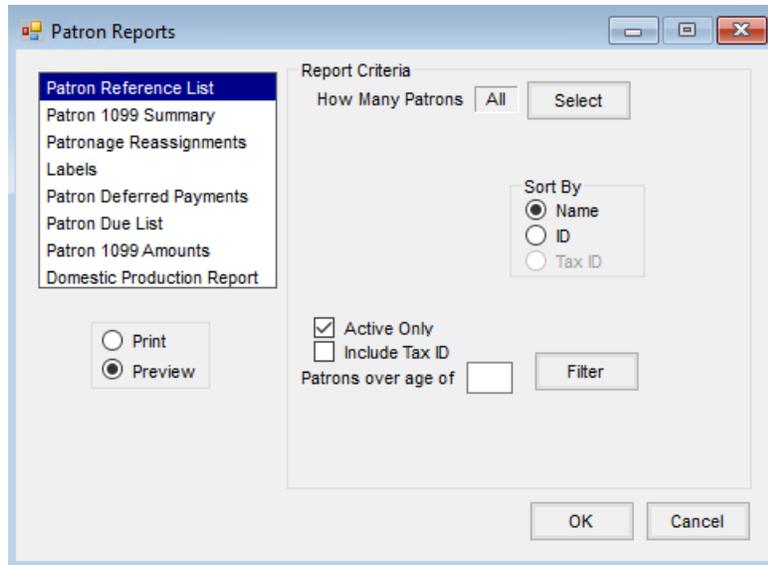# Patron Reports

Last Modified on 02/09/2024 3:56 pm CST

Patron reports are found at *Patronage / Reports / Patrons.*

Patron Reference List

The Patron Reference List gives a quick reference for general Patron information such as *Customer ID, Name, Tax ID, Date of Birth* and *Active* status.

- **How Many Patrons** – Select the Patrons to include in the report.
  Note: *Birth Date* range is available under *Select Patron* filter.
- **Active Only** – If only active Patrons are to appear on the report, mark this option. If all Patrons should be included regardless of their status, do not select this option.
- **Include Tax ID** – Optionally select to print the Patron's *Tax ID*. When selecting this option, the report takes longer to run.
- **Patrons over age of** – Enter an age if only Patrons over a specific age are to appear on the report.
- **Sort By** – Select the preferred sorting option for the report.
- **Filter** – This allows filtering based on information set on the Customer file.

Patron 1099 Summary

The Patron 1099 Summary report lists year to date 1099 totals per Patron.
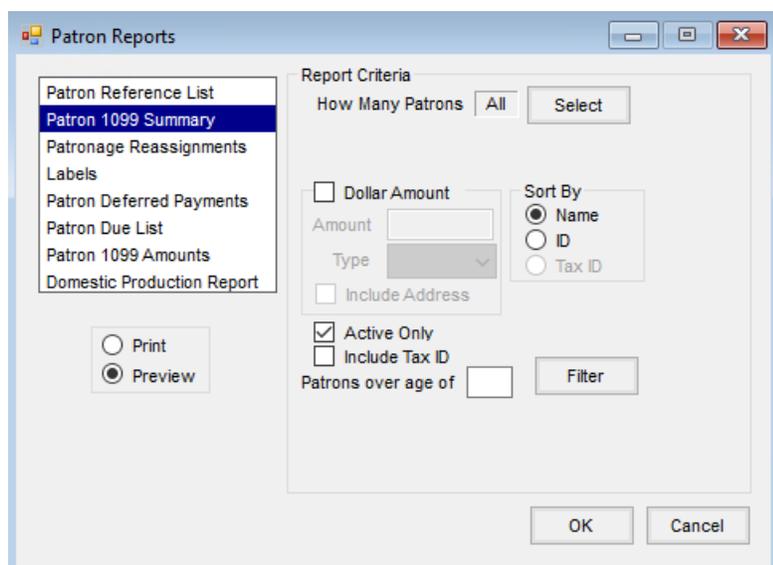
- **How Many Patrons** – Select the Patrons to include in the report.
- **Dollar Amount**
    - **Amount** – Enter a dollar amount for the report to exclude 1099s less than the amount entered.
    - **Type** – Select the type of 1099 to filter the amount.
    - **Include Address** – Select this option to include the Patron's address on the report.
- **Active Only** – With this option selected, only active Patrons appear on the report. This defaults as selected. If all Patrons should be included regardless of their status, do not select this option.
- **Include Tax ID** – Select to print the Patron's *Tax ID*. Selecting this option takes longer for the report to run.
- **Patrons over age of** – Enter an age if only Patrons over a specific age are to appear on the report.
- **Sort By** – Select the preferred sorting option for the report.
- **Filter** – This allows filtering based on information set on the Customer file.
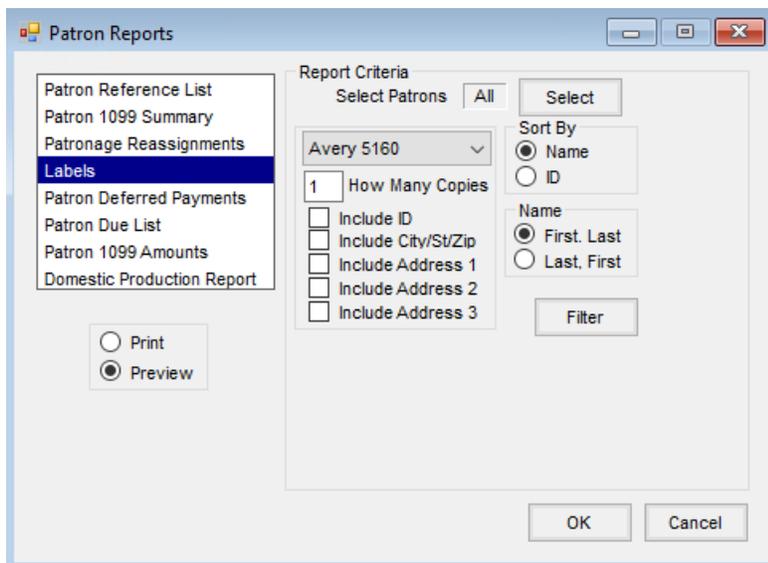
Patronage Reassignments

