

Instructions for Pulling “Revolving Account Audits” & “Customers’ Revolving Account History” by Day

If the “Buyer” is applying for Snap-on Credit financing, then the “Buyer” needs to submit the following to Snap-on Credit at the time of request:

- Seller’s “Revolving Account Audit” for active accounts
- Seller’s “ Customers Revolving Account History”

If the “Buyer” is approved for Snap-on Credit financing & Schedule 2 is complete, in order for Snap-on Credit to fund, the “Buyer” must submit to Snap-on Credit a final updated version of:

- Seller’s “Revolving Account Audit” for active accounts
- Inventory Value Report

REVOLVING ACCOUNT AUDIT INSTRUCTIONS:

- 1) Click on Reports in Chrome POS
- 2) Click on Business Activity
- 3) Top Choice – Account Audit
- 4) Selections (Defaults to RA1 & RA2, Active and All Call Days)
- 5) Export (Saves PDF to Desktop) – Send in an email attachment to Regional Franchise Manager

CUSTOMERS’ REVOLVING ACCOUNT HISTORY:

The screenshot shows the Chrome POS software interface. The main window displays a list of shops on the left and a transaction history table in the center. A 'Customer Statement' dialog box is open, showing options for 'Date Range Start' (1/1/2018) and 'End' (4/20/2018). The 'Account Type' section is checked for 'RA' and 'RA2'. An 'Export Report' dialog box is also open, showing the format as 'Adobe Acrobat (.pdf)' and the destination as 'c:\CustomerStatement.pdf'. Red arrows and callout boxes provide instructions for each step:

- 1) Click on any shop
- 2) Click on Transaction History
- 3) Click on Customer Statements
- 4A) Click on Print all Shops and Customers for
- 4B) Pick day from drop down
- 4C) Click both RA & RA2 Account types
- 4D) Pick date range to reflect the most current 6 months (Start date 6 months prior to end date)
- 5) Export - Save to PDF and pick Destination Folder - attach as an email to Regional Franchise Manager
- 6) *****IMPORTANT***** Repeat steps 1-5 for each day that you have active RA's (i.e. Monday, Tuesday, Wednesday, Thursday, Friday)