Fast·Class File

Client Data System

Volume 66: Integration with Profiles+ Professional

Before exporting data out of CDS into Profiles+™ Professional, you will need to:

- Configure Profiles+™ Professional
- Configure CDS
- Ensure that Investment data is entered correctly in CDS.

Configuring Profiles+™ Professional for Integration with CDS

- Open **Windows Explorer** and locate the directory or folder where Profiles+ Professional is installed (typically C:\FPW).
- Open the **FPW** directory or folder and double-click on the **CDSNotificationServer.exe** file.
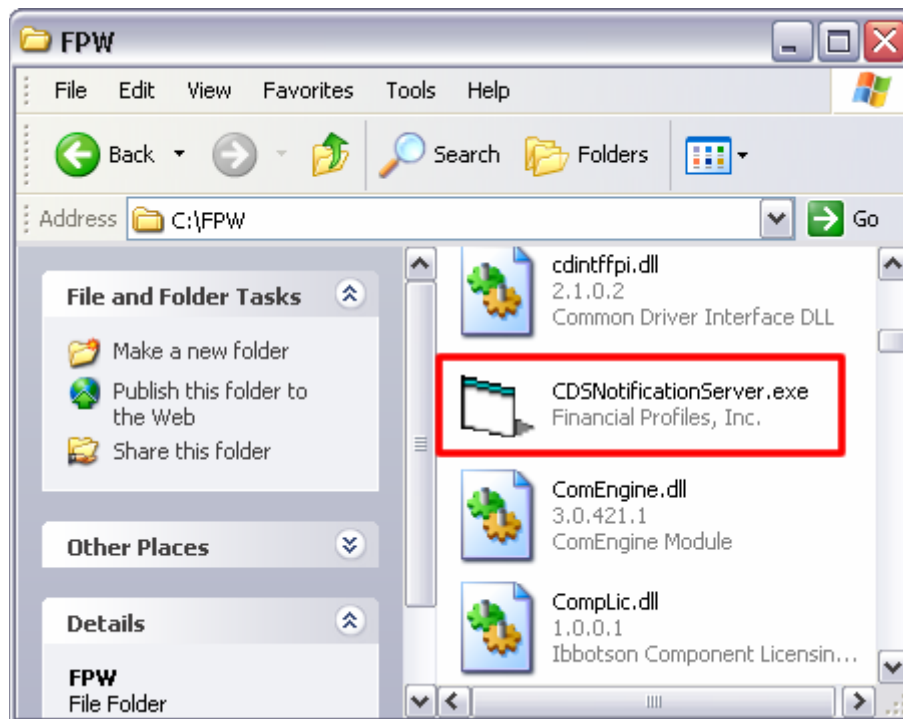

Figure 1: The CDSNotificationServer.exe file in the FPW directory.

Note: Although there will be no visible activity, Profiles+ Professional will be notified that you will be using CDS.

- Open Profiles+ Professional.
- Click **Tools** then select **Options** in the **Tools** menu. (Older versions of Profiles+ may have **Options** in the **Utilities** menu.)
- In the Options window, select the **Data Integration** tab.
- Select the **Enable CDS Integration** option.
- Close Profiles+ Professional.

