SWS - Forms in the Report Menu - System Reports - Master File Reports - Temporary Comments

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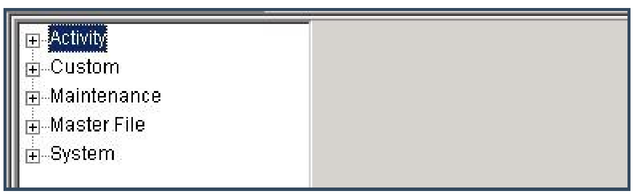
The Temporary Comments Report displays all the Temporary Comments associated with a Customer's record. Users can run the Report to view important comments, such as a Customer vacationing during a specific time period, or other special instructions regarding an account.

Generating a Temporary Comments Report

Perform the following steps to generate a Temporary Comments Report:

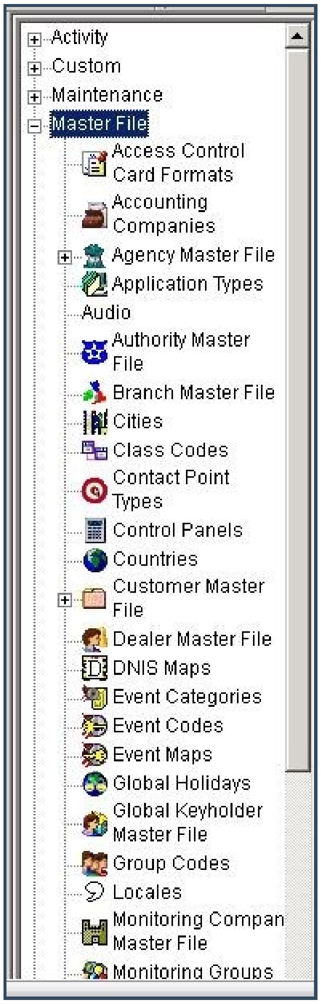
1. Navigate to the Reports menu, and select "System Reports".

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

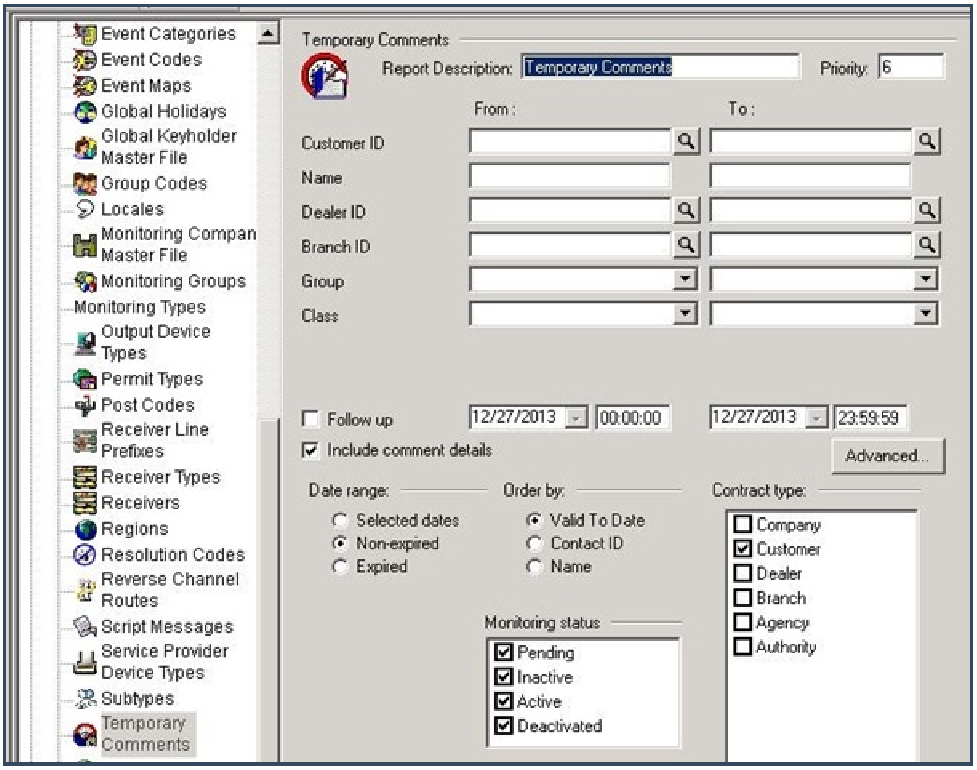
2. Click the "Master File" Navigation Tree Node.

