

LISTS OF PAYORS - PRINT AND EXPORT

Index-> **PLI - Payors/Customers Lists**

Management Windows

ACCOUNTING Management Window (AC)
Chart of Accounts, Financials, Trial Balance, Transactions, Journal Entries

COST CODES Management Window (CC)
Cost Codes, Master Pricing, General Matls and Labor Check Lists

JOBS Management Window (JO)
Jobs and Job Lists

VENDORS and PAYABLES Management Window (AP)
Vendors, Lists, Payables Transactions, 1099's, Waivers, Insurance Audits

CUSTOMERS / PAYORS and RECEIVABLES Mgt Window (AR)
Payors or Customers, Lists, Receivables Transactions, Invoices, Statements

To print lists of Payors/Customers OR to export lists of payors to an Excel spreadsheet, type 'PLI' into the Index field on the Navigation/ Home window.

OR, click on the Customers/Payors and Receivables link under Management Windows, and use the Payor Lists button on the window that opens.

On the 'Payor/Customer Lists - Criteria and Reports' window, use the 'From' and 'To' fields to select the payors or other criteria to display in the list window. Click the 'View All' button to show all payors.

Use toolbar buttons to print various types of Payor Lists reports.

See next page for information about exporting lists to an Excel spreadsheet.

REPORTS-> Sorted Lists ▾ Grouped Lists ▾ Go To Payors / Receivables Management ▾

Payor/Customer Lists - Criteria and Reports

Use the Toolbar at the top of the window to view CHS Payor/Customer List Reports.

View All

| | | | |
|------------|--------------|---------------|-------|
| PAYOR | ALAMOTITLE ▾ | Z ▾ | Reset |
| PAYOR TYPE | CUSTOMER ▾ | SHAREHOLDER ▾ | Reset |
| ACTIVE? | ACTIVE ▾ | INACTIVE ▾ | Reset |

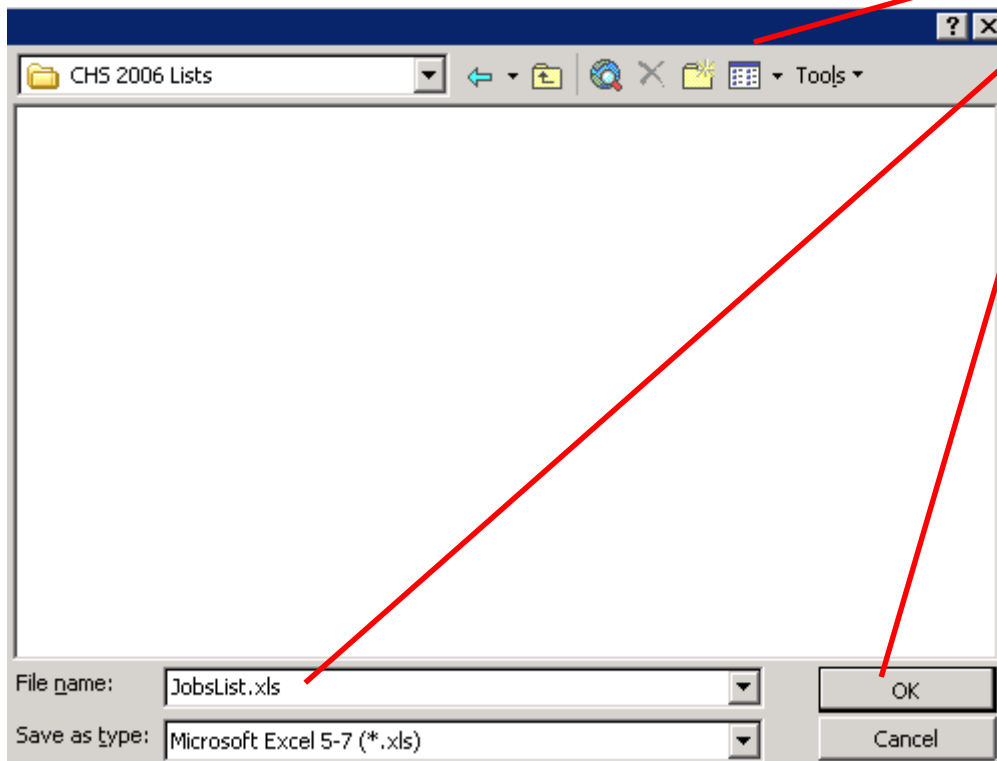
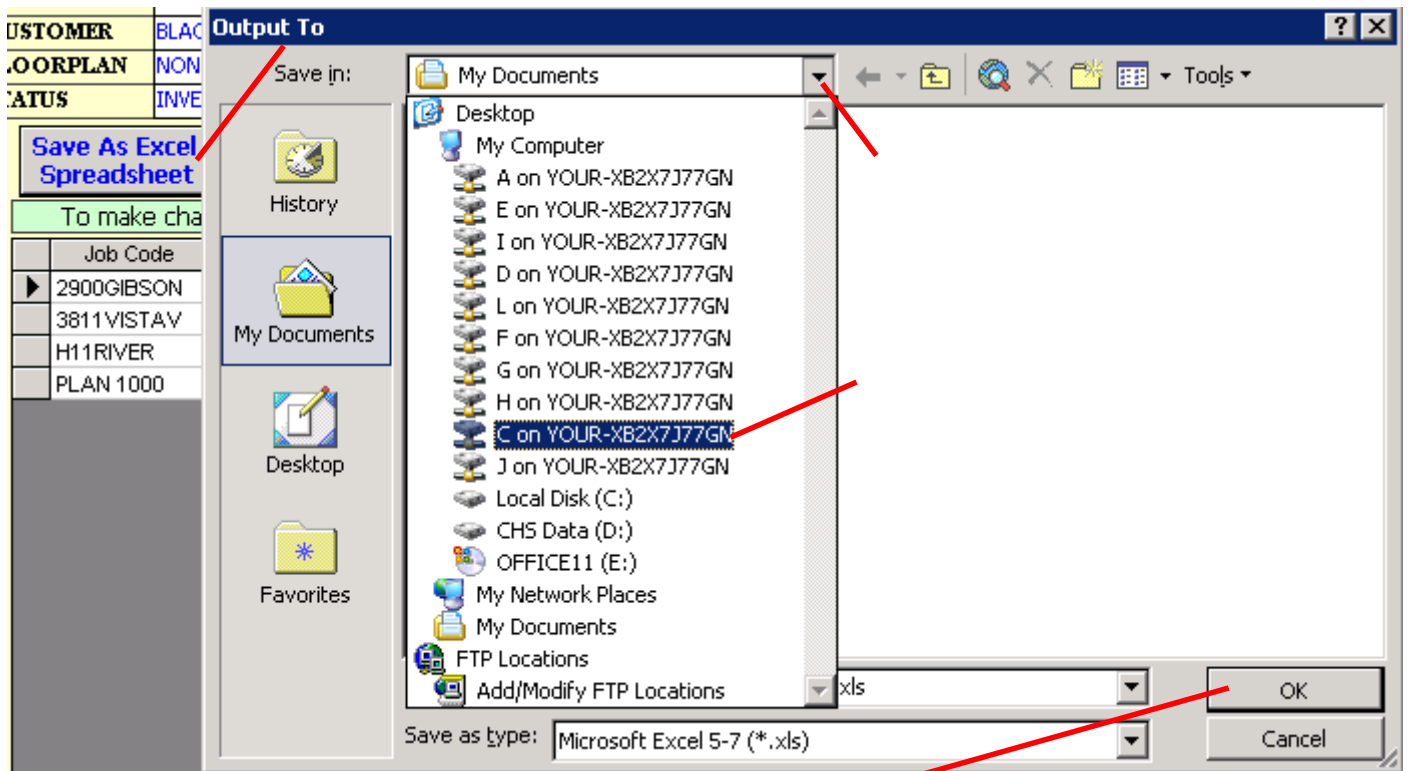
Save As Excel Spreadsheet

