

Customer Master File

The **Customer Master File** report is the most commonly run Master File report. Operations use this report to provide end customers and dealers the details of their account records.

Customer Master File

This report lists all customer details for a single customer or series of customers.

Progress: MAIN DISTRIBUTION

Title: Customer Master File Priority: 6

From: _____ To: _____

Customer ID: _____ _____

Customer Name: _____

Dealer ID: _____

Branch ID: _____

Group: _____

Class: _____

Commission Date: 09/07/2024 00:00 - 09/07/2024 23:59

Create Date: 09/07/2024 00:00 - 09/07/2024 23:59

Last Update: 09/07/2024 00:00 - 09/07/2024 23:59

Marked for reprint

Reset reprint flag after publishing to printer

Suppress passwords

Suppress AR No.

Mail format

Page breaks

Monitoring Status:
Select All | Select None

Pending

Inactive

Active

Deactivated

OPTIONS ADVANCED PREVIOUS NEXT DISPLAY NOW DOWNLOAD (PDF) DOWNLOAD (RTF) SEND EMAIL

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.
- **Commission Date** - This correlates to the "Path Enabled" date. The date, or range of dates, that pull together the data for the report output.
- **Create Date** - This is the date the account was initially entered into Manitou. The date, or range of dates, that pull

together the data for the report output.

- **Last Update** - This date, or range of dates, search for the accounts saved within that period to pull together the data for the report output.
- **Marked for Reprint** - Returns only accounts that were "marked for reprint" up on saving any edits. Most operations tend to leave this value enabled 100% of the time, therefore, this option will not reduce the number of accounts returned.
- **Reset reprint flag after publishing to the Printer** - This option only functions when the report results are sent to a printer. It will reset the "Marked for Reprint" value to null.
- **Suppress Passwords** - **Recommended** - This removes the passwords from the report results.
- **Suppress AR No.** - Removes the Accounting AR number from the report results.
- **Mail Format** - Produces the report results with the customer, or Mail To, address formatted to show in a window envelope.
- **Page Breaks** - Report results will start a new page at each customer record.
- **Monitoring Status** - Determines which accounts to include in the report based on the customer monitoring status.

Options

The Report options allow the inclusion, or exclusion, of the sub-reports and contact list types, as well as manage the grouping and ordering of the report results.

Options

Sub-Reports to Include:
Select All | Select None

- Address
- Contact Information
- Options
- Systems
- Services
- Schedules
- Entity Contact List Details
- Call Lists
- Attention
- Permits

Contact List Types:
Select All | Select None

- Customer
- Dealer
- Branch
- Agency
- Authority
- Person

Group by:

- Customer
- Dealer
- Branch

Order By:

- Customer ID
- Customer Name

CANCEL DONE

Advanced

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

Advanced		
	From	To
City	<input type="text"/>	<input type="text"/>
State	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> CS Holds Keys	<input type="checkbox"/>	
		<input type="button" value="CANCEL"/> <input type="button" value="DONE"/>