The Patronage Reassignment report gives a detailed listing of all Patron Reassignments set up.
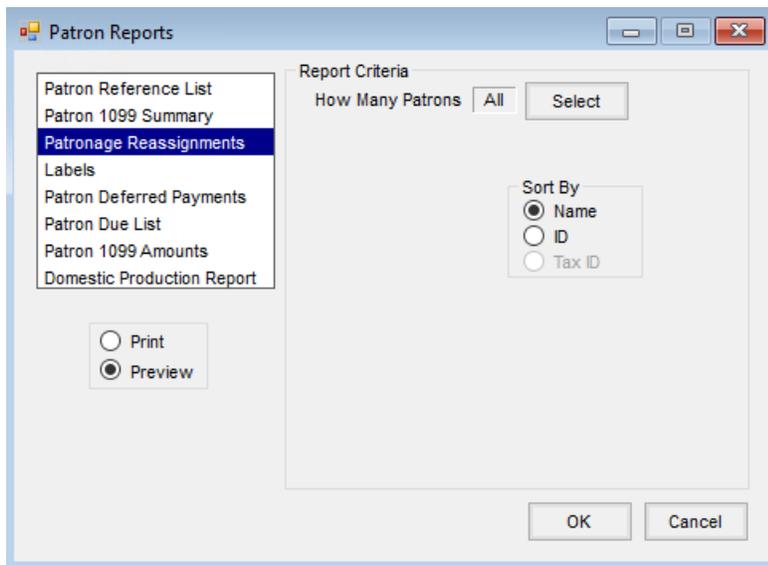
- **How Many Patrons** – Select the Patrons to appear on the report.

- **Sort By** – Select the preferred sorting option for the report.

Labels

The Labels report provides the ability to print Patron labels.

- **Select Patrons** – Select the Patrons to be included.

- **Label** – Select the type of labels to be used from the list.

- **How Many Copies** – Enter the number of copies to print.

- **Include ID** – Select this option if the Customer ID should print on the label.

- **Include City/St/Zip** – Select to print the Customer's city, state and zip on the labels.

- **Include Address 1** – Select to print *Address 1* from the Customer file on the labels.

- **Included Address 2** – Select to print *Address 2* from the Customer file on the labels.

- **Include Address 3** – Select to have *Address 3* from the Customer file on the labels.

- **Sort By** – Select the option to sort the labels either by *Name* or Customer *ID*.

- **Name** – Select the option to determine how the name appears on the labels. Choose to print the names *First, Last* or *Last, First*.

- **Filter** – This allows filtering by information set on the Customer file.

Patron Deferred Payments

The Patron Deferred Payments report provides a listing of all deferred payments.

- **How Many Patrons** – Select the Patrons to be included on the report.

- **Active Only** – With this option selected, only active Patrons appear on the report. If all Patrons should be included regardless of their status, do not select this option.

- **Include Tax ID** – Select if the Patron's *Tax ID* should be included on the report. Selecting this option increases the processing time for the report.

- **Patrons over age of** – Enter an age if only Patrons over a specific age are to appear on the report.

- **Sort By** – Select the option to sort the report.

- **Filter** – This allows filtering by information set on the Customer file.