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



3. Double-click "Temporary Comments".

   Result: The "Temporary Comments" form displays as shown in the following screenshot:

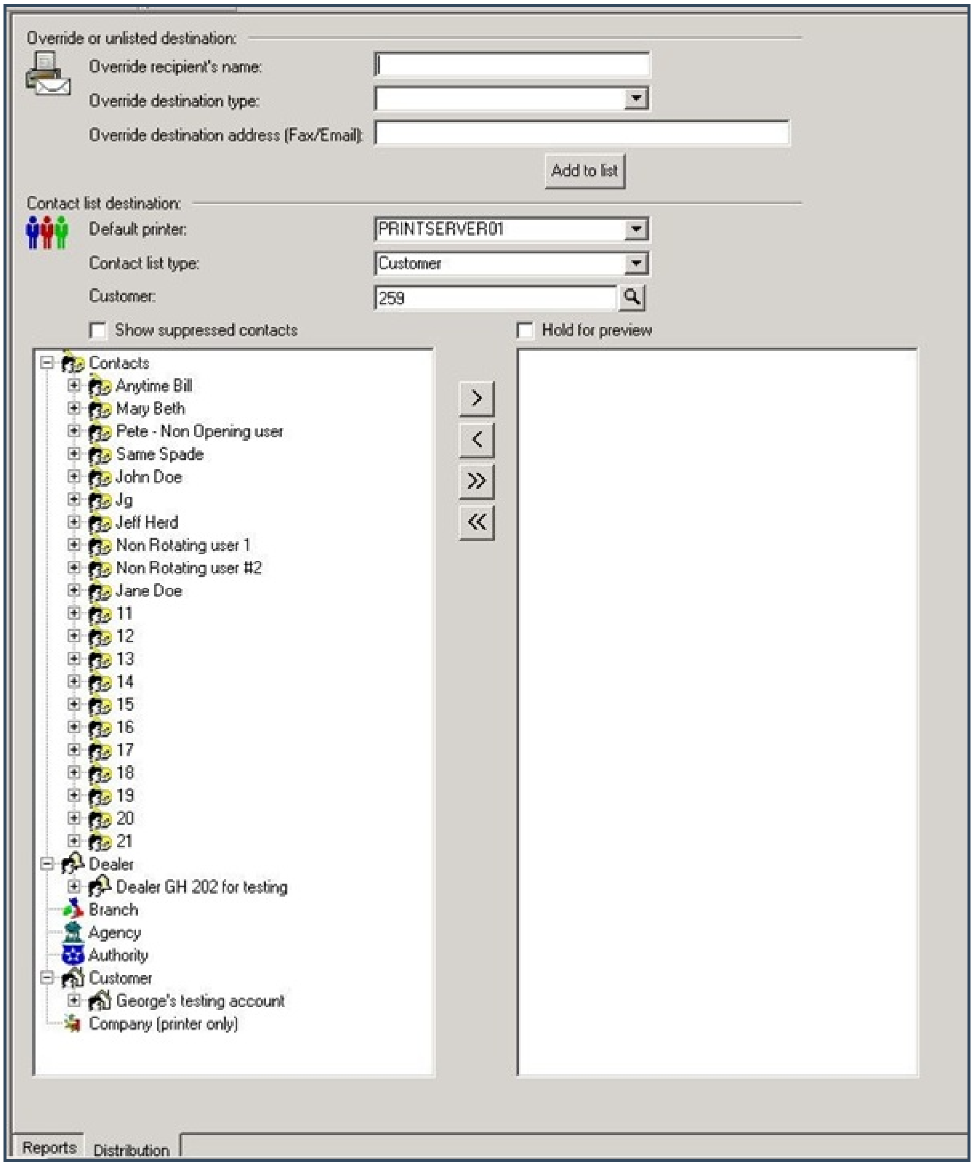


4. If you want, apply any of the following parameters to your Temporary Comments Report:

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

5. To run a Temporary Comments 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 "Follow up" checkbox and enter a date and time range.
7. The "Include comment details" checkbox displays as preselected. Deselect the item, if you want to limit the amount of information that displays in your Report.
8. The "Non-expired" option in the "Date range:" area of the form displays as preselected. If you want, select either the "Selected dates" or "Expired" option instead.
9. The "Valid To Date" option in the "Order by:" area of the form displays as preselected. If you want, select either the "Contact ID" or "Name" option instead.
10. The "Customer" option in the "Contract type:" area of the form displays as preselected. If you want, select the "Company", "Dealer", "Branch", "Agency", or "Authority" option instead.
11. Items in the "Monitoring status" area of the form display as preselected. Deselect any items you want to exclude from your Report.
12. Click "Next".

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



13. 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.