Bus Sales Inc (711) 01/12/2011 01/12/2011 5,60000 00 5,60000 10/UB121 Taylor Bus Sales Inc (711) 01/12/2011 1/2 5,60000 00 5,60000 10/UB121 Taylor Bus Sales Inc (711) 01/12/2011 5,60000 00	UB108	Taylor Bus Sales Inc (711)	01/11/2011	01/11/2011	1	5,600.00	.00	5,600,00
Silis Taylor Bus Sales Inc (711) 01/11/2011 01/11/2011 / S.600.00 00 S.600.00 UB116 Taylor Bus Sales Inc (711) 01/11/2011 01/11/2011 / S.600.00 00 S.600.00 UB116 Taylor Bus Sales Inc (711) 01/12/2011 01/12/2011 / S.600.00 00 S.600.00 UB117 Taylor Bus Sales Inc (711) 01/12/2011 01/12/2011 / S.600.00 00 S.600.00 UB118 Taylor Bus Sales Inc (711) 01/12/2011 01/12/2011 / S.600.00 00 S.600.00 UB120 Taylor Bus Sales Inc (711) 01/12/2011 / S.600.00 00 S.600.00 UB121 Taylor Bus Sales Inc (711) 01/12/2011 / S.600.00 00 S.600.00 10UB121 Taylor Bus Sales Inc (711) 01/12/2011 / S.600.00 .00 S.600.00 10UB121 Taylor Bus Sales Inc (711) 01/12/2011 / S.600.00 .00 S.600.00 10UB121 Taylor	UB111	Taylor Bus Sales Inc (711)	01/24/2011	01/24/2011	1	5,600.00	.00	5,600.00
UB115 Taylor Bus Sales Inc (11) 01/11/2011 01/12/2011 / S.600.00 00 S.600.00 UB116 Taylor Bus Sales Inc (11) 01/12/2011 01/12/2011 / S.600.00 00 S.600.00 UB117 Taylor Bus Sales Inc (11) 01/12/2011 01/12/2011 / S.600.00 00 S.600.00 UB118 Taylor Bus Sales Inc (11) 01/14/2011 01/14/2011 / S.600.00 00 S.600.00 UB120 Taylor Bus Sales Inc (11) 01/14/2011 01/14/2011 / S.600.00 00 S.600.00 UB120 Taylor Bus Sales Inc (11) 01/14/2011 01/14/2011 / S.600.00 00 S.600.00 10U1211 Taylor Bus Sales Inc (11) 01/12/2011 01/12/2011 / S.600.00 00 S.600.00 10U12121 Taylor Bus Sales Inc (11) 01/12/2011 01/12/2011 / S.600.00 00 S.600.00 10U12121 Taylor Bus Sales Inc (11) 01/12/2011 01/12/2011 / S.600.00 00 S.600.00 10U12131 Taylor Bus Sales Inc (11) <	UB113	Taylor Bus Sales Inc (711)	01/11/2011	01/11/2011	1	5,600.00	.00	5,600.00
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STOCK # Customer Delivery Date Invoice Bas Sales Inc (71) 01/12/2011 / 5,0000 0.00 5,0000 UB130 Taylor Bus Sales Inc (71) 01/11/2011 01/11/2011 / 5,60000 0.00 5,60000 UB120 Taylor Bus Sales Inc (71) 01/11/2011 01/11/2011 / 5,60000 0.00 5,60000 UB121 Taylor Bus Sales Inc (71) 01/12/2011 01/12/2011 / 5,60000 0.00 5,60000 10UB121 Taylor Bus Sales Inc (71) 01/12/2011 01/12/2011 / 5,60000 0.00 5,60000 10UB122 Taylor Bus Sales Inc (71) 01/12/2011 01/12/2011 / 5,60000 0.00 5,60000 10UB132 Taylor Bus Sales Inc (71) 01/12/2011 01/12/2011 / 5,60000 0.00 5,60000 10UB133 Taylor Bus Sales Inc (71) 01/12/2011 01/12/2011 / 5,60000 0.00 5,60000 10UB133 Taylor Bus Sales Inc (71) 01/12/2011 01/12/2011 / <td>UBII6</td> <td>Taylor Bus Sales Inc (711)</td> <td>01/12/2011</td> <td>01/12/2011</td> <td></td> <td>5,600.00</td> <td>.00</td> <td>5,600.00</td>	UBII6	Taylor Bus Sales Inc (711)	01/12/2011	01/12/2011		5,600.00	.00	5,600.00
