

Client Data System

Volume 137: Time Log Based Fee Report

This Fast Class demonstrates one way of creating a dynamic report that will calculate fees for time spent working with a client based on an hourly rate. The hourly rate and time data is captured in the **Time Log Information** window when making a Time Log entry in a contact record SmartPad.

Time Log Information 🛛 🛛 🔀							
[_					
From	12:17 PM	То	01:32 PM				
Duration	75	Date	06/02/2008				
Hourly Rate	60.00	Total Amount		75.00			
Contact	Ackerman, Joseph	User	DEMO				
Keywords							
Remarks							
Reviewed Joe's portfolio. Joe will make some contributions to his college fund. He'll talk to Kathleen to confirm her contributions as well. Scheduled a phone call for next week.							
OK Cancel Help							

Figure 1: The Time Log Information window.

To create the Time Log Based Fee Report :

- From the main screen in CDS, select **Reports** in the **Main Menu**.
- Select Dynamic Reports.
- Leave the search fields blank in the **Find Report Selection** window and click **OK**.
- In the Report Selection summary screen, click the Add button.
- Select the **Contact Information** table in the **Select Primary Table** window of the **Report Definition Wizard** and click **Next**.

• Select the **First Name** and **Last Name** columns in the **Report Column Definition** window.

• Select the **Time Log Information** table in the **Table** drop-down field under the **Columns Available** section.

- Select the **Date**, **Remarks**, **Duration**, **Hourly Rate**, and **Total Amount** columns in the **Report Column Definition** window.
- Adjust the width of selected columns as needed.

Note: Due to the fact that the Time Log Based Fee Report is built on two tables, column width cannot be adjusted in report results.

Report Column Definition - Step 1 of 5							
Last Name First Name		Date		Remarks			
Columns Available Serial No Contact User From To Keywords	2 2	Columns Selected Last Name First Name Date Remarks Duration Hourly Rate Total Amount	otal	2	Sort By (A) Date Direction One Ascending Descending Ignore Year		
		Back Nex	Ð		Cancel Help		

Figure 2: Report Column Definition window (criteria added).

• Select the **Duration** column in the **Columns Selected** section and select the **Total** option.

• Select the **Total Amount** column in the **Columns Selected** section and select the **Total** option.

• Select the Date column in the **Columns Selected** section and click the arrow button pointing to the **Sort By** section.

• Click Next.

• In the **Report Selection Criteria** window (step 2), click the small button to the right of the first **Filter** drop-down field.

• In the **Filter** summary screen, click the **Add** button.

• Select the **Time Log Information** table in the **Table Names** window and click **OK**.

• In the Filter Time Log Information window, select the following criteria -

- Column Name = Contact
- Operation = **Cur. Record**

Note: When the **Current Record** operation is selected, the **Value** field disappears as the value is determined by the current selected record.

• Click the Add button to add selected criteria to the filter.

🔊 Filter on Time Log Information - CURRENT CONTACT 🛛 🛛 🔀					
Column Name Value	Operation				
Contact 🖌	💽 Equal				
	🔘 Not equal				
==== Contact ==== = Current Record	O Greater than				
	◯Less than				
	O Cur.Record				
	-Link Operation				
Filters Market					
OK Cancel Run Link Help					

Figure 3: The Filter on Time Log Information window (criteria added).

- Click OK.
- Enter Current Contact as the name of the new filter.
- The new filter will appear in the Filter Summary screen.
- With the **Current Contact** filter selected, click the **OK** button (green checkmark) in the **Filter** summary toolbar.

• The **Current Contact** filter will be added to the **Report Selection Criteria** screen in the first **Filter** drop-down field.

- Click Next.
- Click **Next** to accept the default selections in step 3.

• Click Next to accept the default selections in step 4.

• Enter **Time Log Fee Report for Selected Contact** as the name of the dynamic report in step 5.

• Click Finish to create the Time Log Fee Report for Selected Contact dynamic report.

To run the Time Log Fee Report for Selected Contact dynamic report:

- Open a contact record.
- Select **Reports** in the main menu.
- Select Dynamic Reports.

• Tag the **Time Log Fee Report for Selected Contact** dynamic report and click the **Run** button.