

Alarm Manager Help Sheet

Reports

1. Introduction



When you select a Report, there will usually be some selection criteria required e.g. a range of dates.



Once you enter or select the required details click on the Save button.

Further options will then be made available as follows:



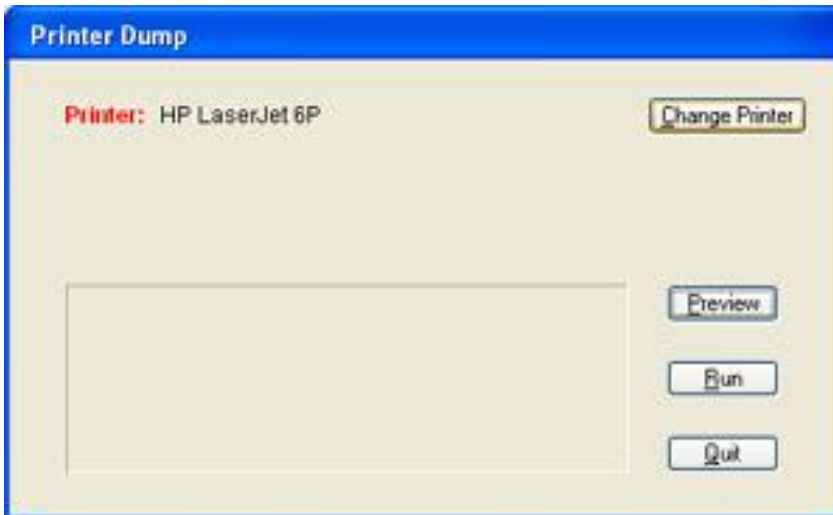
Display

Displays the report on the screen. You may scroll up and down to view the report. Some reports are wider than the screen in which case you can also scroll left and right.

Print

Prints the report to your default printer.

A Printer selection screen will open with the following options:



Change Printer - if you wish to print to a printer other than your default printer.

Preview – view the print layout of the report.

Run – to print the report.

Quit – to close the printer selection box after you have printed the report or to cancel if you decide not to print the report.

Save

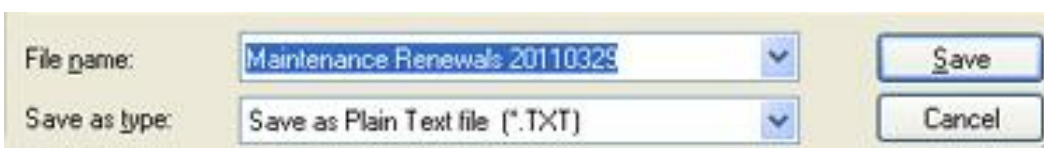
Allows you to Save the report to a file which you can then open in another application, e.g. Word or Excel.

You can save a report to one of the following file types:

TXT Plain Text File

CSV Comma Delimited File – each column separated with a comma

DIF Tab Delimited File – each column separated with a tab



TXT files are designed for opening in Word Processing applications e.g. Word

CSV and DIF files are specifically for opening in Spreadsheet applications e.g. Excel

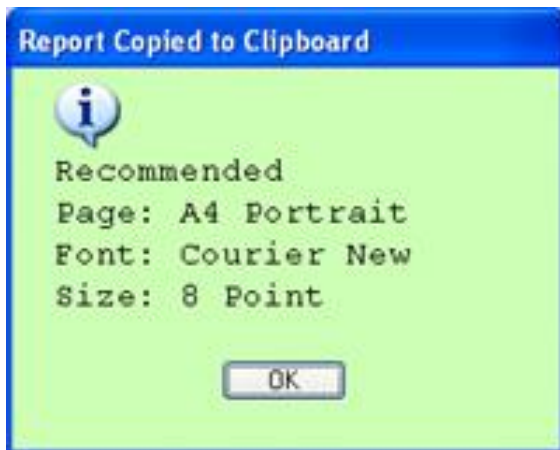
By default all report files are saved to the **C:\MSL\AMReports** folder, unless you choose a different folder.