Configuring CDS for Integration with Profiles+™ Professional

- From the main screen in CDS, select **Database** in the menu bar then select **Utilities**.
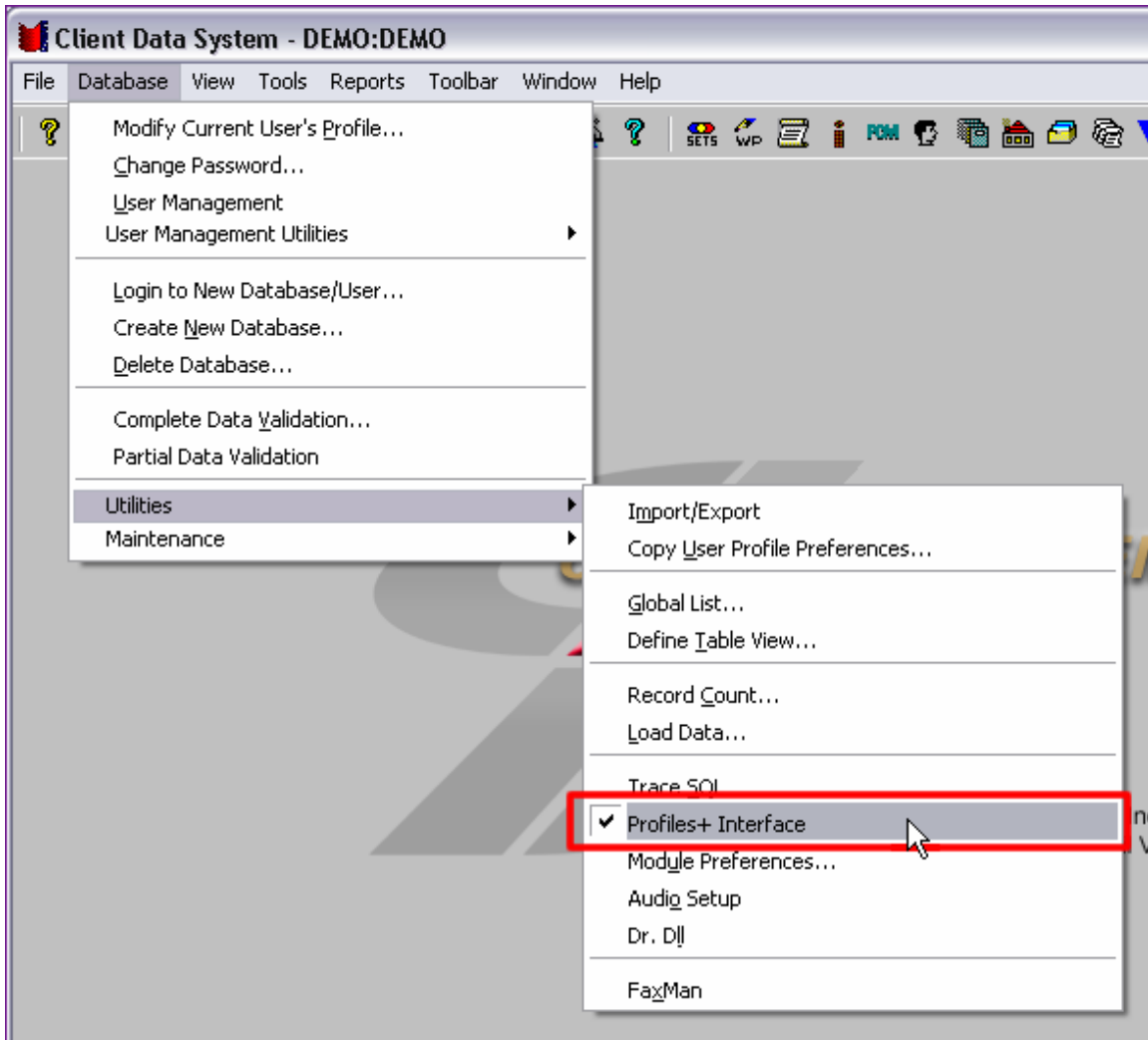- In the **Utilities** menu, select **Profiles+ Interface**.

Figure 2: The Profiles+ Interface option in the Utilities menu.

- You will be prompted to close CDS. The next time CDS is opened, the Profiles+ Integration will be enabled.

Investment Data Entry in CDS

In Profiles+, assets are identified by type. The **Asset Type** field in Profiles+ has predefined options that must be used to identify each Asset.
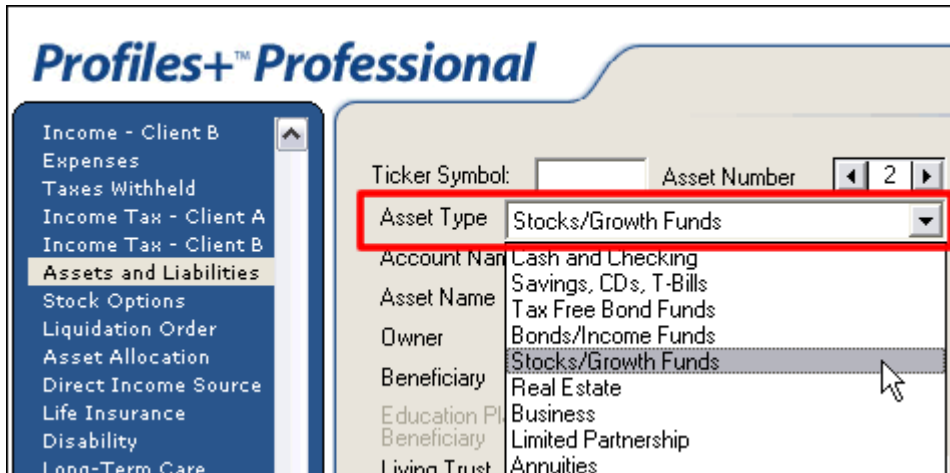

Figure 3: The Asset Type field in Profiles+.

