

# Fast•Class File

SmartOffice

## Volume 39: Dynamic Report Download

This Fast Class covers the process of downloading dynamic reports and adding them to SmartOffice.

### Downloading the file:

- From the Dynamic Report Download page, click the download for the selected dynamic report link.
- When the **File Download** window opens, click the **Save** button.

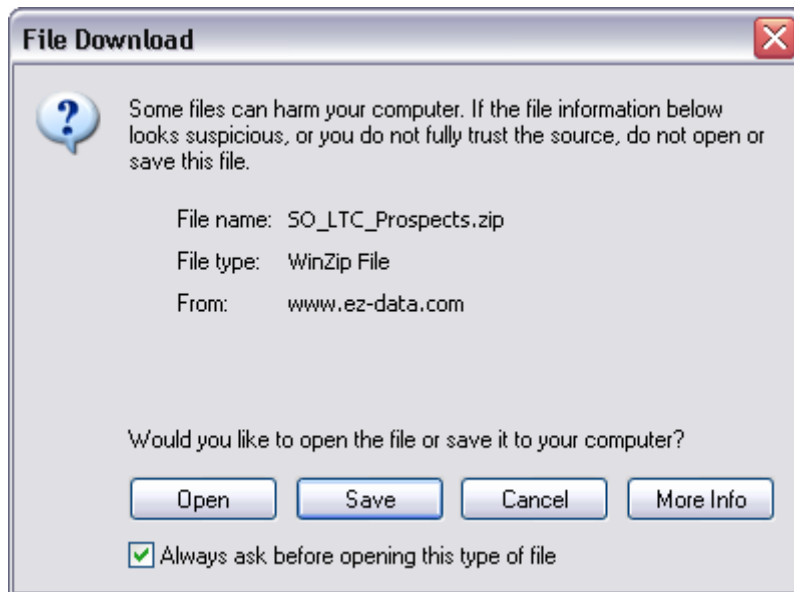


Figure 1: The File Download window.

- When the **Save As** window opens, use the **Save in** drop-down to select a location on your computer to store the .zip file.
- Click **Save**.
- The .zip file contains a folder with an .xml file that can be loaded into SmartOffice. The file may also contain .rtf documents that can be opened in Microsoft Word. Extract the folder from the .zip file

*Note: An unzipping utility is necessary to extract files. Users of Microsoft Windows XP can use the unzipping utility built in to the operating system. Windows 2000 users can download WinZip from the SmartOffice Training and Support Center.*

## Importing the Dynamic Report into SmartOffice:

- Select **Reporting/Marketing** in the Main Menu.
- Select **Dynamic Reports**.
- Without entering any search criteria, click the **Search** button in the **Search Dynamic Reports** screen to open the **Dynamic Report Summary** screen.

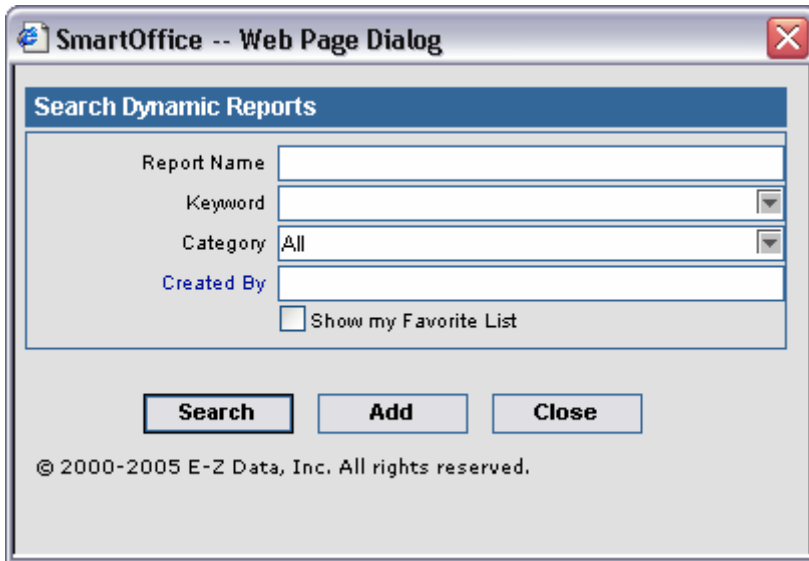


Figure 2: The Search Dynamic Reports screen.