The system will automatically assign a name to the file e.g. “Maintenance Renewals 20190620.CSV”. The first part of the name will relate to the name of the report, the second part identifies the date on which it was created where YYYY is the year, MM the month and DD the date. This means that you can immediately determine when a particular report file was created and it also means that a particular file will only be replaced if you re-save it on the same day.

Copy

Copies the entire report to the Windows Clipboard. You can then Paste it into any other application e.g. Word, Excel, Email application, etc. Tip: It is easier to transfer the report to Excel by Copying and Pasting it rather than Saving it to a file.

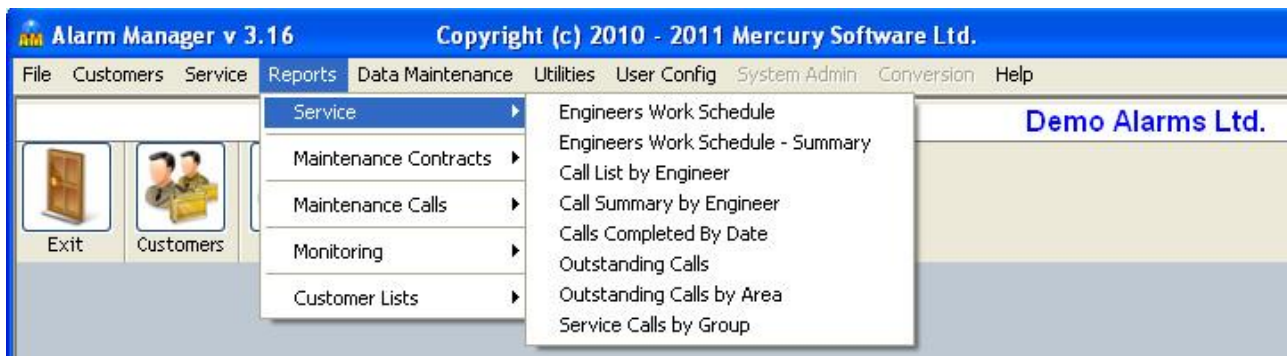
When you select the Copy option, you will be advised of the recommended Font and Point Size. Please take note of this and once you have pasted the report contents into the required application you must select the entire report text and set the Font and Point Size to those recommended in order for columns to be correctly lined up. The Font Used will always be Courier New which has the unique characteristic of being a proportional font on character height while being of fixed width ensuring that all columns are correctly aligned.



Tip – when pasting the report into another application (e.g. Outlook, Word, Excel, etc.) if you do not know where to find the Paste option – you can usually right-click and select Paste from the menu or on the keyboard press Ctrl-V which is the Windows shortcut key for Paste.

Edit – Returns to the selection criteria so that you can edit the criteria for the report, e.g. the range of dates.

2. Service Reports



Engineers Work Schedule

This report will list outstanding Calls logged for an individual Engineer or for all Engineers with Appointment Dates within the specified range of dates.

The dates default from the current date to seven days in the future. You may select different dates as required.

“All Engineers” is selected by default, otherwise you can select any individual Engineer.

Note the check box options as follows:

Include Calls with no Appt. date?

This will include Calls which have no Appointment Date set. The report will then include Calls with Appointment Dates within the specified range of dates plus Calls with no Appointment dates set. By default this option will be enabled.

Sort by Appointment Date?

This will sort the list of calls in order of Appointment Date and Time. If you do not select this option, the default is to sort the report in the order that the calls were entered, i.e. Call No.

Engineers Work Schedule - Summary

This is a summary version of the above report which will simply display the Call No., Name, Address, Phone No. & Notes for each Call. This information is displayed in a condensed format which is ideal for viewing on a mobile phone should you decide to send the report to the engineer by email.

Call List by Engineer

This report will list all Calls logged for an individual Engineer or all Engineers for a specified range of dates. This includes completed and outstanding calls.

“All Engineers” is selected by default, otherwise you can select any individual Engineer.

“All Call Types” is selected by default, otherwise you can select any individual Call Type.

Note the option to ***Sort by Date Logged?*** If this option is not set the default is that the report will be sorted in the order that the calls were entered, i.e. Call No.

