

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.

🚰 SmartOffice Web Page Dialog						×
Dynamic Report		_		_		
Column Description Name/Description	Report Package					
Columns Width						
Contact Name T	ype S	Source	Occupation	DOB	Review Date	Total Pre
180	115	84	125	90	80	100
						2
Column Width	Inc	rement 5		4	⇒ ⇔ ⇔	
Tables Available	Columns in Selecte	ed Table	Columns Selected	∂ ₽	Sort By	
Contact	All Addresses	~	Contact.Contact Name		Contact Name	~
	All E-mail Addresses		Contact.Type		Ontions	
Employer Contact	All Household Member	'S	Contact.Source		optiona	
Employer Business	All Phones	=	Personal.Occupation		Default View Mode	
Preterred Address	Alphakey		Contact Review Date		Full	<u> </u>
Primary Business Address	Assignments		Contact Benefit.Total P	remium		
Primary Residence Address	Case Status				Display	
Drimerred Priorie	Compact Name				Normal	<u> </u>
Primary Business Prione	Contact-Business Nar	nes 🗠				
Context Report	Contact-Spouse Name	35			Show Office Name	
Household Member	Created On	6	~		Do Not Show Office	e Name 🗡
Household	E-mail Privacy				Sort by Office	
Created By	Employer		Column Attributor			
Modified By	First Action		Column Attributes			
Advisor Basic Info	First Action By		Truncate	Average		
Contact Referral	First Name, Last Name		Subtotal	Total		
Personal Custom	First and Last Name In	itials	Minimum	Maximum		
	Full Name	×		in second second		
UK Cancel						
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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**.

