Running a Customer Master File Report

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

Locate the Customer Master File report from within the Manitou Web client under System Reports.

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

1. Enter the account, or account range, for inclusion in the report.
2. Customize the report to only the necessary parameters by clicking the Options button.
    - **Sub-reports section**: To filter all sub-reports, right-click within the window and click "Select None." (See Figure 1)
        - 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.
    - **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:
        - Customer – Includes the customer records linked to the Customer account.

- 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.
3. After selecting all the appropriate parameters, click Done then click Next to enter publishing destinations or click Display Now to review the results on screen.
4. Select or enter the appropriate report email destinations.
5. Click Send Email.

To view or print the report at any time click Display Now. To produce a downloadable copy of the report click Download PDF or RTF.

Additional notes:

- Contact Points = Phone numbers or email addresses
- Shift plus Question Mark (?) on the keyboard reveals shortcuts for that page.

Figure 1