

Maintenance Issues Report

The **Maintenance Issues** report returns the Maintenance Issue records based on the parameters selected.

Maintenance Issues

This report lists all maintenance issues listed for customer accounts through the Service Manager.

Title

Maintenance Issues

Priority

6

MAIN

DISTRIBUTION

From

To

Customer ID

Customer Name

Dealer ID

Branch ID

Group

Class

☐ Log Date

08/06/2024

00:00

09/05/2024

23:59

☐ Last Action Date

08/06/2024

00:00

09/05/2024

23:59

☐ Resolved Date

08/06/2024

00:00

09/05/2024

23:59

☐ Appointment Date

08/06/2024

00:00

09/05/2024

23:59

☐ Include maintenance log

Types to include:

Resolution:

User ID:

Select All | Select None

Select All | Select None

Select All | Select None

Company

New

BOLDTECH - Bold Technologies

Customer

Resolved

CARYNMORGAN - CarynMorgan IMMIX

Dealer

Unresolved

CMORGAN - Caryn Morgan (Consultant)

Branch

CSANDERS - Clayton Sanders

On Site:

Priority:

Service Type:

Select All | Select None

Select All | Select None

Select All | Select None

Yes

0

Battery/Power

No

1

General Service

OPTIONS

ADVANCED

PREVIOUS

NEXT

DISPLAY NOW

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Report Parameters

- **Customer ID** - Which customer, or customers, to include in the report. Please note, that the report server searches the database numerically if you are searching for a range.
- **Customer Name** - Which Customer Name, or Names, to locate. This is rarely used alone and will load with the customer name values after selecting the Customer ID.
- **Dealer ID** - Which dealer, or dealers, to include.
- **Branch ID** - Which branch, or branches, to include.
- **Group Code** - Which **Group code**, or codes, applied to accounts, to include.
- **Class Code** - Which **Class code**, or codes, applied to the accounts, to include.
- **Log Date** - Range of dates based on the date the Maintenance Issue was logged.

- **Last Action Date** - Range of dates based on the date the Maintenance Issue had its last action.
- **Resolved Date** - Range of dates based on the date the Maintenance Issue was resolved.
- **Appointment Date** - The range of dates based on the Appointment date on the Maintenance Issue notes.

- **Include Maintenance Log** - Includes the details of the Maintenance Issue and logged comments.
- **Types to Include** - Which records to include in the report results: Company, Customer, Dealer, Branch, etc.
- **Resolution** - Determines which type(s) of Maintenance Issues to include in the results.
- **User ID** - Select the User ID(s) to include in the results.

- **On Site** - Determines which issues to include based on the on-site status of the issue.
- **Priority** - Determines which priority issues to include in the report results.
- **Service Type** - Determines the service types to include in the report results..

Options

- **Monitoring Status** -Filters the report results based on the customer's monitoring Status.
- **Order By** - Determines how the report returns the results either alphabetically by Contact ID or Contact Name

Advanced

The advanced selection allows the filtering by address or Customer User Defined fields.