## How to print a CIS (Client Information Sheet) report

- 1. Log into matrix as you normally would.
- 2. From this screen click Reports to open the reports page.

Subscriber Information						$\checkmark$
		Additional Information	Signal Handling Te	st Timer Identifi	ərs	Î
Data Entry	e Link	Accounting				Entr
Live View		Activate			^	Data
History		Start Date				
Reports Disable Account						
Logout		Inactive Date				
		UL Grade	<b>v</b>			
Additional Address		Panel Type	× م			

3. From the selection of reports to choose from, you'll select **CIS Report**. You will have to double click on CIS Report to populate the next window on the following page.

Available Reports	Report History		
	Screen c	Report Title	
Account Listing Report	Account List	ting Report	11/0
AM Notify History Report	¢		
Subscriber List for a Dealer			
One Line Dispatch Report			
All Activity Report			
Unidentified Subscriber Report			
Audit History Report			
CIS Change Verification Report			
CIS Report			
Contact List			

4. Notice all the tabs in the first diagram that we will be discussing through each of the next steps. In the first tab, **CIS Main** (On the second diagram) is where you will enter your account number in the **From Account** and **To Account** fields. If you do not know the account number you can use the search magnify glasses.

CIS Main	Zone Optio	ns	Contact Options	Global Contact Options	Call List Options	Schedule Options	Notes Options
Miscellanou:	s Options 1	Misc	ellanous Options 2				

port Options		
Miscellanous Options 1   Mis	cellanous Options 2	
Print by Selected Sublist?		
Sublist Name:	Lookup	
Print Auto Flagged Only?		
Print by Dealer?		
Print by Sort by Name?		
Print by Account Start Date?		
Print by Identifier:		
From Dealer:	First-	
To Dealer:	-Last-	
Restrict to Sub Dealer:		
From Account	First P ×	
To Account	Last	
From Sort Name:	First	

NOTE: Notice the scroll bar to the right as it may not appear in each diagram. Be aware of this as you may have to scroll through the data to find the field we are referencing.

5. The second tab, **Zone Options** is where you will make sure to *uncheck* **Print Dealer Zones**, **Print Zone Test Span**, **Print System Handle Time and Print Multi-trip Info**. This should leave the first two options selected (**Print Zones** and **Print Zone Notes** ONLY).

Print Zones?	$\checkmark$
Print Zone Notes?	$\checkmark$
Print Dealer Zones?	
Print Zone Test Span?	
Print Zone Msgs	

6. The third tab, Contact Options is where you will uncheck Print Passcodes, unless it's someone who is authorized to have a CIS report with codes. You will also uncheck Print Contact's Email Address and Print Misc. Contact Info. This will leave Print Contacts and Print Contacts w/ Blank Phone Numbers as the ONLY options selected.

Print Contacts?	<b>V</b>
Print Passcodes?	
Print Contacts w/ Blank Phone Numbers?	
Print Contact's Valid Window?	
Print If Not Modified from Default?	

7. The **Global Contact Options** tab, all options should be unchecked in this tab. If you *uncheck* **Print Global Contacts** it will remove the checkmarks from the other fields.

Print Global Contacts?	
Print Global Passcodes?	
Print Global Contacts with Blank Phone Number?	
Print Global Contact's Valid Window?	
Print Global Contact's E- mail Address?	
Add E mails	
Add E-mails	
Submit	

8. The fifth tab, **Call List Options**. Here you will have to *uncheck* all options. By unselecting **Print Call List**, this will unselect all options.

Print Call List?	
Print Unused Call List?	
Print Call List's Valid Window?	
Print Separator Between Call Lists?	
Print Blank Phone Numbers in Call Lists?	
Print Dealer Call Lists?	
Print Global/Group Call Lists?	
Print Global Contacts on Call Lists?	
Print Premise's Contact Name?	
Print Call lists Overrides?	

9. The sixth tab

is Schedule Options, this can be

left as is.

Print Schedules?	$\checkmark$
Print Holiday Schedules?	1
Add E-mails	
Submit	

10. The seventh tab is **Notes Options**, you will have to *uncheck* **Print Site Directions**, this will leave **Print Notes**, **Print Subscriber Notes** and **Print Temporary Notes** as the only selcted options.

Print Notes?	1
Print Subscriber Notes?	1
Print Temporary Notes?	1
Print Site Directions?	1
Print Group Notes?	
Print Dealer Day Notes?	
Print Dealer Night Notes?	
Print Dealer General Notes?	

11. From here you can press the submit button as the other 2 tabs (Miscellaneous Options 1 & 2) can be left as is.

12. When you hit submit you will get a **Report Started** box, you can close this window by slecting the **X** in the top right hand corner of the dialog box..



13. You will now double click on the CIS report that you created, it will have the current date and time.

Report History		
Report Title	Run Date	Finish Date
CIS Report	11/06/2012 19:05:17	11/06/2012 19:12:07
Account Listing Report	11/06/2012 18:15:33	11/06/2012 18:15:33
φ	💷 🖘 Prev - Next 🕨 🕫 🔽	Showing 1 - 2

14. Once the report is open, you will click the **Print** button in the bottom left hand corner.

Content		
11/07/12 12:49	Subscriber Information Report	Page: 1
	Account Number: 77777777	
Premises	Mailing Address-	
TEST ACCOUNT		
SUDBUDY ON DON OF CAL	4	
Phone		
Sort By Name	: TEST ACCOUNT	
Panel Type		
Start Date	: 11/01/12	
Active (Y/N)	: Ү	
Time Zone	: EST	
Any Signal a Test	· · · · · NONE	
Zone Test.	: N	
Commercial/Residential.	: R	
Supervise Schedule	: N	
Dealer Name	: ANY DEALER	
Dealer No	: ANYD	
Contract Name Have	alts Passcodes and Emergency Conta	icts De Dhone Number
Contact Name Ose	er Passoode Duress Coo	
SUDBURY FIRE DEPT.		(705) 675-3341
SUDBURY POLICE DEPT.		(705) 674-7511
SUDBURY AMBULANCE		(705) 673-1117
		(705) 123-1234
JOHN SMITH		(705) 669-4458
JANE DOE	Signal Descriptions	(705) 889-7754
Signal Code Event Type	Event Description	Call List. Reg
001 BURGLARY	FRONT DOOR	DEFLT OPR
002 BURGLARY	BACK DOOR	DEFLT OPR
003 BURGLARY	PATIO DOOR	DEFLT OPR
Print		

15. The printer window will then populate. You can just click **Print** and it will send the CIS report to the printer you have selected or your default printer. Once printed you can click on the **X** in the top right hand corner of the Report Result box from previous step to close.

about: <b>blank</b>	¢		23
Print Total: 2 shee	ets of paper       Print     Cancel		
Destination	\\sud-fs01\PTR-LSR-BA  Change		
Pages	• All		
Copies	1 + -	E EPTh.e.II TE EPTh.e.II	
Layout	Portrait	200 000 000	
	🔵 Landscape 🔍		