The **Export** field on the right hand side of the **Investment Detail** tab in CDS has been mapped to the **Asset Type** field in Profiles+.
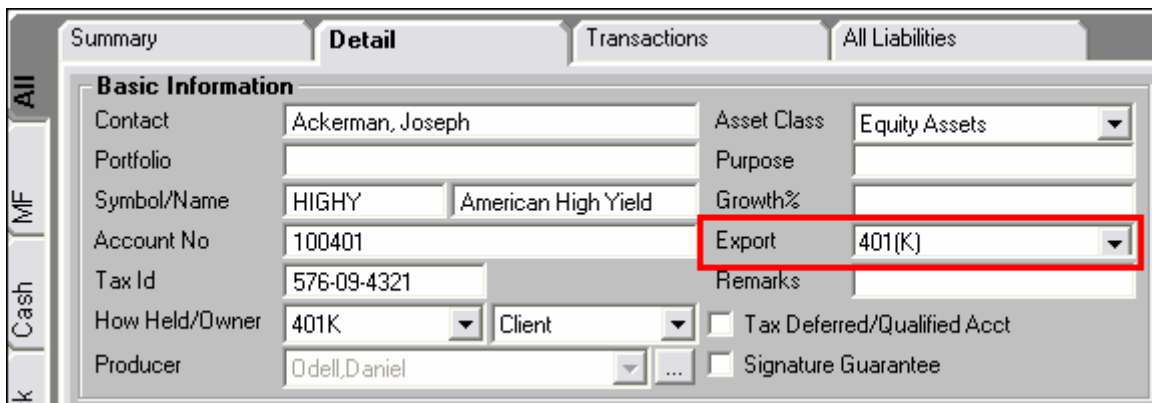

Figure 4: The Export field on the Detail tab of a CDS Investment record.

Before exporting investment data for a contact, be sure that each investment has an entry in the **Export** field that corresponds to a **Type** option in Profiles+.

To ensure consistency in data entry, type options from Profiles+ can be added to a drop-down in the **Export** field.

To add type options from Profiles+™ Professional to the Export field drop-down:
- Left-click in the **Export** field to activate the field.
- Right-click for a **Field** menu.
- In the **Field** menu, select **Choice**.
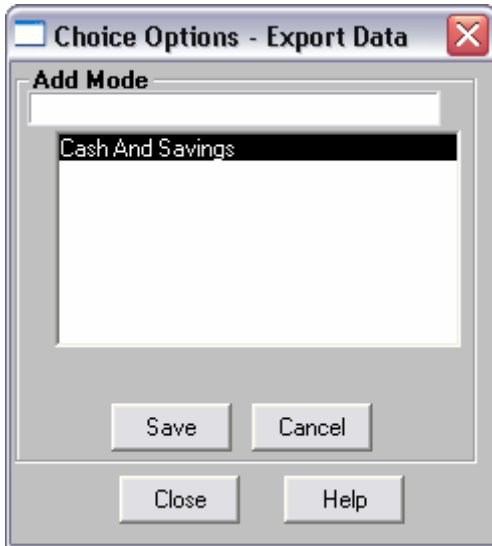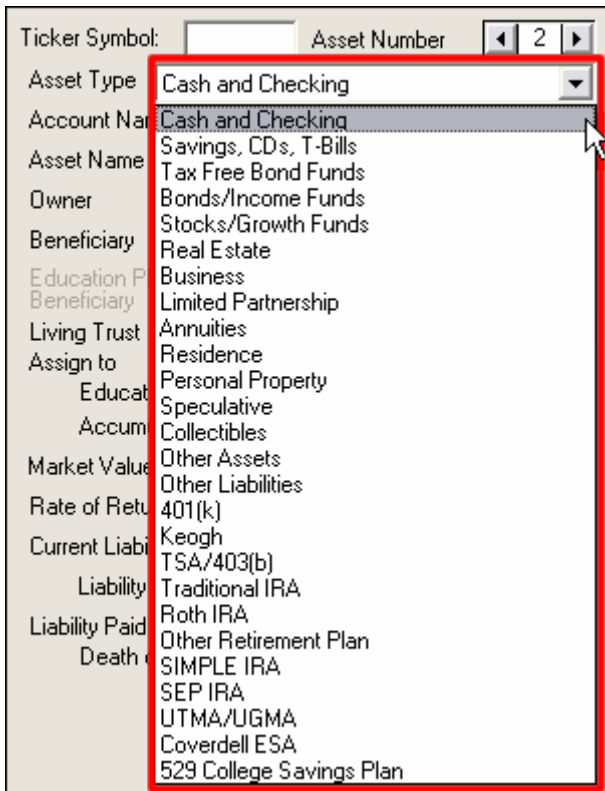- In the **Choice Options** window, click the **Add** button.

