



Customer Center

“Everything about the customer is right in front of you...the info you need is just a click away. COBRA makes me look good. Within seconds, I can answer almost any question from a work crew to an installed part at a specific location. The look of your Center Screens and Reports make it easy to use.”

Scott P. Langels Plumbing & Heating

Cobra for Windows 9.0.297 - [COBRA PHCC CONTRACTING] - [Customer Center]

File Edit Action View Options Goto Reports Utilities Help

New Find Save First Prev Next Last Del Jobs Est Service History Docs Map EMail 5160 5161 5163 Help Exit

Customer

Active Date Entered [06/27/2007]

SName **ABC**

Acct 100538

Name ABC BUILDERS & Son

Add1 345 MORGAN AVE.

Add2

City MINNETONKA

State / Province MN

Zip / Postal Code 55343

Contact

Contact JIM MORGAN & BILL MURPHY

Work Phone 952-555-2222

Home Phone 952-366-9855

Fax 952-988-9633

Cell / Mobile 612-958-8333

E-Mail cindy@cobra-usa.com

General **THIS COMPANY HAS GONE THROUGH A RESTRUCTURE**

Comments **AND ARE CLEARED FOR CREDIT. SEE NOTES.**

AR | General | Notes | Jobs | Invoices | Payments | History | Proposals | Estimates | Codes | Change Orders | Discount | Phones | Locations | Archived Invoices

Customer AR and Aging Info

Account on Hold

YTD Sales \$ **9518.60**

	0-30 Days	31-60 Days	61-90 Days	91-120 Days	120+ Days	Retainage \$	AR Balance
Number of Invoices	2	0	0	0	1		
Total Amount Open	880.22	.00	.00	.00	2150.87	.00	3031.09

Accounts Receivable Aging—Gives you a current look at the Number of outstanding Invoices, Total Amount owed per aging category and total AR balance the customer owes you. Helps you decide whether or not to do additional work for this customer.

Click on the “Invoices” Tab to display each invoice in full detail.

- “One Click” File Tabs—Gives you instant to all critical customer information.
- Color driven “General Comments” point out critical notes about the customer.
- “Account on Hold” prevents you from doing new business with this customer.
- “History” Tab — Keeps track of past job notes/installed parts for this customer including item description, model, serial #, date installed, warranty, price, vendor, worker, etc.
- “Locations” Tab tracks Jobs by “site addresses” while billings go to the customers “billing address”. Organizes all past history and installed parts by job site address.