Call Summary by Engineer

This report will list the total number of Calls logged for an individual Engineer or all Engineers for a specified range of dates. This includes completed and outstanding calls. It will list the total number of calls logged for each Call Type.

“All Engineers” is selected by default, otherwise you can select any individual Engineer.
“All Call Types” is selected by default, otherwise you can select any individual Call Type.

The total number of calls for each Call Type will be listed.

Calls Completed by Date

This report will list all Calls completed within a specified range of Dates.

Outstanding Calls

This report will list all Outstanding Calls.

Outstanding Calls by Area

This report will list all Outstanding Calls for a particular Area or for all Areas.

Service Calls by Group

This report will list all Calls logged for Customers of a particular Group within a specified range of dates.

3. Maintenance Contract Reports



Maintenance Renewals Report

This report lists Contracts due to expire during a specified range of dates.

The dates will default from the beginning to the end of the current month. You may change these dates to any dates of your choice.

Note re. Option to Exclude Blocked Customers from the Maintenance Renewals Report

In Utilities – Options, there is an option which allows you to decide to Exclude Blocked Customers from the Maintenance Renewals report.

Please refer to a separate Help Sheet which describes how to automatically Renew Maintenance Contracts and how to export Invoices to Mercury Sales Ledger software.

Maintenance Current Contracts

This report will list all Customers/Systems with a current valid Maintenance Contract.

Maintenance Expired Contracts

This report will list Customers whose contracts have expired.

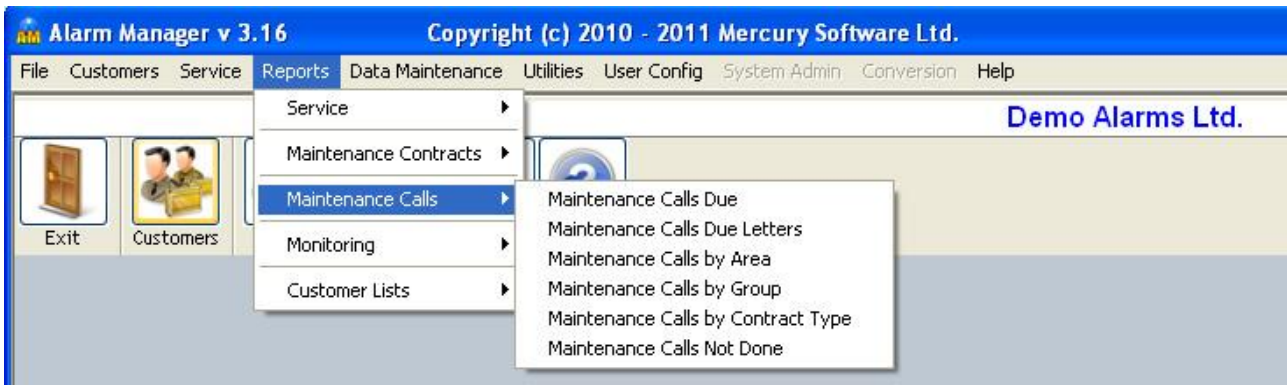
Note re. Option to Exclude Blocked Customers from Maintenance Contract List Reports

In Utilities – Options, there is an option which allows you to decide to Exclude Blocked Customers from the Maintenance Contract List reports, i.e. Current Contracts & Expired Contracts.

Customers without Contracts

This report will list Customers who never had a contract.

4. Maintenance Calls Reports



Maintenance Calls Due

This report will list Maintenance Calls due within a specified range of dates.

The dates will default from the beginning to the end of the current month. You may change these dates to any dates of your choice although you cannot use any dates prior to the beginning of the current month. To list Maintenance Calls that are outstanding for dates prior to the current month, please use the "Maintenance Calls Not Done" report, see below.

Note the check box options as follows:

Include address and phone?

