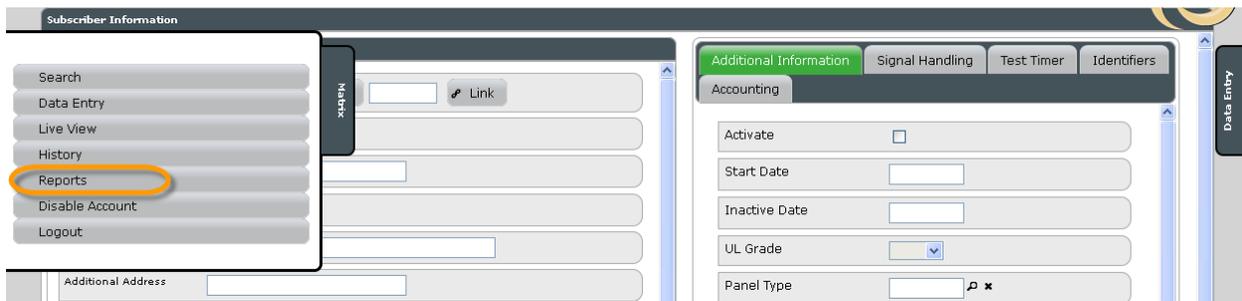


How to print a CIS (Client Information Sheet) report

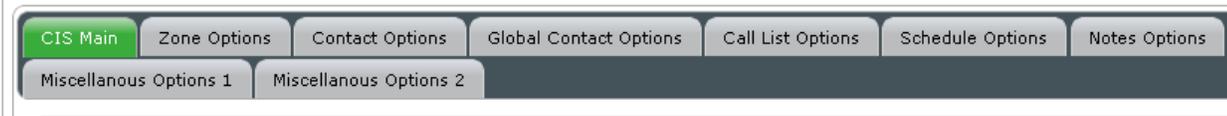
1. Log into matrix as you normally would.
2. From this screen click Reports to open the reports page.



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
Account Listing Report	Account Listing Report 11/0
AM Notify History Report	Account Listing 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.



Report Options

Miscellaneous Options 1 | Miscellaneous Options 2

Print by Selected Sublist?

Sublist Name:

Print Auto Flagged Only?

Print by Dealer?

Print by Sort by Name?

Print by Account Start Date?

Print by Identifier:

From Dealer:

To Dealer:

Restrict to Sub Dealer:

From Account

To Account

From Sort Name:

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?	<input checked="" type="checkbox"/>
Print Zone Notes?	<input checked="" type="checkbox"/>
Print Dealer Zones?	<input type="checkbox"/>
Print Zone Test Span?	<input type="checkbox"/>
Print Zone Msgs	<input type="checkbox"/>

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?	<input checked="" type="checkbox"/>
Print Passcodes?	<input type="checkbox"/>
Print Contacts w/ Blank Phone Numbers?	<input checked="" type="checkbox"/>
Print Contact's Valid Window?	<input type="checkbox"/>
Print If Not Modified from Default?	<input type="checkbox"/>

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.

The screenshot shows a form with the following elements:

- 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?**

Below the checkboxes are two buttons: **Add E-mails** and **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.

The screenshot shows a form with the following elements:

- 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?**
- Print RP Overrides?**

9. The sixth tab is **Schedule Options**, this can be

left as is.

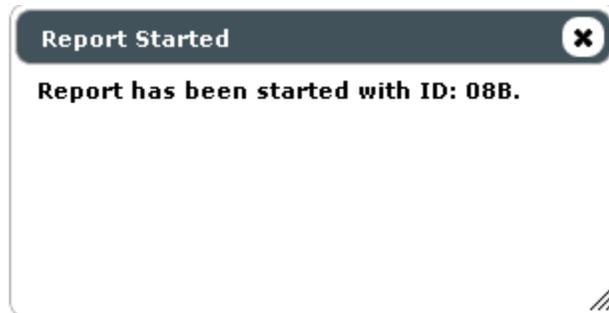
Print Schedules? <input checked="" type="checkbox"/>
Print Holiday Schedules? <input checked="" type="checkbox"/>
Add E-mails
Submit

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 selected options.

Print Notes? <input checked="" type="checkbox"/>
Print Subscriber Notes? <input checked="" type="checkbox"/>
Print Temporary Notes? <input checked="" type="checkbox"/>
Print Site Directions? <input checked="" type="checkbox"/>
Print Group Notes? <input type="checkbox"/>
Print Dealer Day Notes? <input type="checkbox"/>
Print Dealer Night Notes? <input type="checkbox"/>
Print Dealer General Notes? <input type="checkbox"/>

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 selecting 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 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

Showing 1 - 2

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.