- Click the **Import - Dynamic Report Definition** button in the **Dynamic Report Summary** toolbar.



Figure 3: The Import – Dynamic Report Definition button.

- Click the **Browse** button in the **Import – Dynamic Report Definition** screen.

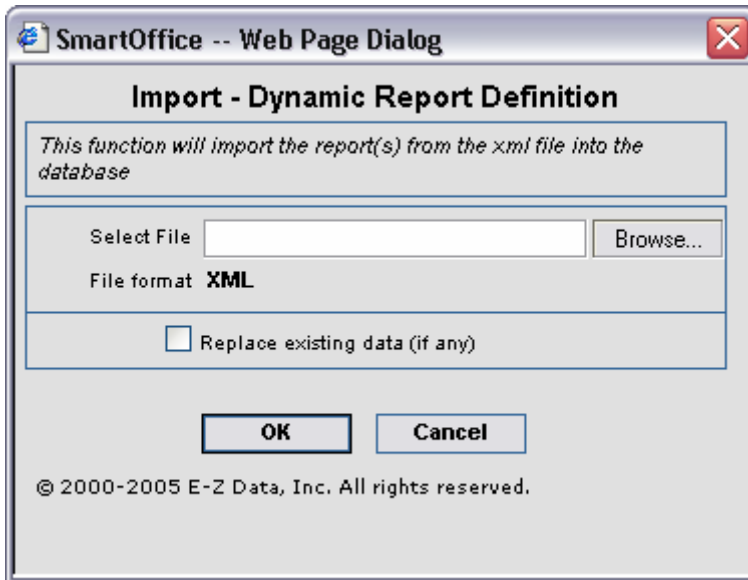


Figure 4: The Import – Dynamic Report Definition screen.

- Use the **Look in** drop-down field in the **Choose File** screen to locate the new dynamic report folder on your system.

