

SWS - Forms in the Report Menu - System Reports - Master File Reports - Global Keyholder Master File

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The Global Keyholder Master File Report lists Keyholders with Contact IDs tied to their information.

Generating a Global Keyholder Master File Report

Perform the following steps to generate a Global Keyholder 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 "Global Keyholder Master File".

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

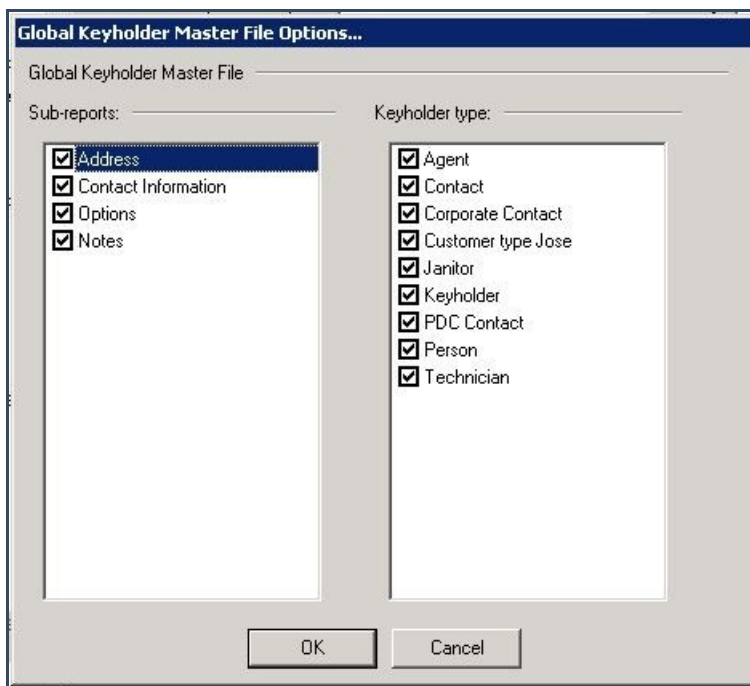


4. If you want, apply any of the following parameters to your Global Keyholder Master File Report:

- Keyholder ID
- Keyholder Name
- City
- Region
- Password

5. To run a Global Keyholder 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 to prevent passwords from displaying in your Report, select the "Suppress passwords" checkbox.
8. If you want your Report to display page breaks between Global Keyholder listings, select the "Page breaks" checkbox.
9. Click "Options".

Result: The "Global Keyholder 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 "Keyholder 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 "Global Keyholder Master File Options" window closes and the system returns the user to the "Global Keyholder 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

Contacts

- 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

- Dealer GH 202 for testing

Branch

Agency

Authority

Customer

- George's testing account
- Company (printer only)

Reports Distribution

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