Stock # Customer Delivery Date Invoice Date Trade# Sales Inc (711) O1/14/2011 O1/12/2011 O S,600.00 O0	110110	Taylor Bus Sales Inc (711)	01/12/2011	01/12/2011	- /	5,000,00	.00	5,600.00
STOCK # Customer Delivery Date Invoice Date Trade# Sales Price Trade Amount Sales \$ no Tax January 1/2 1/2 1/2 1/2 1/2 1/2 10UB121 Taylor Bus Sales Inc (711) 01/12/2011 / 5,600.00 0.0 5,600.00 10UB122 Taylor Bus Sales Inc (711) 01/12/2011 / 5,600.00 0.0 5,600.00 10UB123 Taylor Bus Sales Inc (711) 01/12/2011 / 5,600.00 0.0 5,600.00 10UB132 Taylor Bus Sales Inc (711) 01/12/2011 / 5,600.00 0.0 5,600.00 10UB133 Taylor Bus Sales Inc (711) 01/12/2011 / 5,600.00 0.0 5,600.00 10UB137 Taylor Bus Sales Inc (711) 01/14/2011 / 7,700.00 0.0 7,700.00 10UB179 Taylor Bus Sales Inc (711) 01/14/2011 / 7,700.00 0.0 7,700.00 10UB179 Taylor Bus Sales Inc (711) 01/14/2011 / 7,700.00 0.0	UB120	Taylor Bus Sales Inc (711)	01/14/2011	01/14/2011		5,600.00	.00	5,600.00
STOCK # Customer Delivery Date Invoice Date Trade # Sales Price Trade Amount Sales % no Tax January 10UB121 Taylor Bus Sales Inc (711) 01/12/2011 01/12/2011 / 5,600.00 .00 5,600.00 10UB122 Taylor Bus Sales Inc (711) 01/12/2011 01/14/2011 / .5,600.00 .00 5,600.00 10UB132 Taylor Bus Sales Inc (711) 01/12/2011 01/12/2011 / .5,600.00 .00 .5,600.00 10UB132 Taylor Bus Sales Inc (711) 01/12/2011 01/12/2011 / .5,600.00 .00 .5,600.00 10UB133 Taylor Bus Sales Inc (711) 01/12/2011 01/12/2011 / .5,600.00 .00 .5,600.00 10UB137 Taylor Bus Sales Inc (711) 01/14/2011 01/14/2011 / .7,000.0 .00 .7,000.0 10UB179 Taylor Bus Sales Inc (711) 01/14/2011 01/14/2011 / .00 .7,000.0 .00 .7,000.0 10UB179 Taylor Bus Sales Inc (711) 01	riday, January 2	0, 2012		1/2				
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STOCK # Customer Delivery Date Invoice Date Trade# Sales Price Trade Amount Sales \$ no Tax January 10UB121 Taylor Bus Sales Inc (711) 01/12/2011 01/12/2011 / 5,600.00 0.00 5,600.00 10UB121 Taylor Bus Sales Inc (711) 01/12/2011 01/12/2011 / 5,600.00 0.00 5,600.00 10UB131 Taylor Bus Sales Inc (711) 01/12/2011 01/12/2011 / 5,600.00 0.00 5,600.00 10UB131 Taylor Bus Sales Inc (711) 01/12/2011 01/12/2011 / 5,600.00 0.00 5,600.00 10UB133 Taylor Bus Sales Inc (711) 01/12/2011 01/12/2011 / 5,600.00 0.00 5,600.00 10UB137 Taylor Bus Sales Inc (711) 01/14/2011 01/14/2011 / 7,700.00 0.00 7,700.00 10UB179 Taylor Bus Sales Inc (711) 01/14/2011 01/14/2011 / 7,700.00 0.00 7,700.00 10UB179 Taylor Bus Sales Inc (711) 01/14/2011	1							
