

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

Last Modified on 08/02/2024 6:13 pm EDT

The Dealer Master File Report displays Dealer data contained in the Dealer form.

Generating a Dealer Master File Report

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

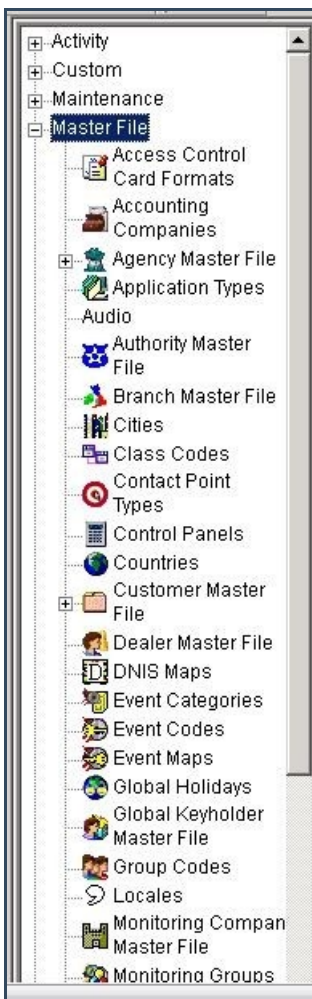
1. Navigate to the Reports menu, and select "System Reports".

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



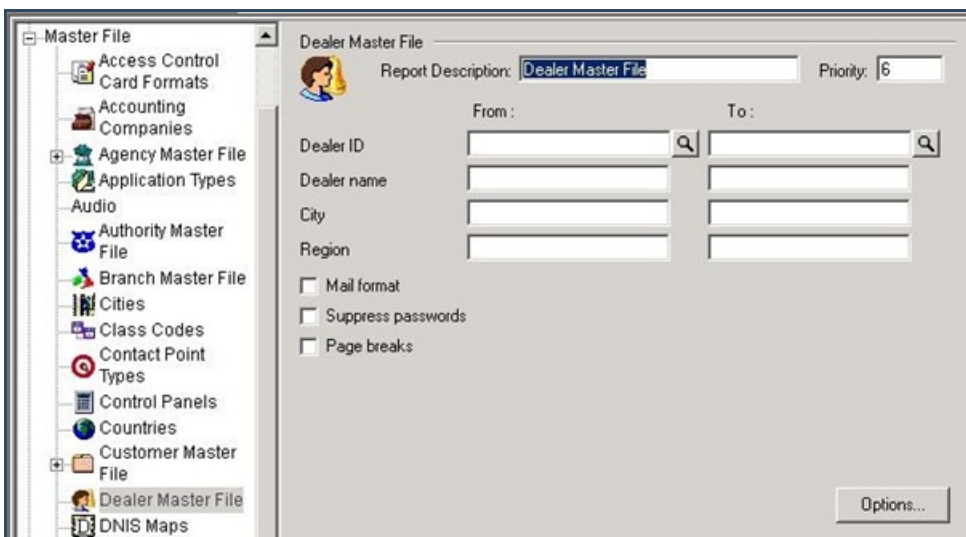
2. Click the "Master File" Navigation Tree Node.

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



3. Double-click "Dealer Master File".

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

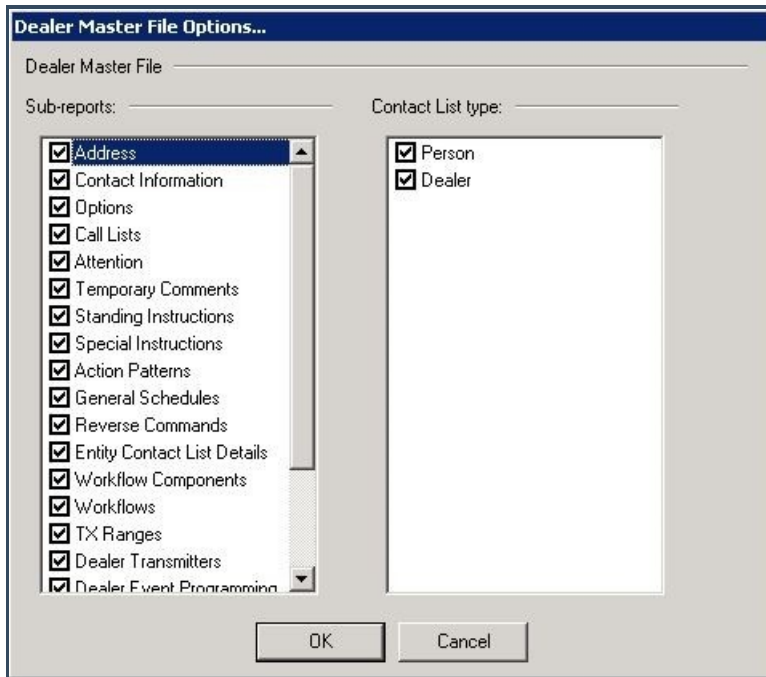


4. If you want, apply any of the following parameters to your Dealer Master File Report:

- Dealer ID

- Dealer Name
 - City
 - Region
5. To run a Dealer 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, select the "Mail format" checkbox.
 7. If you want, select the "Suppress passwords" checkbox.
 8. If you want, select the "Page breaks" checkbox.
 9. Click "Options".

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



10. Items in the "Sub-reports:" area of the window display as preselected. If you want, deselect the items you want to exclude from your Report.
11. Items in the "Contact List type:" area of the window display as preselected. If you want, deselect the items you want to exclude from your Report.
12. Click "OK".

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

13. Click "Next".

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

Override or unlisted destination:

Override recipient's name:

Override destination type:

Override destination address (Fax/Email):

Contact list destination:

Default printer:

Contact list type:

Customer:

Show suppressed contacts Hold for preview

<ul style="list-style-type: none"> [-] Contacts <ul style="list-style-type: none"> [+] Anytime Bill [+] Mary Beth [+] Pete - Non Opening user [+] Same Spade [+] John Doe [+] Jg [+] Jeff Herd [+] Non Rotating user 1 [+] Non Rotating user #2 [+] Jane Doe [+] 11 [+] 12 [+] 13 [+] 14 [+] 15 [+] 16 [+] 17 [+] 18 [+] 19 [+] 20 [+] 21 [-] Dealer <ul style="list-style-type: none"> [+] Dealer GH 202 for testing [-] Branch [-] Agency [-] Authority [-] Customer <ul style="list-style-type: none"> [+] George's testing account [+] Company (printer only) 	<input type="button" value=">"/> <input type="button" value="<"/> <input type="button" value=">>"/> <input type="button" value="<<"/>	
--	--	--

Reports Distribution

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