SWS - Forms in the Report Menu - System Reports - Master File Reports - Customer Master File

Last Modified on 08/02/2024 6:05 pm EDT

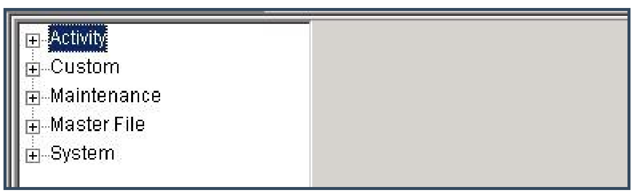
The Customer Master File Report displays details of Customer data contained in the Customer form.

Generating a Customer Master File Report

Perform the following steps to generate a Customer Master File Report:

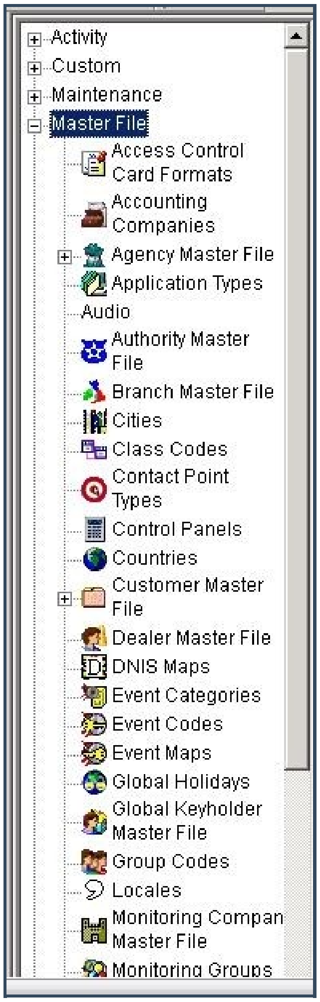
1. Navigate to the Reports menu, and select "System Reports".

   Result: The "System Reports" Navigation Tree displays as shown in the following screenshot:

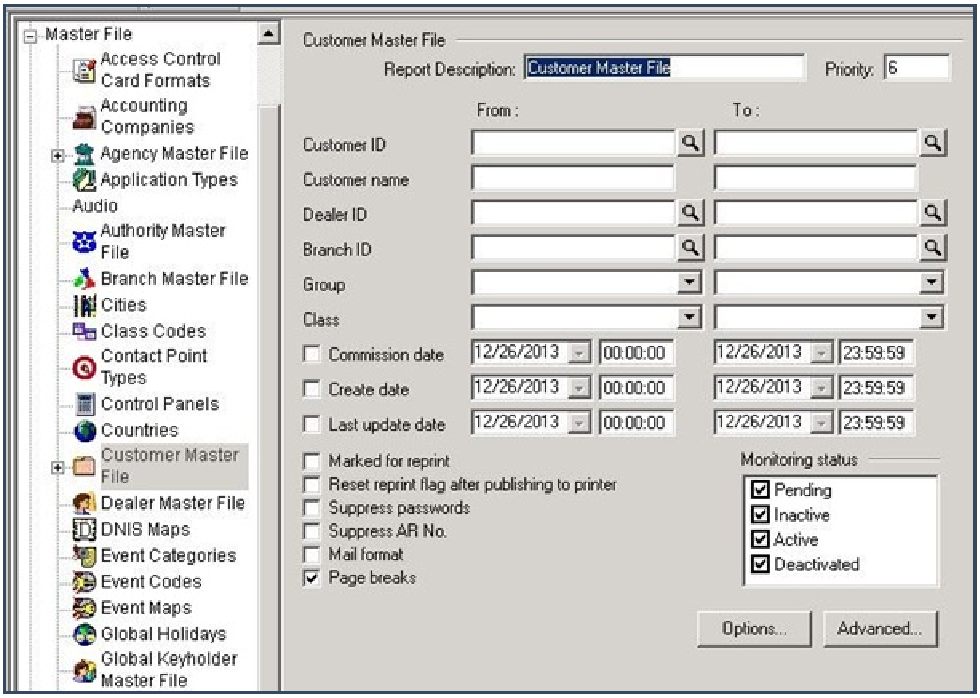
2. Click the "Master File" Navigation Tree Node.

