

Fast•Class File

SmartOffice

Volume 59: Dynamic Report Sorting

Dynamic Report display and sorting options provide you with a tremendous amount of flexibility in the way you view and analyze data displayed in dynamic reports.

Sort By Options

Sort By option selection will determine the field used when data in a dynamic report is sorted. Options available in the **Sort By** drop-down will be determined by category selection when the dynamic report is created.

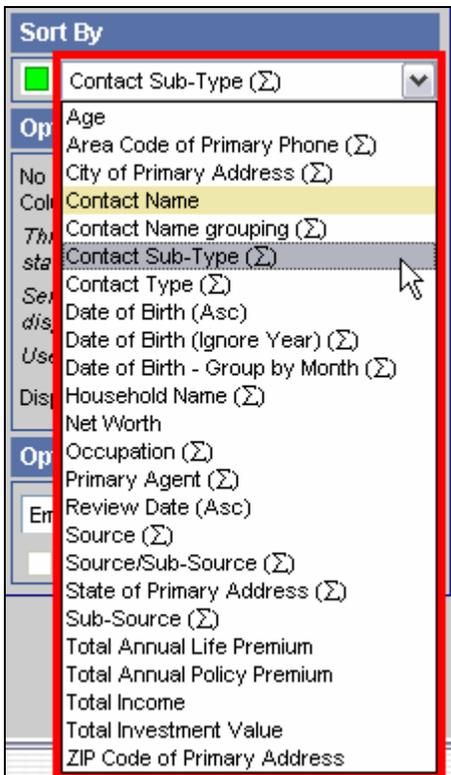


Figure 1: The Sort By drop down on the Column Description tab of the Dynamic Report definition screen.

Sort By options with the Sigma character (Σ) will group data in the dynamic report summary based on data in the selected **Sort By** option. For example, with **Contact Sub-Type** selected as the **Sort By** option, data in the dynamic report will be grouped by data in the **Contact Sub-Type** column.

Display Options

Dynamic report data can be displayed according to three different options –

- Normal
- Summary
- Tree

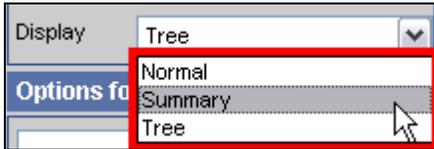


Figure 2: The Display drop down on the Column Description tab of the Dynamic Report definition screen.

Summary Display Option

The **Summary** display option will group data based on the option selected in the **Sort By** option. Total number of records in each summary group will be calculated in the summary report. No columns will need to be selected as the only columns on display will be the columns associated with the **Sort By** selection.

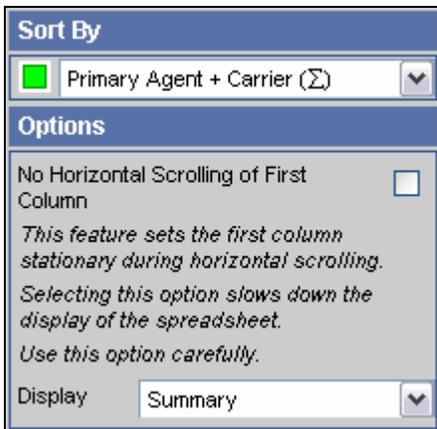


Figure 3: Sort By and Display options for Pending Case Summary Report by Producer.

Pending Case Summary Report By Producer - Run on 01/20/2006 03:18PM

Carrier Name	Count
Advisor - Able, Christian Adam	
20th Century Life Insurance	2
ABC Life	5
Able, Christian Adam	7
Advisor - Alexander, Sherman	
20th Century Life Insurance	2
ABC Life	1
Alexander, Sherman	3
Advisor - Anderson, Philip	
20th Century Life Insurance	1
ABC Life	4
Beneficial Life Insurance Company	1
Blue Sky Mutual	1
North American Medical	1
Transamerica Occidental Life Insurance Company	8
Anderson, Philip	16

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Figure 4: Pending Case Summary Report by Producer

Tree Display Option

The **Tree** display option will add tree controls to data grouped in a dynamic report based on the option selected in the **Sort By** option.

Sort By

Contact Sub-Type (Σ) ▼

Options

No Horizontal Scrolling of First Column

This feature sets the first column stationary during horizontal scrolling. Selecting this option slows down the display of the spreadsheet. Use this option carefully.

Display ▼

Figure 5: Sort By and Display options for Long Term Care Prospect report.

LTC Prospects - Run on 01/20/2006 03:23PM

Contact Name	Type	Source	Occupation	DOB	Review Date
Sub-Type: A					
- Ackerman, Joseph M.	Client	Referral	Medical	02/27/1953	08/27/2006
- Ansong, Judy A.	Client	Referral	Manufacturing	01/03/1955	01/15/2006
- Buy, William	Client	Seminar	Law	07/30/1961	10/10/2006
- Chung, Harold	Client	Referral	Automotive	02/07/1958	03/31/2006
- Hurst, Suzy	Client	Referral	Food	08/17/1952	05/15/2006
Sub-Type: B					
- Anderson, Mike	Client	Referral	Media	01/04/1959	01/15/2006
- Ansong, David M.	Client	Referral	Medical	07/20/1953	02/15/2006
- Gunderson, Betty	Client	Referral	Real Estate	04/23/1950	09/23/2006

Records Shown: 8 Total Records: 8 Total children: 8

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Figure 6: Long Term Care Prospect report with tree control.

No Horizontal Scrolling of First Column

When the No Horizontal Scrolling of First Column option is selected, the first column of the dynamic report will be static while the rest of the data in the report can be scrolled through horizontally.

Sort By

Contact Name (Σ)

Options

No Horizontal Scrolling of First Column

This feature sets the first column stationary during horizontal scrolling.

Selecting this option slows down the display of the spreadsheet.

Use this option carefully.

Display: Normal

Figure 7: Sort By and Display options for Life Settlements Prospect report.

Life Settlement Prospects - Run on 01/20/2006 03:28PM



<input type="checkbox"/>	Contact Name	All Addresses	All Phones	Policy #	Product Name
<input type="checkbox"/>	Hallston, Shirley	Residence : 825 E. Sacramento Ave. Altadena, CA 91001 Business : P.O Box 92705 Pasadena, CA 91109	Residence : (626) 790-6800 Business : (560) 356-9876 Business : (560) 356-9876	B34874	Preferred Life
<input type="checkbox"/>	Adams, William	Residence : 5321 El Molino St. Pasadena, CA 91051	Residence : (626) 512-1231 Business : (626) 585-3550 Fax : Residence : (626) 962-2032	B47586	Preferred Life
<input type="checkbox"/>	Christiansen, Carolina	Residence : 508 Mound Avenue South Pasadena, CA 91030 Business : 321 S.Main Street Long Beach, CA 90746	Residence : (626) 280-3643 Business : (213) 224-6503 Business : (310) 237-4882 Fax : Business : (310) 982-7437	124458754	Economizer
<input type="checkbox"/>	Marquez, Larry	Residence : 131 East Wilson Ave. Glendale, CA 91203	Residence : (626) 764-9873	56875145	Preferred Life

Records Shown: 4 Total Records: 4

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Figure 9: The Life Settlements Prospect report (after horizontal scrolling – first column is static).