To make changes to the Payor's setup record, Double Click on the Edit Field for a Payor in the list below.

| Payor ID | Edit | Status | Payor Name | PAYOR_TYPE | Street | City | State |
|--------------|------|--------|--------------------------|------------|--------------------|----------|---------|
| ▶ ALAMOTITLE | Edit | A | ALAMO TITLE COMPANY | MISC | | Austin | TX |
| BANKOFAM | Edit | A | BANK OF AMERICA | LENDER | P.O. Box 53155 | Phoenix | Arizona |
| BLACKJOHN | Edit | A | JOHN AND SUE BLACK | CUSTOMER | 1000 Somewhere St. | Austin | TX |
| BROWNJAC | Edit | A | JACK AND JILL BROWN | CUSTOMER | 100 BROADWAY | AUSTIN | TX |
| COMPASSBA | Edit | A | COMPASS BANK | LENDER | | | |
| FANTASTI | Edit | A | FANTASTIC BUILDERS, INC. | MISC | | | |
| JONESFRANC | Edit | A | FRANCIS JONES | EMPLOYEE | | AUSTIN | TX |
| KINGTAM | Edit | A | TAMARA KING | EMPLOYEE | | SANTA FE | NM |
| MISC | Edit | A | MISC | MISC | | | |
| SMALLGEOR | Edit | A | GEORGE AND MARY SMALL | CUSTOMER | 1000 SOMEWHERE DR. | AUSTIN | TX |
| SMITHAPRIL | Edit | A | APRIL SMITH | EMPLOYEE | | AUSTIN | TX |
| SMITHJIMBA | Edit | A | JIM AND BARBARA SMITH | CUSTOMER | 1000 Somewhere Dr. | Austin | TX |
| TREVINO | Edit | A | GILBERT TREVINO | OWNER | | | |
| UNKNOWN | Edit | A | UNKNOWN | MISC | | | |

EXPORT LIST DATA TO AN EXCEL SPREADSHEET

You can save the list data by clicking the button labeled 'Save As Excel Spreadsheet'.



Assign an appropriate name to the file.

Then click the OK button. When it is finished, you will receive a message that it has been saved. To open the file, open Microsoft Excel, and open the file from wherever you saved it.

NOTE TO REMOTE USERS:

IF you save a file to 'My Documents' on the Remote Server, you will not be able to open it until it is downloaded to your own computer. Please follow the instructions in the 'Remote User Guide' about downloading files from the server to your own computer.

IF you navigate to your own computer to save the file, then downloading as mentioned above will not be necessary. HOWEVER, it CAN be faster to quickly save to My Documents on the server and then download later. This will avoid waiting for the program to calculate AND download at the same time.