Adding Contacts from the Results of a Dynamic Report to a Set
A **Set** is a group of contact records that is more or less static. A **Set** is a useful tool that you can use to group contacts together that you reference on a regular basis.

To add a list of Contacts to a Set using 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**.

Note: You could also type the name of the Dynamic Report into the Description Field.
- Tag the **Dynamic Report** you wish to use and click on the **Run** button.
- Click the **Tag All** button to select all contacts displayed.
- Click on the **Sets** button.
- Leave the **Description Field** blank to perform an open search and click **OK**.

Note: You could also type the name of the Set into the Description Field.
- Tag the **Set** you wish to add your contacts into and click the **Green Checkmark** or **OK** button. CDS will add your contacts to the selected **Set**.

To view the Set Membership of the Set created above:
- Close the open **Dynamic Report**.
- Click on the **Sets** button.
- Leave the **Description Field** blank to perform an open search and click **OK**.
- Double-click on the **Set**.

To use Dynamic Report data to generate Correspondence:
- From an open list of contacts in a **Dynamic Report**, tag the contacts you wish to send correspondence.
- Click on the **Spreadsheet Correspondence** button in the toolbar.
- Select the **Type** of correspondence and click **OK**.
- Click on **Yes** to confirm the selection.
- Leave the **Description Field** blank to perform an open search and click **OK**.
- Select the **Form Letter**.
- Define your **Printing Options**.
- Click **Print** to generate correspondence.
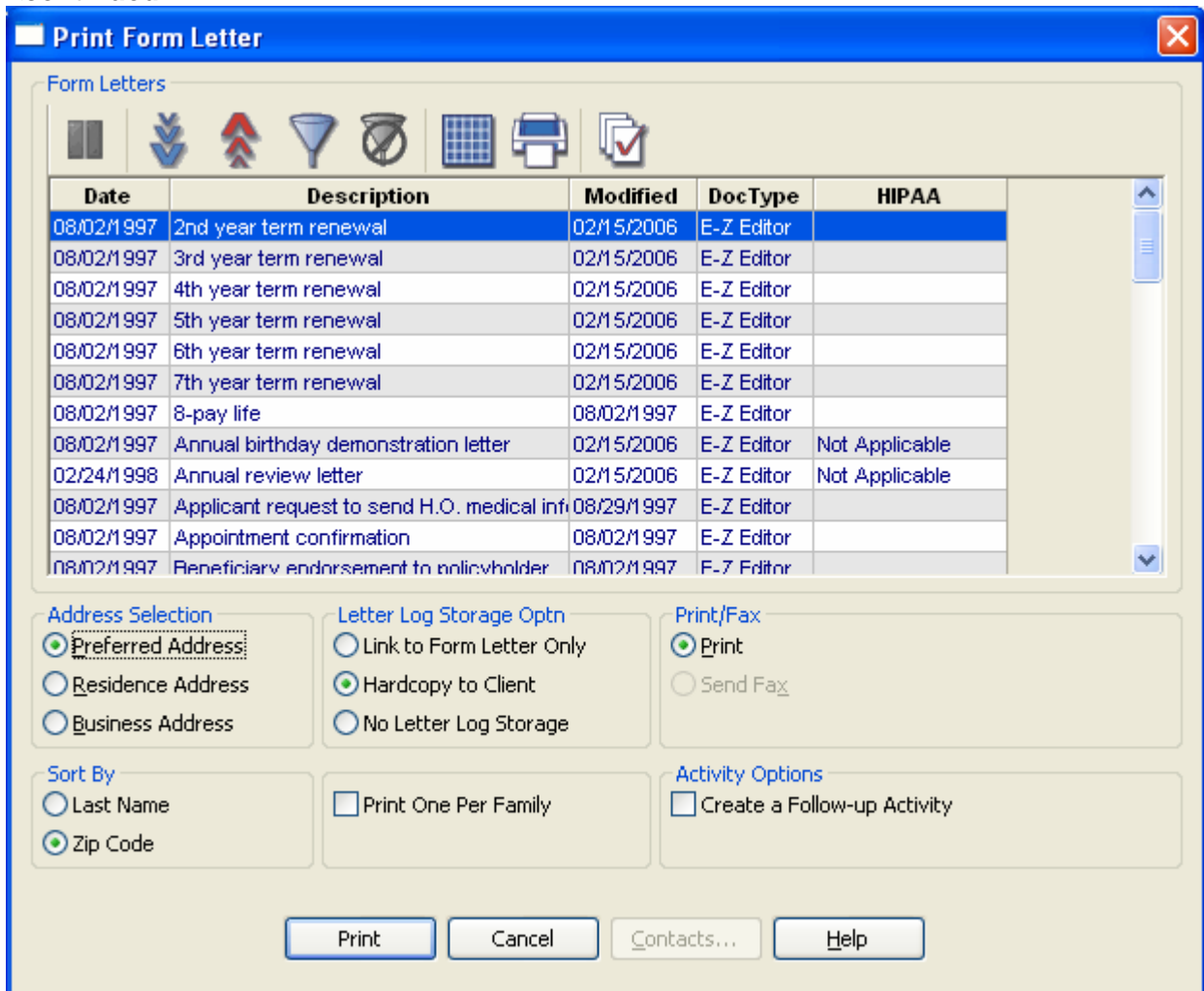
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Figure 1: Print Form Letter window.

To Create Activities for Contact Records in a Dynamic Report:
- From an open list of contacts in a **Dynamic Report**, tag the contacts you wish to create activities for.
- Click the **Activities** button in the toolbar.
- Click on **Yes** to confirm the selection.
- Select the **Users** the activities will be assigned to in the **Mass Activity Creation** window.

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Figure 2: Mass Activity Creation window.

- Define the **Activity Type** and **Activity Sub-Type**.

Note: By default, the Mass Activity Creation window is set to create a series of timed activities.

- To create a series of untimed **To Do** activities, tag the **Add as ToDo Activity** option.
- In the **Group Size** field, define the number of activities to be scheduled per day.
- In the **Every Day** field, define the number of days between scheduled activities.

Note: You can also use the Mass Activity Creation screen to add the selected contacts to a set.

- Enter activity information in the **Subject** and **Reason** fields and click **OK**.