Fast Class File | SmartOffice®

Dynamic Reports

Dynamic Reports are flexible data mining tools that allow you to pull together information captured in SmartOffice 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.

To build a Dynamic Report:
- Select **Reporting and Marketing** in the main menu.
- Select **Dynamic Reports**.
- Click the **add** button in the Dynamic Report Summary toolbar.
- Click on the Primary Category.

Figure 1: Category window

For example: If you'd like to build a Dynamic Report with policy <u>and</u> contact data, you could select the Policy – Basic Information category, since all policies are connected to contact records in the Policy – Basic Information category.

- When the Dynamic Report window opens, select the **columns** you'll need included in your Dynamic Report.
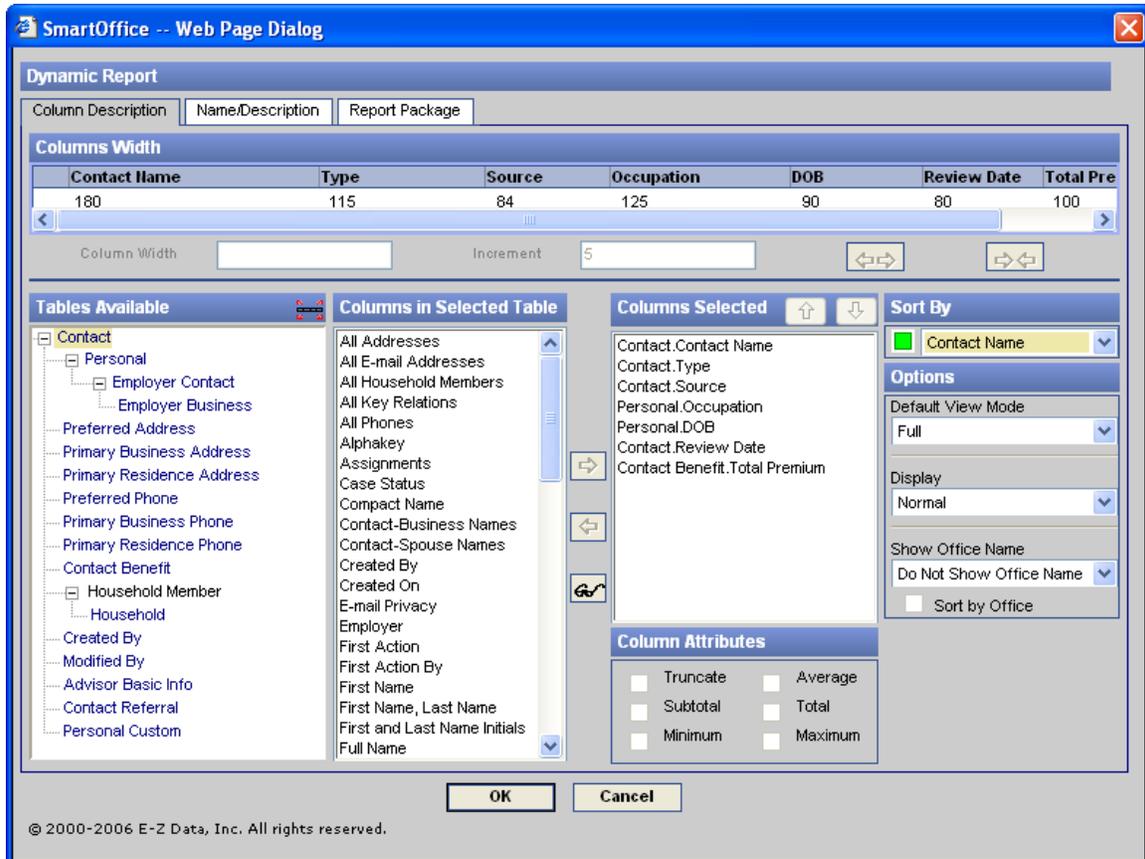

Figure 2: Dynamic Report window

*Note: If you cannot find a particular column, click on the **Search** button, the button that looks like a pair of glasses. Type the name of the column in the column name field.*

- After defining your columns in the Columns Selected section, click on the **Name/Description** tab.
- Give the Dynamic Report a name and a description.
- If you'd like to add one or more filters attached to the Dynamic Report, click on the **Search** button to perform an open search, or, type the name of the filter in the filter name field.
- To create the Dynamic Report, click **OK**.