# 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.

Sor	t By			
	Contact Sub-Type (∑)			
Op	Age Area Code of Primary Phone ( $\Sigma$ )			
No	City of Primary Address ( $\Sigma$ )			
Col	Contact Name			
Thi	Contact Name grouping (∑)			
sta	Contact Sub-Type (2)			
Sei	Contact Type (2) Kg			
dis	Date of Birth (Asc) Date of Birth (Impare Veers) (S)			
Use	Date of Birth (ignore Year) ( $\Sigma$ ) Date of Birth - Group by Month ( $\Sigma$ )			
Dis	Household Name (∑)			
	Net Worth			
Op	Occupation (∑)			
	Primary Agent (∑)			
En	Review Date (Asc)			
	Source ()			
	Source/Sub-Source ( <u>)</u>			
	State of Primary Address (신) Sub Service (조)			
	Sub-Source (Z.) Total Repuel Life Dravium			
Total Annual Life Premium				
Total Josoma				
	Total Investment Value			
	ZIP Code of Primary Address			

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 ( $\Sigma$ ) 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

Display	Tree
Ontione fo	Normal
Options to	Summary
	Tree 너주

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.

Sort By						
Primary Agent + Carrier (Σ)						
Options						
No Horizontal Scrolling of First						
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	Summary	~				

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
	<u> Advisor - Alexander, Sherman</u>	
	20th Century Life Insurance	2
	ABC Life	1
Alexander, Sherman		3
	<u> Advisor - Anderson, Philip</u>	
	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 🗸

© 2000-2005 E-Z Data, Inc. All rights reserved.

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						
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	Tree	~				

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



	-		📥 🚮 🗊 父 😽 🏆	🗶 🗉 🔣 🤞	5 🖩 🚟
me	Туре	Source	Occupation	DOB	Review Date
e: A					
n, Joseph M.	Client	Referral	Medical	02/27/1953	08/27/2006

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

	Contact Name	Туре	Source	Occupation	DOR	Review Date
	📮 Sub-Type: A					
	<ul> <li>Ackerman, Joseph M.</li> </ul>	Client	Referral	Medical	02/27/1953	08/27/2006
	<ul> <li>Ansong, Judy A.</li> </ul>	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
	<ul> <li>Ansong, David M.</li> </ul>	Client	Referral	Medical	07/20/1953	02/15/2006
	- Gunderson, Betty	Client	Referral	Real Estate	04/23/1950	09/23/2006
2						5
Rec	ords Shown: 8 Total R	ecords: 8 Total childre	n: 8			

© 2000-2005 E-Z Data, Inc. All rights reserved.

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

## No Horizontal Scrolling of First Column Option

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						
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.



						🛛 🜠 🏹 🛐 🗄	é 🗄 🖩 🖷 🖞	tî 🗊
	Contact Name	Age	Owner	Holding Type	All Addresse	s	All Phones	
	Hallston, Shirley	78	Randall Hallston	Life	Residence : Business :	825 E. Sacramento Ave. Altadena, CA 91001 P.O Box 92705 Pasadena, CA 91109	Residence : <b>Business :</b> Business :	(626) 790 (560) 356 (560) 356
	Adams, William	69	William Adams	Life	Residence :	5321 El Molino St. Pasadena, CA 91051	<b>Residence :</b> Business Fax : Residence :	(626) 51 (626) 58 (626) 98
	Christiansen, Carolina	75	Carolina Christiansen	Life	Residence : <b>Business :</b>	508 Mound Avenue South Pasadena, CA 91030 321 S.Main Street Long Beach, CA 90746	Residence : Business : <b>Business :</b> Business Fax :	(626) 280 (213) 224 (310) 237 (310) 982
	Marquez, Larry	71	Larry Marquez	Life	Residence :	131 East Wilson Ave. Glendale, CA 91203	Residence :	(626) 76
2								5
Rec	ords Shown: 4	Total R	ecords: 4					

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

© 2000-2005 E-Z Data, Inc. All rights reserved.

Figure 8: The Life Settlements Prospect report (pre-scrolling).



					👽 🖌 🗡	E ###	🗄 🐺 📬 🗊 👘
	Contact Name	All Addresse	S	All Phones		Policy #	Product Name
	Hallston, Shirley	Residence : Business :	825 E. Sacramento Ave. Altadena, CA 91001 P.O Box 92705 Pasadena, CA 91109	Residence : <b>Business :</b> Business :	(626) 790-6800 (560) 356-9876 (560) 356-9876	B34874	Preferred Life
	Adams, William	Residence :	5321 El Molino St. Pasadena, CA 91051	<b>Residence</b> Business Fax : Residence :	: (626) 512-1231 (626) 585-3550 (626) 962-2032	B47586	Preferred Life
	Christiansen, Carolina	Residence : Business :	508 Mound Avenue South Pasadena, CA 91030 321 S.Main Street Long Beach, CA 90746	Residence : Business : <b>Business :</b> Business Fax :	(626) 280-3643 (213) 224-6503 (310) 237-4882 (310) 982-7437	124458754	Economizer
	Marquez, Larry	Residence :	131 East Wilson Ave. Glendale, CA 91203	Residence	: (626) 764-9873	56875145	Preferred Life
<		1	N	1111			>
Re	cords Shown: 4	Total Records	: 4				

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

© 2000-2005 E-Z Data, Inc. All rights reserved. Figure 9: The Life Settlements Prospect report (after horizontal scrolling – first column is static).