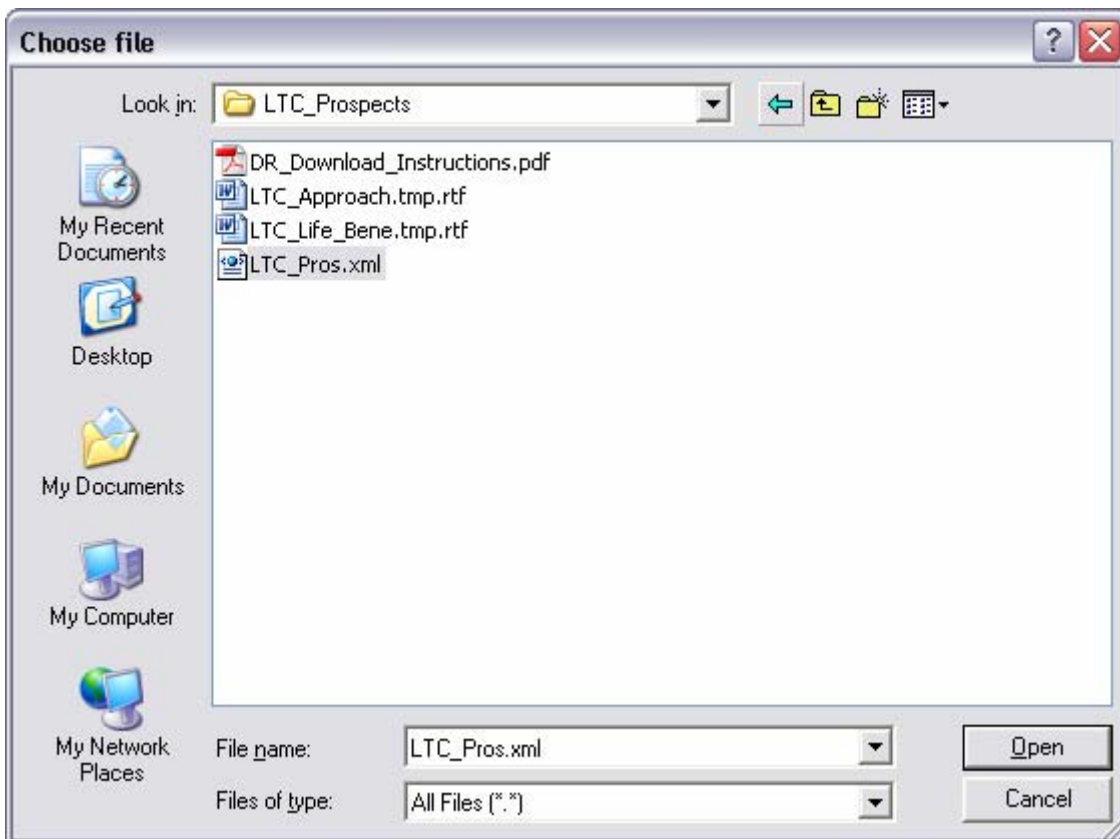


Figure 5: The Choose File screen.

- Select the .xml file and click **Open**. The new dynamic report with filter will be loaded into SmartOffice.

### Importing the Sample Form Letter into SmartOffice:

- Select **Office Setup** in the Main Menu.
- Select **Form Letters**.
- Click the **Add** button in the **Search Form Letters** screen.
- Select the **Form Letter** option in the **Select the type of document to be created** screen and click **OK**.

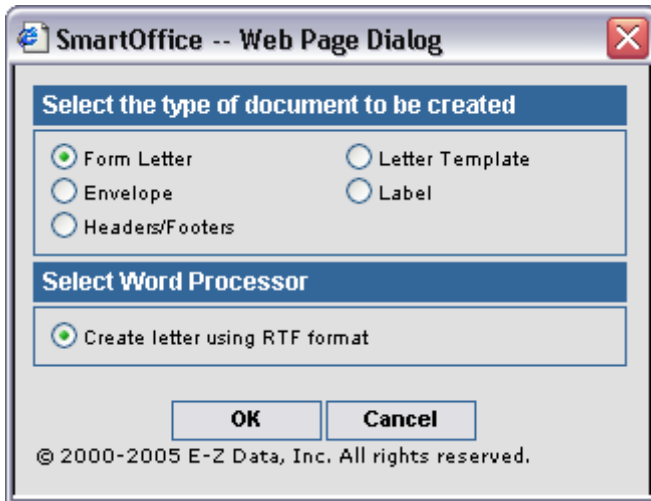


Figure 6: The Select the type of document to be created screen.

- Select **No** in the confirmation screen.

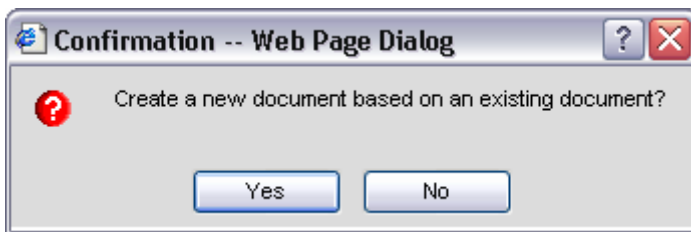


Figure 7: The Confirmation screen.

*Important: The confirmation screen references an existing document. Though the new document will be based on an existing document (one of the .rtf documents in the new dynamic report folder), you will need to select **NO** in the confirmation screen. The **Confirmation** screen references documents that exist in SmartOffice – such as form letters and templates. As the sample form letter does not exist in SmartOffice yet, the appropriate selection is **NO**.*

- SmartLink for Word will open a new Word document.
- Open the new dynamic report folder and find the .rtf and the file.
- Select one of the .rtf files and open it Microsoft Word.

