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.

Sets

A Set is a grouping of Contact Records that is more or less static. A Set is a useful tool that you can use to group contacts together that you will be contacting or referencing on a regular basis. The Sets feature is a tool specifically used for Contact Records. For instance, you might create a set of contacts that receive a quarterly newsletter. Contact Records can be placed into Sets using Filters or by individual selection. Sets can be useful when you need a group of records created partly by using a Filter, and partly by ad hoc selection.

To add Contact Records from a Dynamic Report to a Set:
- Select **Reporting and Marketing** in the main menu.
- Select **Dynamic Reports** from the Reporting/Marketing menu.
- Type the name of your report in the **Report Name** field of the Search Dynamic Reports window and click on the **Search** button.
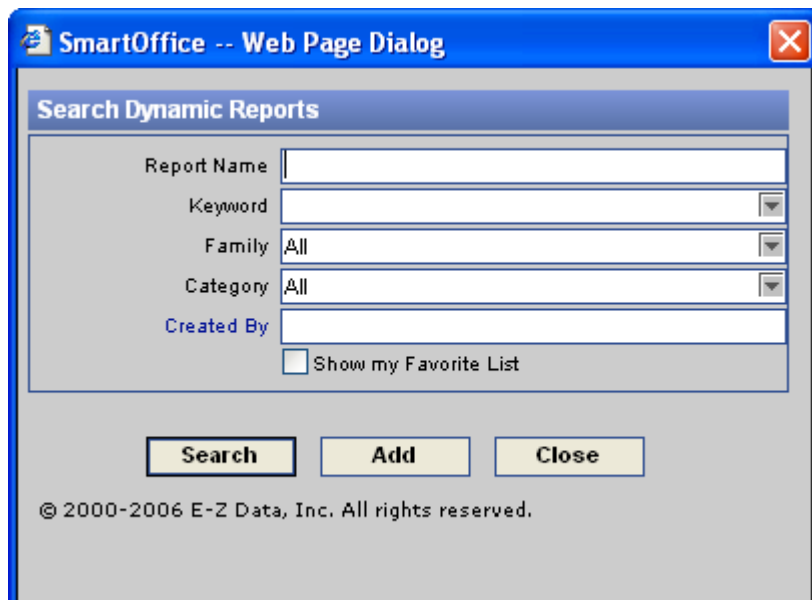

Figure 1: Search Dynamic Reports window

- If your report is not already on display, select your report from the Dynamic Report Summary screen.
- Click the **Run Report** button.
- From the open Dynamic Report, tag the contacts you would like added to the Set.
- Click on the **Add to a Set** button.
- From the Search Sets window, type the name of the Set in the **Set Name** field and click on the **Search** button.
- Tag your Set from the Set Summary screen and click **OK**.
- Your Contact Records from your Dynamic Report have now been added to your selected Set.

To view the Set membership:
- Select **Contact** in the main menu.
- Select **Sets** from the Contact menu.
- From the Search Sets window, type the name of the Set in the **Set Name** field and click on the **Search** button.
- If your Set is not already on display, select your Set from the Set Summary screen.
- Click on the **Set Members** tab.