Figure 5: The Choice Options window (Add Mode).

- Enter each choice (Asset Type from Profiles+) and click **Save** after each entry.
- When finished, click **Close**.

Type options from Profiles+™ Professional

Exporting Data from CDS into Profiles+™ Professional

Important: CDS contact data (including Investment, Policy, and Dependent data) must be exported to Profiles+™ Professional from within a contact record.

- Open a contact record in CDS.
- Select **Tools** in the menu bar.
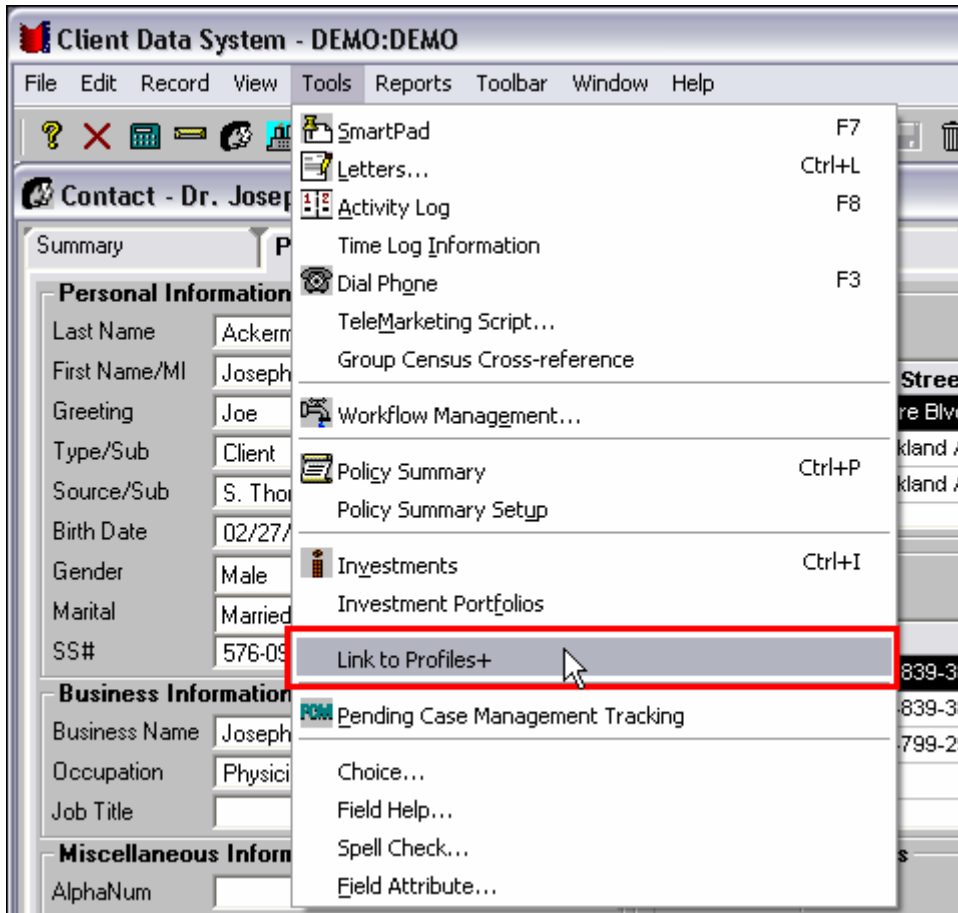- In the **Tools** menu, select **Link to Profiles+**.

Figure 6: The Link to Profiles+ option in the Contact Tools menu.

- Profiles+ will open with the data from the selected contact (and spouse, if applicable) from CDS on display.

For more information on Profiles+™ Professional, you can visit Financial Profiles online at www.profiles.com.