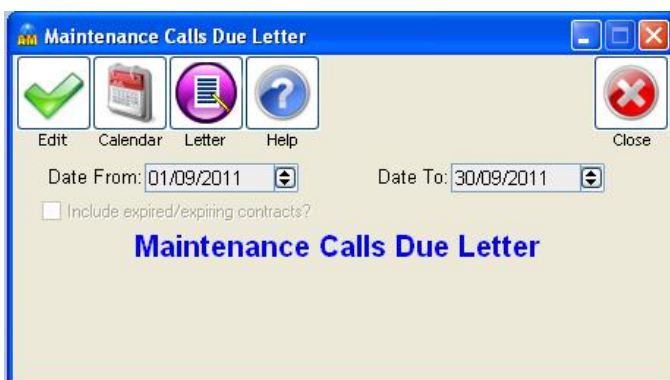
Selecting this option will include the address and phone numbers for each Customer on the report allowing you to pass the report to an engineer with the full details available for each customer.

Include expired/expiring contracts?

By default, customers whose contracts have expired or are due to expire before the date of the next Maintenance Call will be excluded from the report. Selecting this option will include such Customers on the report but details of their expiry dates will be printed.

Maintenance Calls Due Letters

This report will allow you to generate a standard letter for each Customer whose Next Maintenance Call is due within a specified range of dates. The selection criteria are similar to the report described above.



Once you have selected the range of dates, click on the Letter button and select the required Letter. The selected Letter will then be generated for each Customer with a Next Maintenance

Call due within the specified range of dates and all letters will be displayed on the screen. You may then choose to Print the Letters.

Standard Letters are setup in Data Maintenance – Letters.

Please refer to a separate Help Sheet which describes how to use the Letters feature in more detail.

Maintenance Calls by Area

This report will list Maintenance Calls due within a specified range of dates for a particular Area or for all Areas. The selection criteria is the same as the Maintenance Calls Due report described above with the added feature that you can also run this report by Contract Type, you can select an individual Contract Type or all Contract Types. The default selection is all Contract Types.

Maintenance Calls by Group

This report will list Maintenance Calls due within a specified range of dates for a particular Group or for all Groups. The selection criteria is the same as the Maintenance Calls by Area report described above including the option to run the report by Contract Type.

Maintenance Calls by Contract Type

This report will list Maintenance Calls due within a specified range of dates for a particular Contract Type or for all Contract Types. The selection criteria is the same as the Maintenance Calls Due report described above

Maintenance Calls Not Done

This report will list Customers/Systems with a Next Service Date in the past, i.e. Customers whose Next Maintenance Call has not been performed and the date has passed.

Note re. Option to Exclude Blocked Customers from Maintenance Calls Due Reports?

In Utilities – Options, there is an option which allows you to decide to Exclude Blocked Customers from all Maintenance Calls Due reports.

5. Monitoring Reports



Monitoring Commissions Due

This report will list Commission Due from Monitoring Stations within a specified range of dates.

The current month will be selected by default. You may select any month of your choice.

A separate report will be printed for each Monitoring Station, which will list the customers and the commission amounts due during the selected month

Customers by Monitoring Type

This report will list Customers by Monitoring Type. You can select one individual Monitoring Type or all Monitoring Types.

Customers by Monitoring Station

This report will list Customers/Systems by Monitoring Station. You can select one individual Monitoring Station or all Monitoring Stations. If a customer has more than one system monitored with the same Monitoring Station, each individual System will be listed.

