Manitou

Running a Customer Master File Report

Use the Customer Master File report to obtain details of the customer records within Manitou. This document details how to run a Customer Master File report.

Locate the Customer Master File report from within the Operator or Supervisor Workstation under System Reports.

Reports Menu>System Reports>Master File Section>Customer Master File

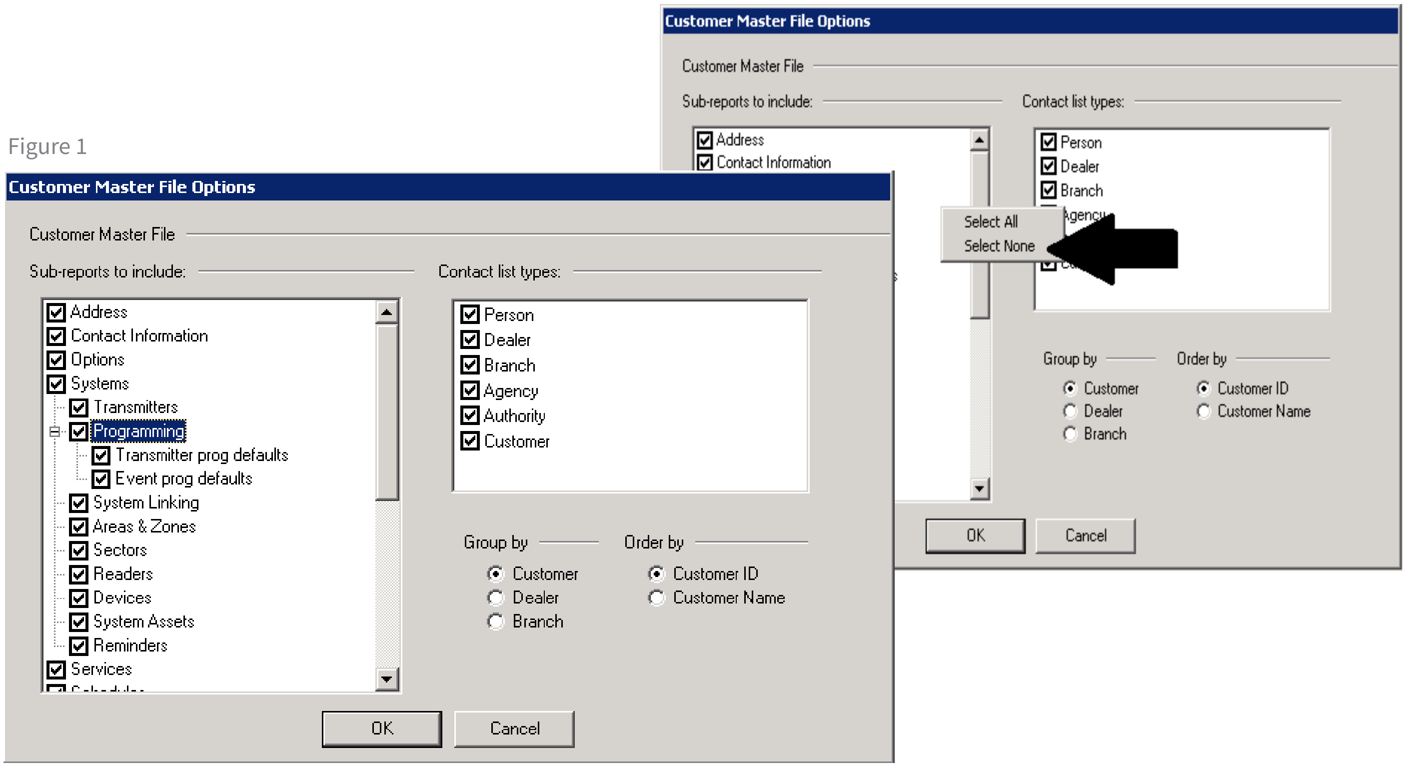
1. Enter the account, or account range, for inclusion on the report.
2. Customize the report to only the necessary parameters by clicking the Options button.
   a. Sub-reports section: To filter all sub-reports, right click within the window and click "Select None." (See Figure 1 on next page)
      - Address – Includes: Address, Account dates, Account type, Relationship, Customer type, Country, Language and Time zone.
      - Contact Info – Includes: Customer record specific contact points. Such as phone numbers and email addresses
      - Options – Includes: Customer specific options such as group and class codes as well as the Area Fill options.
      - Systems – Includes: System specific details such as Event monitoring details. The sub-forms allow for the inclusion of the Transmitters, signal programming (including defaults), linking to other systems, Area and Zone details as well as devices and reminders.
      - Services – Includes: details of which services are tied to a customer record.
      - Schedules – Includes: details of all open/close schedules tied to the customer record.
      - Call Lists – Includes: details of what call lists are available on the customer record and who is on them.
      - Attention – Includes: listing to whom reports and others are delivered.
      - Permits – Includes: a listing of what permits are tied to which accounts.
      - Temporary Comments – Includes the current, future and expired temporary comments housed on a record.
      - Standing Instructions – Standing Comments for the customer record.
      - Special Instructions – Includes any global comments linked to the customer record.
      - Action Patterns – Includes: customer specific action patterns.
      - General Schedules – Includes: general schedules tied to the customer record.
      - User Defined – Includes: details housed on the customer record for items with no other location within Manitou to house them.

Additional notes:

- Contact Points = Phone numbers or email addresses
- F1 on the keyboard while within the Customer Master File report reveals the Help File relating to this report.
- Do NOT run this report on the entire database. There are limitations set on the total size of a report like this and it will either fail or cause system slowdowns.

Running a Customer Master File Report (cont.)

Figure 1



b. Contact List Types section; To filter this section, right-click within the Contact List Types and click “Select None”

- Select the pertinent Contact List Types to include.
- Person – Includes all contact persons and their details from the Customer Contact List.
- Dealer – Includes the details of the Dealer attached to the Customer.
- Branch – Includes the details of the Branch attached to the Customer.
- Agency – Includes the details of any Agency attached to the Customer.
- Authority – Includes the details of each Authority attached to the Customer.
- Customer – Includes the customer records linked to the Customer account.

3. Once all selected parameters are in place, click OK then click Next.
4. Select, or enter, publishing destinations.
5. Click Finish
6. Click OK