Receivables Top Clients

It's easy to find your top 10, 20 or so clients.

Go to the Reports menu and choose Export by Year. This creates a text file named "Receivables Export..."

Choose Open File from the File menu, click the Import button and choose that same Receivables Export... file then click Open. This opens the exported data into a temporary Panorama file. Save it and name it. Don't name it a file that replaces any other. Give is a unique name such as <u>Rec's stats 2000</u>.

Double click on the letter C (the column heading of the field C.) A dialog opens where you set *Type* to *Numeric* and *Digits* to *2*. If a dialog opens for Select Problem Data, click on Select Problem Data and cor-rect what the program selected. (It will select at least one record that is the record containing field names. Simply Cut the word "Price" out of the cell.) Double click the Column heading C again until you successfully get it set to *Numeric and 2 digits*.

Click into Field B and do a Cmc/Ctrl-F for Find/Select. The dialog should read... B Contains payment. (type in the word "Payment" on the right side.) Click the Select Button.

Choose Select Reverse from the Search Menu. (Now the payments are unselected.) You'll have a lot of Blank lines at the top of the list - ignore them. (You might want to Save again though.)

Field P is your Contact. Field R is the Company. Click into Field R and do a Group Up from the Sort Menu. You'll have a lot of Blank lines at the top of the list - ignore them still. Scroll down to see your data.

NOTE: you may want to split your datasheet window so you can see field C on one side and Field R on the other.

Click into Field C and choose Total from the Math menu.

From the Sort menu, choose Outline Level then click on the number 1 in the Outline Level dialog.

Click into Field C again, and do a Sort Down from the Sort menu. Your top clients are at the top.

If you miss a step, Revert to Saved and you're back to square 1 with the imported data or at least back to your last Save.