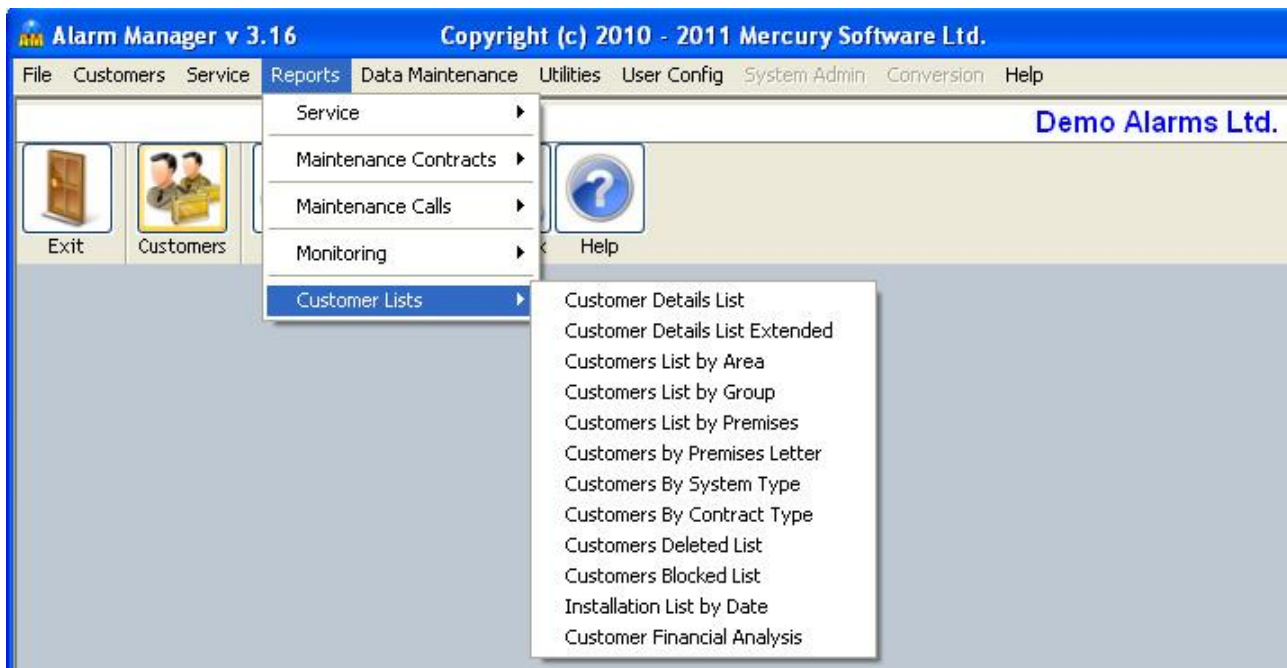
Customers without Monitoring

This report will list Customers/Systems that have a current Maintenance Contract but do not have Monitoring.

Customers without URN No.

This report will list Customers/Systems that have Monitoring details but do not have a URN No. recorded.

6. Customer List Reports



Customer Details List

This report will list all Customers.

Customer Details List Extended

This report will list all Customers in a detailed format containing most data on file for each Customer/System. The objective of this report is to save it to a file for opening in a spreadsheet application (e.g. Excel) for further analysis or sorting. This report is not designed to print as it contains too much data to print and will not fit on any page. For this reason, there is no print option available for this report. You may only view the report, save it to a file or copy it to the clipboard.

Customers List by Area

This report will list all Customers sorted by Area. You can select one individual Area or all Areas.

Customers List by Group

This report will list all Customers sorted by Group. You can select one individual Group or all Groups.

Customers List by Premises

This report will list all Customers sorted by Premises Type. You can select one individual Premises Type or all Premises Types.

Customers by Premises Letter

This report will allow you to generate a standard letter for all Customers for a particular Premises Type. You can select one individual Premises Type or all Premises Types.

Once you have selected a Premises Type, click on the Letter button and select the required Letter. The selected Letter will then be generated for each Customer with the selected Premises Type. You may then choose to Print the Letters.

Standard Letters are setup in Data Maintenance – Letters.

Please refer to a separate Help Sheet which describes how to use the Letters feature in more detail.

Customers by System Type

This report will list all Customers sorted by System Type. You can select one individual System Type or all System Types.

Customers by Contract Type

This report will list all Customers sorted by Contract Type. You can select one individual Contract Type or all Contract Types.

Customers Deleted List

This report will list all Customers who have been Deactivated. Deactivated Customers can be Reactivated, please refer to the Help Sheet on the Customer section for further details.

Customers Blocked List

This report will list all Customers who have been Blocked.

Installation List by Date

This report will list all Customers/Systems with an Installation Date between a specified range of dates.

Customer Financial Analysis

This report will list each Customer showing the annual revenue from each Customer for Maintenance and Monitoring commission/profit. Only Customers with a current Maintenance Contract will be included.