Patron Due List

The Patron Due List report shows all due information setup per patron.
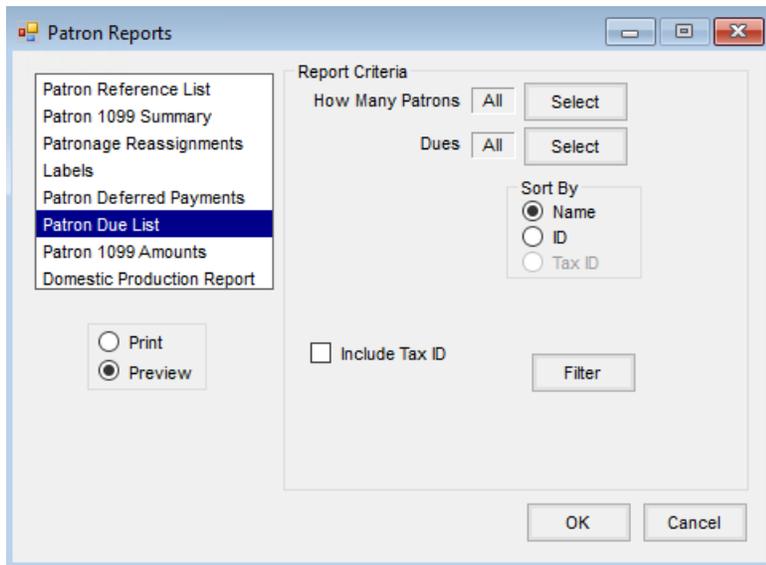
- **How Many Patrons** – Select the Patrons to include in the report.

- **Dues** – Select the *Dues* to appear on the report.

- **Sort by** – Select to sort the report by Customer *Name* or *ID*.

- **Include Tax ID** – Select if the Patron's *Tax ID* should be included on the report. When using this option, the report takes longer to process.

- **Filter** – This allows filtering by information set on the Customer file.

Patron 1099 Amounts

The Patron 1099 Amounts report lists amounts to be reported by 1099 type. This report shows the amounts to be reported along with a count of the 1099s to be printed and submitted.
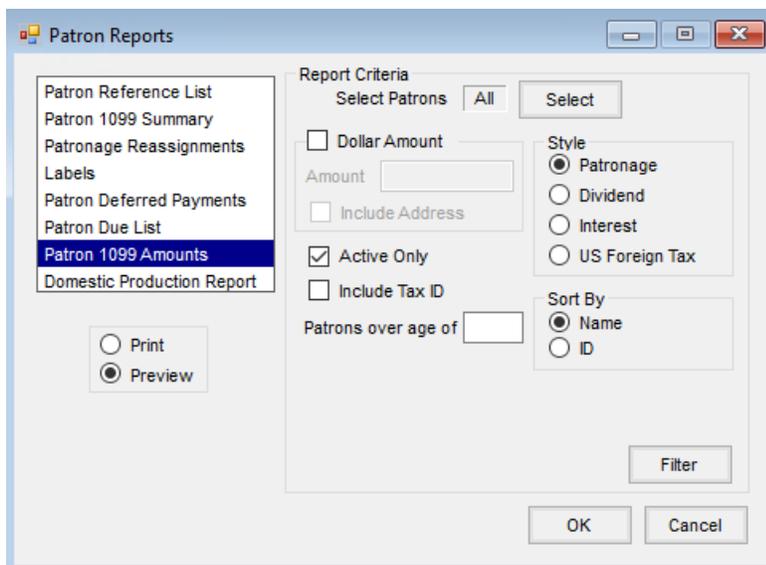
- **Select Patrons** – Select the Patrons to appear on the report.

- **Dollar Amount**
    - **Amount** – Enter a dollar amount for the report to filter out 1099s less than the amount entered.
    - **Include Address** – Select this option to include the Patron's address on the report.
- **Active Only** – Mark if only active Patrons are to appear on the report. This defaults as selected.
- **Include Tax ID** – Optionally select to print the Patron's *Tax ID*. Selecting this option takes longer for the report to run.
- **Patrons over age of** – Enter an age if only Patrons over a specific age are to appear on the report.
- **Style** – Choose the 1099 report style.
- **Sort By** – Select to sort the report by *Name* or *ID*.
- **Filter** – This allows filtering based on information set on the Customer file.

Domestic Production Report

The Domestic Production Report provides the pass-through amount for each eligible Patron based on the captured totals. The pass-through amount on the report is included in the 1099-PATR.

- **Select Patrons** – Select the Patrons to appear on the report.
- **Print Detail** – When this option is not selected, the pass-through amount per Customer and a summary per Class displays. With this option selected, the report prints one page per Customer and lists the *$/Unit* and *Rate/Percent per Category* with a summary at the end.
- **Post Box 6** – Selecting this option posts the calculated pass-through amount to the *Box 6* area on the Customer file to be included in the Customer's 1099.
- **Last Year DB** – Select the prior year database to be included in the report.
- **Use Last Year Patronage Status** – When a prior year database is selected, choose to use the last year patronage status by selecting this option. Alternatively, do not select this option in order to use the current

year patronage status.

- **Active Only** – Selecting this option only prints Patrons with an *Active* status in the selected *Last Year DB.*
- **Sort By** – Select to sort the report by *Name* or *ID*.