- With the .rtf file open in Microsoft Word, select **Edit** in the main menu and then select **Select All**.

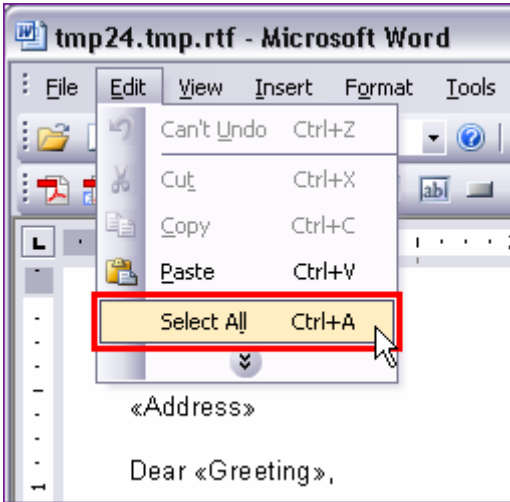


Figure 8: The Microsoft Word Edit menu (Select All option selected).

- After all the text in the letter is highlighted, select **Edit** in the main menu and then select **Copy**.
- Minimize the window displaying the .rtf file and return to the Word document in SmartLink for Word.
- Right-click on the blank document in SmartLink for Word and then select **Paste** in the context menu.
- The contents of the selected sample form Letter (including merge codes) will be added to the SmartLink for Word document in SmartOffice.
- Click the **Save and Close** button in the **SmartLink for Word** toolbar.

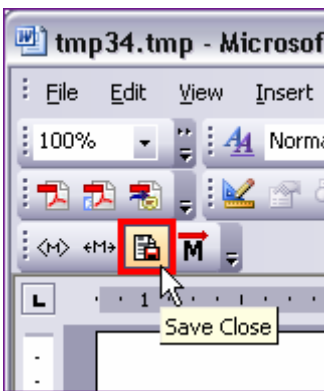


Figure 9: The Save and Close button in the SmartLink for Word toolbar.

- In the **Title** field of the **SmartLink for Word [Save Form Letter]** screen, enter the name referenced in the instructions included in the dynamic report folder.
- Click **Save** to add the sample form letter to SmartOffice.

## Using the Dynamic Report:

- Select **Reporting/Marketing** in the Main Menu.
- Select **Dynamic Reports**.
- In the **Search Dynamic Reports** screen, enter search criteria in the **Report Name** field and click **OK**.
- A summary screen will open with the dynamic report on display.
- To modify the dynamic report or view the filter criteria of the attached filters – select the dynamic report and click the **Modify Record** button in the **Dynamic Report Summary** toolbar.



Figure 10: The **Modify Record** button in the **Dynamic Report Summary** toolbar.

- To run the dynamic report, double-click the **Report Name** hypertext link or select the report and click the **Run** button.

## Using the Sample Form Letter:

- After running the dynamic report, select records in the results and click the **Mass Correspondence** button.
- Select the **Print Form Letter option** and enter the name of the form letter and click **OK**.
- If more than one letter meets the search criteria, click the letter name hypertext link of the correct letter.
- SmartLink for Word will open the letter with expanded merge codes in print preview mode.
- After reviewing letter, click the **Close** button in the **SmartLink for Word (print preview mode)** toolbar. Continue reviewing documents as needed.
- Select **Yes** in the confirmation dialogue window to print the letters.

## Modifying the Sample Form Letter

- Select **Office Setup** in the Main Menu.
- Select **Form Letters**.
- Enter the name of the form letter in the **Search Form Letters** screen and click **Search**.
- If more than one form letter meets the search criteria, select the correct letter and click the **Word** icon to open the letter. If only one letter meets the search criteria, SmartLink for Word will open the letter.
- Make adjustments as needed.