

Adding Year in Customer Activity

02/01/2024 5:20 pm EST

Initial Setup

1. Identify the Type of Report Customer wants to change for Account History do the H-S-A and H-S-A SQL Reports.
2. Open Form Writer then proceed to File Open the H-S-A.
3. Put marker in field you want to change and delete existing and change to long date Received by clicking and dragging.
4. Save report as a separate report.
5. Each time a form is changed need to close out of Form Writer and reopen.

Application

1. Log into SIMS III and Select Configure/Select Report Forms
2. Select Account History Detail and find the Newly created report in the running list and double click it and hit okay.



3. Test by reviewing an account's history and verify the Year is now present.