

Client Data System

Volume 87: Dynamic Report Overview -Building a Dynamic Report

This Fast Class File continues the three part series covering Dynamic Reports in CDS. Dynamic Reports are flexible data mining tools that allow you to pull together information captured in CDS based on your criteria. Dynamic Reports also allow you to put information to work by adding contact records to a set, creating activities, or generating correspondence.

🗉 Retirement Seminar Prospects (22)						
>	< ▶ !	L. Le	111 5	703	🔶 🚍 🗊 🧇	
	Last Name	First Name	Туре	Income	All Phones	All Addresses
П	Antonsen	Robert	Prospect	300,000	Rowland Rd, Covina (Pref) : (818)-965-4455. Residence : (626)-799-9021. Cynthia, Secty : (818)-445-6433.	Business (Pref): 735 W. Duarte Rd., Suite 220, Arcadia, CA, 91006 Residence: 2650 Lombardy Road, San Marino, CA, 91108
Г	Bartelo	Frank	Prospect	50,000	Rowland Rd, Covina (Pref) : (818)-965-4455. Residence : (626)-799-9021. Cynthia, Secty : (818)-445-6433.	Business (Pref) : 735 W. Duarte Rd., Suite 220, Arcadia, CA, 91006 Residence : 2650 Lombardy Road, San Marino, CA, 91108
Г	Christiansen	Carolina	Prospect	225,000	Rowland Rd, Covina (Pref) : (818)-965-4455. Residence : (626)-799-9021. Cynthia, Secty : (818)-445-6433.	Business (Pref): 735 W. Duarte Rd., Suite 220, Arcadia, CA, 91006 Residence: 2650 Lombardy Road, San Marino, CA, 91108
Г	Farmer	Eileen	Prospect	22,000	Rowland Rd, Covina (Pref) : (818)-965-4455. Residence : (626)-799-9021. Cynthia, Secty : (818)-445-6433.	Business (Pref): 735 W. Duarte Rd., Suite 220, Arcadia, CA, 91006 Residence: 2650 Lombardy Road, San Marino, CA, 91108
Г	Fredricks	Lawrence	Prospect	120,000	Rowland Rd, Covina (Pref) : (818)-965-4455. Residence : (626)-799-9021. Cynthia, Secty : (818)-445-6433.	Business (Pref): 735 W. Duarte Rd., Suite 220, Arcadia, CA, 91006 Residence: 2650 Lombardy Road, San Marino, CA, 91108
Г	Hallston	Shirley	Prospect	27,000	Rowland Rd, Covina (Pref) : (818)-965-4455. Residence : (626)-799-9021. Cynthia, Secty : (818)-445-6433.	Business (Pref): 735 W. Duarte Rd., Suite 220, Arcadia, CA, 91006 Residence: 2650 Lombardy Road, San Marino, CA, 91108
Г	Hamamoto	Tsuyako	Prospect	40,000	Rowland Rd, Covina (Pref) : (818)-965-4455. Residence : (626)-799-9021.	Business (Pref) : 735 W. Duarte Rd., Suite 220, Arcadia, CA, 91006 Residence : 2650 Lombardy Road, San Marino,
<			.1111			>

Figure 1: Retirement Seminar Prospects Dynamic Report from Fast Class v87.

Dynamic Reports can be used to combine data from different categories in CDS. It's important to mentions that E-Z Data recommends using only one table when possible but when you need to use data from more than one table, begin with the contact table and build from there.

For instance, you could build a dynamic report that would combine contact data and policy data. Many tables, such as the Policy, Investment, and Activity table, include some contact information so in many cases, you can build effective dynamic reports using just one table. As noted in part one of the Dynamic Report overview, the DEMO database is a useful resource for building and testing your dynamic reports. Please feel

free to log in to the demo database and work with the dynamic reports to become familiar with the different columns and tables available

Creating a Dynamic Report

- Click on **Reports** in the main menu bar.
- Click on **Dynamic Reports** in the **Reports** menu.
- Leave the **Description Field** blank to perform an open search and click **OK**.
- Click the Add button in the Report Selection summary toolbar.
- From the Report Definition Wizard, select the Primary Table.

Report Definition Wizard		
· · · · · · · · · · · · · · · · · · ·	Select Primary Table	
	Activity Detail Activity History Activity Tracking Report Address Agent Custom Fields Agent Hierarchy Snapshot Agent Payout Agent's Commission Postings Annuity - Additional Information Application History Appointments Auto Insurance - Driver Information Auto Insurance - Vehicle Information Bonus Commission Components Business Business Business Client Junction Commission Information Commission Schedule Commission Schedule Details	
Cancel	< Back Next > Finish Help	

Figure 2: Table Selection screen in the Report Definition Wizard.

Important Note: You should always begin from the Contact Information table if you're building a Dynamic Report around contact data. Also, Dynamic Reports should be limited to two tables.

- After selecting the Primary Table, click **Next**.
- The Report Column Definition step will open.

Report Column Definition - Step 1 of 5							
Last Name Firs	t Name	All Phones	•				
Columns Available Client No Suffix Middle Greeting Title Sub Type Source Sub Source Occupation Job Title Birth Date	Columns Sel Last Name First Name Type Income All Phones All Address Seminar	es SubTotal	Sort By Direction Ascending Descending				
	< Back	Next >	Cancel Help				

Figure 3: Report Column Definition window.

- Use the **Columns Available** section to define columns. To add columns from a different table, click the **drop-down** below the **Columns Available** section.
- Double-click the column or click on the **Right Arrow** button to move the column into the **Columns Selected** section. *Note: You can adjust the order of the columns by dragging and dropping the columns in the Columns Selected section.*
- After selecting the columns, click **Next**.
- Add filters to the dynamic report Report Selection Criteria step.

Report Selection C	riteria - Step 2 of 5 🛛 👔
×	Selection Criteria
	Filter
	PROSPECT V OAND OR
	Set
· · · · · · · · · · · · · · · · · · ·	
	< Back Next > Cancel Help

Figure 4: Report Selection Criteria window.



- To add filters to your Dynamic Report, click on the first drop-down field.
- Select a filter with a left-click.
- Use the remaining **Filter** drop-down fields to add more filters. If multiple filters are used, define the link operation with the **And** and **Or** options.
- After selecting the filters, click **Next**.
- Select a Standard Spreadsheet output or a MS Word Output and click Next.
- From the **Report Output** tab, select the output settings to define the appearance of the Dynamic Report and click **Next**.
- From the **Report Package Description** tab, give the Dynamic Report a name and click **Finish**.

Report Package	Description - Step 5 of 5	\mathbf{X}
	Report Package Description	
	Description Retirement Seminar Prospects	
	Category Contact	
Ē	Keywords Prospects Attending Retirement Seminar	
¢	Contact Selection Options All Users RunTime Filter Contact Selection Options Include Contacts Include Agents Include Dependents	
	< Back Finish Cancel Help	

Figure 5: Report Selection Criteria window.

- The new Dynamic Report will be added to the Report Selection summary list.
- To run the new Dynamic Report, tag the report and click the **Run** button in the toolbar.