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International states and (11) Of (11) <tho (11)<="" th=""> Of (11) <tho (1<="" td=""><td>100B121</td><td>Taylor Bus Sales Inc (711)</td><td>01/12/2011</td><td>01/12/2011</td><td><u> </u></td><td>5,600.00</td><td>00.</td><td>5,600.00</td></tho></tho>	100B121	Taylor Bus Sales Inc (711)	01/12/2011	01/12/2011	<u> </u>	5,600.00	00.	5,600.00
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10UB133 Taylor Bus Sales Inc (711) 01/12/2011 01/12/2011 / 5,600.00 .00 5,600.00 10UB177 Taylor Bus Sales Inc (711) 01/14/2011 01/14/2011 / 7,700.00 .00 7,700.00 10UB178 Taylor Bus Sales Inc (711) 01/14/2011 01/14/2011 / 7,700.00 .00 7,700.00 10UB178 Taylor Bus Sales Inc (711) 01/14/2011 01/14/2011 / 7,700.00 .00 7,700.00 10UB179 Taylor Bus Sales Inc (711) 01/14/2011 01/14/2011 / 7,700.00 .00 7,700.00 11UB032 Taylor Bus Sales Inc (711) 01/14/2011 01/14/2011 / 10,500.00 .00 10,500.00 11UB043 Taylor Bus Sales Inc (711) 01/14/2011 01/14/2011 / 10,500.00 .00 10,500.00 .00 10,500.00 .00 10,500.00 .00 10,500.00 .00 10,500.00 .00 .157,600.00 .00 .157,600.00 .00 .157,600.00 .00 .157,600.00	10UB132	Taylor Bus Sales Inc (711)	01/12/2011	01/12/2011	1	5,600.00	.00	5,600.00
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110 UB31/9 Taylor Bus Sales Inc (711) 01/14/2011 01/14/2011 / 7,70000 00 7,70000 110 UB032 Taylor Bus Sales Inc (711) 01/14/2011 01/14/2011 01/14/2011 10,50000 00 10,50000 Qty. 23 Mo. Sub Total 157,60000 .00 157,60000 Qty. 23 Grand Total 157,60000 .00 157,60000 Qty. 36 Grand Total 1,497,97800 5,500.00 1,492,47800	10UB178	Taylor Bus Sales Inc (711)	01/14/2011	01/14/2011		7,700.00	.00	7,700.00
I 105002 Layon Dus Sales Inc (711) 01/24/2011	10UB179	Taylor Bus Sales Inc (711)	01/14/2011	01/14/2011	<u> </u>	7,700.00	.00.	7,700.00
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Report Ideas – Your imagination is the limit

Window Signs - identify your WG on the lot

Missing data searches - Component serial numbers

Review & analyze - Duplicate information like component serial #, sales margins, days for delivery, interest days

Sales Reports – grouped by year, month, sales person, manufacturer, type, customer, state, county, yearly comparison, projections

Inventory - by finance company, for sale, new, used, stock, customer, aged

Licensing – Title Applications, odometer disclosures, license approvals, statement of error, MSOs, As Delivered

Warranty – Mfg. delayed warranty registrations, claim forms, procedures, service locations, maintenance schedules,

Correspondence – letters

Labels – files, packets

Accounting – credit limits, reconciliations, finance, Receivable - delayed incentives, pending trades, projected margins, job costing, commission calculations

Trend Tracking

Inspection Forms