Customer Viewers

If you've viewed any of the other TOD courses introducing Eagle viewers, you'll see that this session reviews how beneficial viewers can be when you need to display customer information in a flexible grid.

An Eagle viewer displays data that is populated from your Eagle system and enables you to manipulate it for whatever purpose that you need for the task at hand.

In this course, we will set up, save, print, and export customized customer views. Let's take a look.

Topics

- Accessing Viewer
- Manipulating Columns
- Printing and Saving

Accessing Viewer

To access the Customer Viewer, open Customer Maintenance by selecting Customer Maintenance from the Accounts Receivables menu then Click View Cust in the ribbon menu or press F9.

The first step in building your viewer is to choose how you want the viewer data to be selected for your view.

You will do this by clicking the "Change Lookup" hyper link just below the ribbon menu. If you select Account Balance as the Lookup Type, it has built-in sort features which allow you to filter customers based on their aging. Just select from the drop-down menu. This feature is probably the most useful. By filtering out customers who are Past Due by different aging buckets, you can export this information to create a mail-merge file for contacting these customers.

The second step is to select the columns of data that you need to complete your task. Viewers in Accounts Receivable work like all other viewers in the Eagle System. You can filter the data and select the columns to view so that you only display the information you want and need.

When you right click on a column heading, you open a menu that allows you to decide which columns you want to view or to filter certain information for reporting. There are also options for customizing your viewer.

You can also create grids with the information necessary to make a collection phone call list. If creating a call list, the address and certain other fields would not be necessary. You'd probably only need the contact name or customer name, the last payment amount, date of last payment, the balance on the account, and their phone number.

Manipulating Columns

Once you've selected the data that you need for the task at hand, the third step in creating your view is to manipulate the columns so the information is displayed in the order that you want it to appear.

You have the capability to filter, sort, add a column, and include subtotals or totals just by right clicking the header of the desired column. You can also drag columns to rearrange them in the order that you prefer.

Customer viewers allow you to sort customers to view who is allowed to charge, which customers might be in a certain category pricing plan, tax plan, or who has a license of some type attached to their account, like a resale license number, a pesticide license, or a tax exempt number.

Viewers in Customer Maintenance can be used to create Aging reports, lists for labels for sending advertising to customers, letters for collection of past due accounts, or just to send a thank you to customers for their business.

Account codes can be part of the grid, so you can use the results to print lists by demographics, to target sales, or a certain group of customers. Other uses for the customer viewer are to create mailing labels for advertising purposes. These lists can be sorted by zip code order, so when putting them on a mailer they are already presorted. Besides the address and customer name, the customer number can also be part of the label. So, if you're using the mailer with a coupon, you can see how many people from your customer base used the coupon and use the customer number to link them back.

Printing and Saving

The very last steps that you'll likely take after the creation of your viewer will be to print, save or export your view.

If you created a view to help with a task that is part of your regular job, save the view for later. Then you won't have to create the view every time you wish to use it. To do this, just click the File menu in the upper left corner of the screen and select Save View.

You will be prompted to specify how much of your formatting you want to include in the saved view. Typically, you will select the bottom option to save most formatting, then select "OK".

Give the view a name that is meaningful in the "Description" box, so anyone who sees the title will know what it's used for. Then select "Save".

Any time you want to use your custom view, simply open the viewer, go to the "File" menu, select "Load View" and select your customized view.

The viewer will open with your settings and populate with current data.

You can also print your view by selecting the Print icon from the toolbar. It's always a good idea to add a title and date to anything you print. That way, when you find it later, it's easy to determine what task the printed list is being used for and how old it is.

Another option is to export your view to Excel. Just click the little "x" icon in the lower right corner of the viewer.

This automatically exports and opens the viewer in Excel.

You can see from this lesson that there are many different ways that you can manipulate a customer viewer to find flexible information in a grid. It's as easy as selecting a lookup, choosing the columns of data that you want to see, and then sort, filter, and move the columns of data. Once you're done, you can save it, print it, or export it. If you'd like more information on the functionality of viewers, see the TOD course on Eagle Viewers.

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