   Result: The Master File section of the Navigation Tree expands as displayed in the following screenshot:



3. Double-click "Customer Master File".

   Result: The "Customer Master File" form displays as shown in the following screenshot:

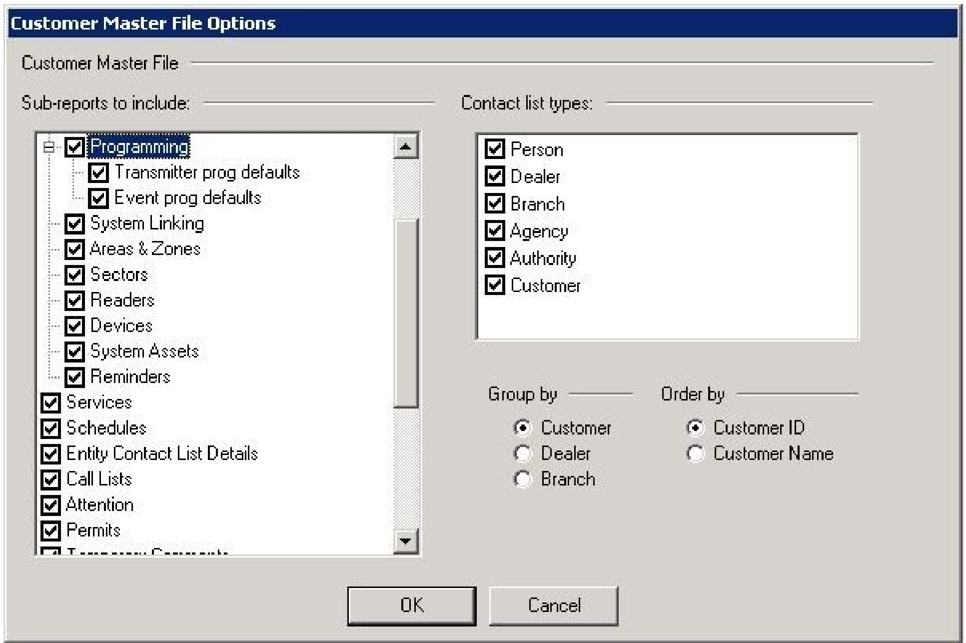


4. If you want, apply any of the following parameters to your Customer Master File Report:

- Customer ID
- Customer Name
- Dealer ID
- Branch ID
- Group
- Class

5. To run a Customer Master File Report, enter a beginning value in the "From:" field and an ending value in the "To:" field. The system will report on all items that fit between the beginning and ending values.
6. If you want to run your Report by the "Commission date", select the item and enter a date and time range.
7. If you want to run your Report by the "Create date", select the item and enter a date and time range.
8. If you want to run your Report by the "Last update date", select the item and enter a date and time range.
9. If you want, select the "Marked for reprint" checkbox.
10. If you want, select the "Reset reprint flag after publishing to printer" checkbox.
11. If you want, select the "Suppress passwords" checkbox.
12. If you want, select the "Suppress AR No." checkbox.
13. If you want, select the "Mail format" checkbox.
14. The "Page breaks" checkbox displays as preselected. If you do not want the system to insert page breaks between Customers in your Report, deselect the item.
15. Items in the "Monitoring status" area of the form display as preselected. If you want to exclude any of the statuses from your Report.
16. Click "Options".

    Result: The "Customer Master File Options" window displays as shown in the following screenshot:

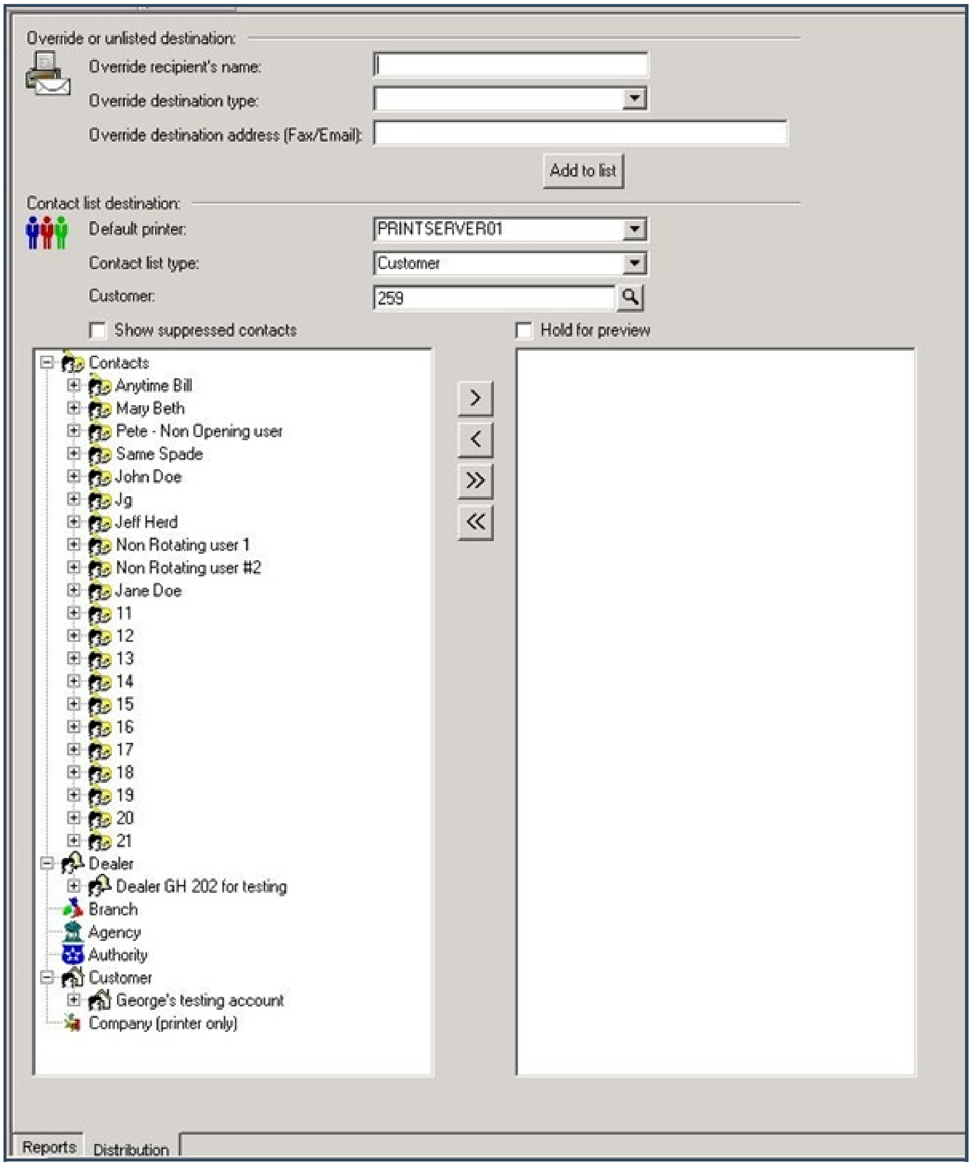


17. Items in the "Sub-reports to include:" area of the window display as preselected. If you want, deselect the items you want to exclude from your Report.
18. Items in the "Contact list types:" area of the window display as preselected. If you want, deselect the items you want to exclude from your Report.
19. The "Customer" option in the "Group by" area of the window displays as preselected. If you want to group items in your Report by "Dealer" or "Branch", select that option instead.
20. The "Customer ID" option in the "Order by" area of the window displays as preselected. If you want to order items in you Report by "Customer Name", select that option instead.
21. Click "OK".

    Result: The "Customer Master File Options" window closes and the system returns the user to the "Customer Master File" form.

22. Click "Next".

    Result: The Distribution Tab displays as shown in the following screenshot:



23. For instructions on distributing your Report, refer to the "System Reports" document.

The Advanced Button

Some Report forms include an Advanced Settings button. Clicking this button results in the display of an Advanced Settings window. Use the "Customer user-defined fields" form in the Tools menu, under Options, and Account Creation/Maintenance to customize Report fields on Advanced Settings windows.

For instructions on how to access and use the form, refer to the "System Reports" document.